Business Survey of Cam, Dursley and Surrounds: Detailed Report

Prepared by: The Engine Hub CIC

September 2023

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Front Cover. Littlecombe Business Park, Dursley

1.0 BACKGROUND AND APPROACH

1.1 Purpose

The purpose of the survey is twofold:

(a) To help support the development of the local business community by:

- Providing a better understanding of the current business "demographics" in the local community – nature of businesses, their scale, maturity etc – against which future economic development can be assessed;
- Providing empirical evidence to support future applications for external funding (by The Engine, councils, local businesses and/or other interested parties) to third parties which will be beneficial to the development of local businesses;

(b) To help The Engine Hub CIC identify potential actions to deliver its three key strategic objectives:

- Supporting and connecting local businesses to help them thrive and grow;
- Providing education and training so as to give local businesses and residents the opportunity to gain skills, develop opportunities and be inspired;
- Providing leadership and mentoring opportunities through developing successful local social enterprises.

Funding for this the Business Survey has been kindly provided by:

- The Hotspots Network (https://gloucestershirehotspots.org/)
- Dursley Town Council
- Cam Parish Council

1.2 Geography

The focus of the survey is based upon six local parishes being:

- Dursley Town Council (shown as Dursley CP in Figure 1);
- Cam Parish Council
- Coaley Parish Council
- Stinchcombe Parish Council
- Owlpen Parish Council

- Uley Parish Council

However, national data sources are generally not parish based – most data is available by postcode. This report is therefore largely based upon those businesses with postcodes of GL11 4xx, GL11 5xx and GL11 6xx as shown in Figure 2.

Recognising the nature of their connectivity, the report also includes businesses located on the Wisloe Business Park between the M5 and A38.

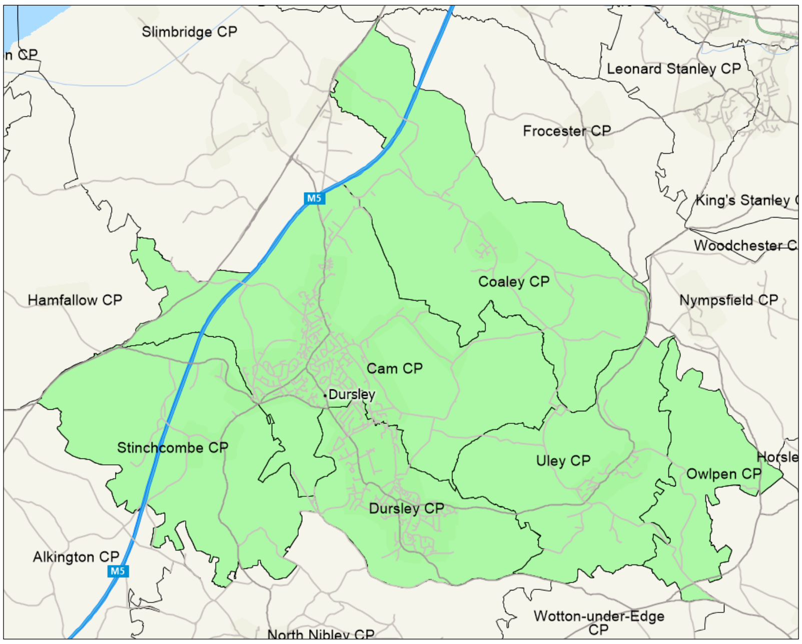

Figure 1: Local Parishes

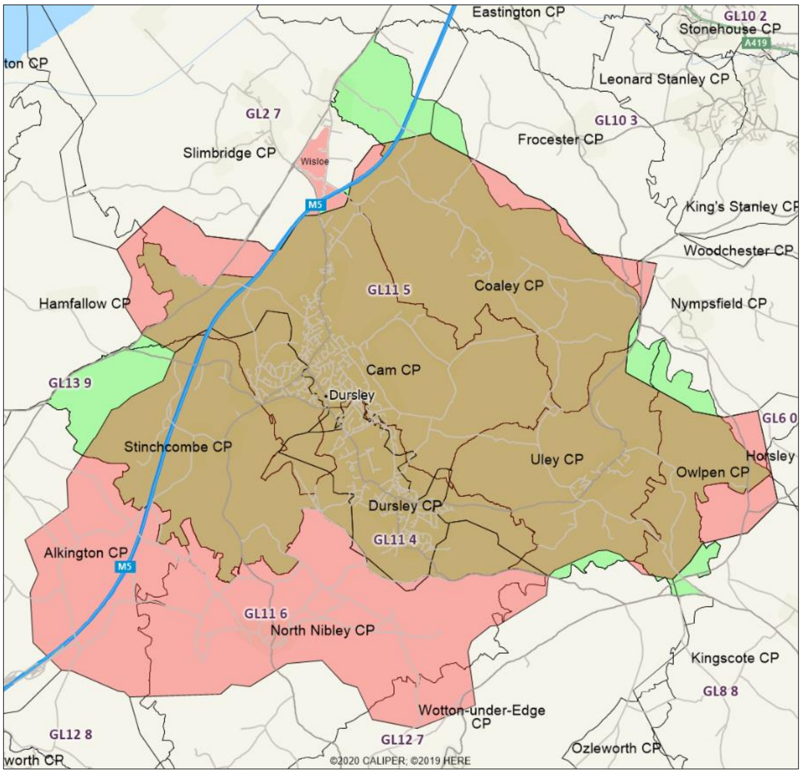

Figure 2: Local Parishes and GL11 Postcode

As Figure 2 shows, the GL11 postcode area is broadly equivalent to the parishes listed but extends to the south to include parts of North Nibley and Alkington parishes.

However, data from the 2011 and 2021 census is available at a ward level and so this report includes data relating to the following four wards:

- Dursley
- Cam East
- Cam West
- Coaley and Uley

The dark green area in Figure 3 represents the area of overlap between the parishes shown in light green in Figure 1 and those wards shown in blue. There is a degree of mismatch - ward data from the census includes Nympsfield but excludes some information relating to Stinchcombe. Whilst relatively large in area terms, these mismatches are not material to the analysis in this report.

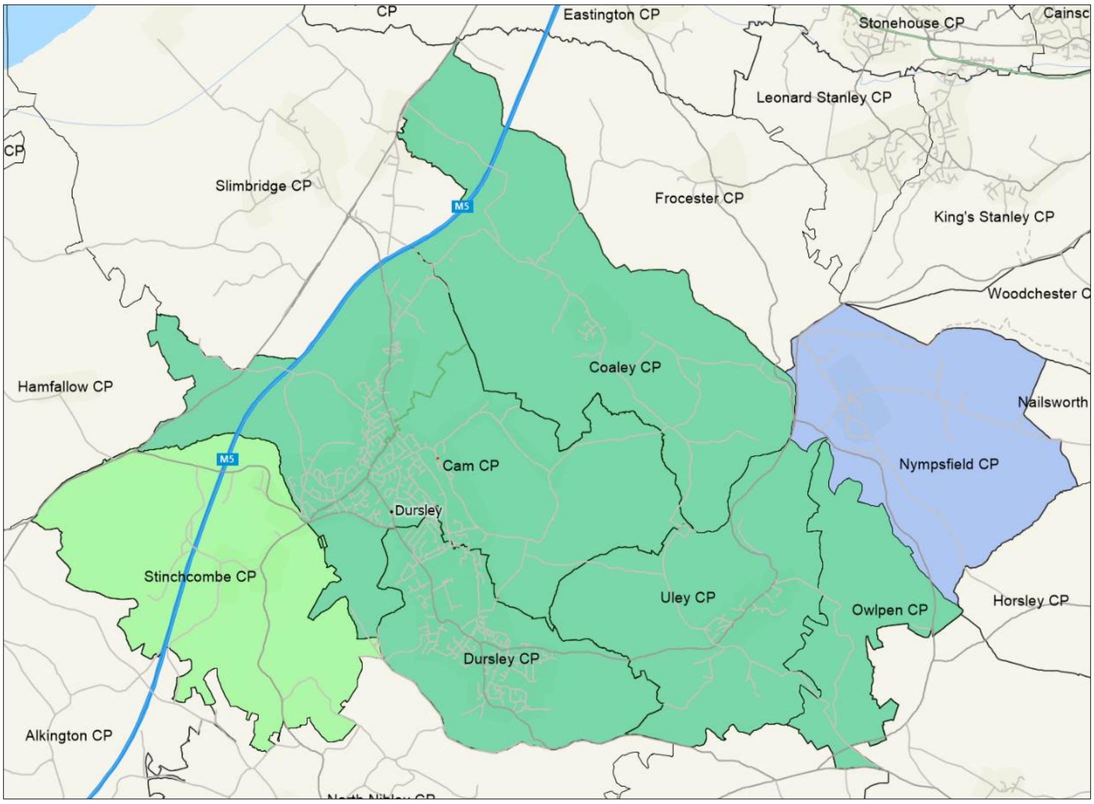

Figure 3: Town/Parish Councils (light green) and Ward (blue)

This report covers all of Cam, Dursley and surrounds and for simplicity, referred to in the report as “C&D”.

As requested, separate versions of the report specific to the boundaries of Cam Parish Council and Dursley Town Council will be prepared in Autumn 2023.

1.3 Neighbourhood Development Plans

In 2014 Dursley Town Council engaged Gloucestershire Rural Community Council ("GRCC") to undertake a Business Survey as part of the preparation of the Neighbourhood Development Plan. The findings of the Survey can be found in Appendix 1 and the key recommendations are shown in the box below.

- *Better mix of businesses within the town;*
- *Town needs to attract customers with a higher disposable income;*
- *More business units on the Littlecombe Estate*
- *Free long term parking*
- *Reduced/zero business rates*
- *More events to draw people into town e.g. Autumn Festival.*

Since this previous survey, the development of several larger residential areas and the impact of COVID-19 have led to some significant changes to the local economy.

The **Dursley Neighbourhood Development Plan 2018-31** also pre-dates COVID-19. It states:

- *Employment has changed significantly in the town in recent years as manufacturing companies have been relocating out of the town and agricultural activity has reduced.*
- *This has resulted in a reduction in the total number of businesses. Littlecombe Business Park was listed as a 'Key Employment Site' in the 2015 Local Plan and was therefore protected from change of use to non E/B-Class uses.*
- *To help the local economy to thrive once more, start-up businesses will be encouraged within the town subject to no adverse impacts found on the residential community, transport network or the environment.*
- *This is supported, with recognition that small businesses are the most significant sector within Dursley and local economic analysis emphasises a focus on manufacturing, retail and tourism.*
- *The Town Council is keen to reverse losses in employment and strengthen opportunities for local people.*

Cam Parish Neighbourhood Development Plan 2019-2031

The Cam Neighbourhood Development Plan also pre-dates COVID and contains three policies with respect to employment:

O13	Protect existing employment sites in the Parish
O14	Encourage provision of high quality employment space for start-up, small and medium sized businesses, allowing flexibility for businesses to start, grow, and stay in Cam.
O15	Encourage house builders to build with home office workers in mind and developers to include fibre broadband networks as part of their designs.

1.4 Data Sources

This report has been based on a mix of publicly available information and a business survey. Details on publicly available sources can be found in Appendix 2.

In the period Feb-Jun 2023 this publicly available data was collated, verified and formatted into a Local Business Database with over 1,200 lines of data. The resulting database is as comprehensive as reasonably possible without access to confidential data (eg on VAT registered businesses).

1.5 Online Business Survey

In mid May 2023 the Engine sent an invitation by post to 834 businesses in C&D to complete an online Business Survey hosted by Surveymonkey. Business details were taken from the Local Business Database and as far as possible a single invitation was sent to businesses with multiple addresses and to an address with multiple businesses. To encourage participation, entry into a prize draw was offered.

54 responses were recorded on Surveymonkey – a response rate of 6.0%. This is lower than the response rate in the 2014 Dursley Business Survey (which was 9.8%) but it is understood that the 2023 survey covered a much wider definition of business – including a number of sole traders.

A number of follow-up interviews were then held with respondents and other businesses who had not participated in the survey.

1.6 Approach

A significant volume of data underpins this report. To ease reading:

- Information is considered thematically;
- Where-ever possible, C&D data is shown on a comparative basis –with the UK, England and occasionally Stroud District;
- Separate excel data-tables are available upon request.

2.0 THE BUSINESS SECTOR IN OUR AREA

2.1 Background: What is covered?

When considering business in the local community, it is natural to focus upon the most visible businesses operating from specialist premises – shops in and around Parsonage Street in Dursley and business units in trading estates – Draycott, Littlecombe and Wisloe.

EVERHOT Manufacturers of the most energy efficient range cookers on the market	WSP textiles Manufacturers of fine cloth for the sports and leisure industry	AvonPorts Laundry Services Commercial laundry for South West and South Wales
TJW Precision advanced engineering contractors to a range of industries	CAM Business management software for the tyre trade	RETRO Track & Air (U.K.) Ltd Engineering expertise for legacy aviation and other sectors
RVS Refuse Vehicle Solutions UK's leading provider of Remanufactured and Used refuse trucks	STONEHEALTH Specialists in the cleaning restoration and conservation of sensitive stone	SOLENTSTEVEDORES A specialist port terminal operator working throughout the UK, Channel Islands, and Singapore.
RELTECH Independent testing laboratory	cliftoncameras The leading independent digital camera dealer in the UK	Futura Foods The UK's Mediterranean cheese specialists

Figure 4: Range of Businesses in C&D

But the business sector is far more diverse. It includes businesses operating from offices above shops, from converted agricultural buildings, from residential properties (whether from the spare bedroom or a shed in the garden) or from the back of a van. In fact, only a third (32%) of businesses contacted in the Business Survey operated from what would typically be considered business premises - i.e. on the Stroud District Council Non-Domestic Rates ("NDR") register.

It is also natural when thinking of business to focus on companies. But the business community is much broader than just registered limited companies; it also includes limited liability partnerships, community interest companies, charities, sole traders and private individuals who probably do not see what they are doing as operating a business.

As a result, it is not possible to get a complete picture of businesses in an area. There will be businesses located outside C&D but which largely operate within C&D; similarly there will be businesses registered in C&D which do not have any staff or operations in the area. Businesses are starting up all the time, and, as sadly seen with the Sundela closure in 2023, they can cease trading. There will be businesses which look to advertise themselves widely, and those who, for whatever reason, would rather keep a low profile.

By using as wide a range of different data sources as possible, this report looks to provide a snapshot of businesses in C&D in the first half of 2023. Aside from official sources of business data, the report has been supported by the Business Survey, the recently released census data (which is effectively a "compulsory" survey) and interviews with businesses. It can never be perfect, but it is hopefully a valuable tool to aid decision makers in the local community.

2.2 Types of Business

Analysis of Companies House data identified 799 registered companies in the GL11 postcode area. This total included multiple companies registered at a single address, in which case they were included in the Business Survey just once.

The total number of registered companies is the equivalent to around one company for every 23 residents in C&D. This compares with around one company per 14 residents for the UK as a whole. However, the UK figure is not directly comparable as it includes a significant number of companies, particularly in London, registered as part of complex group structures.

Of the 834 surveys sent out, around 560 were sent to companies registered in C&D, the balance being sent to both companies registered outside C&D but with visible business operations in C&D and to identified sole traders.

Nationally it has been estimated that sole traders account for 56% of the business population in the UK. Despite extensive analysis on Google, including a trawl of all addresses shown on Google Maps, the Business Survey will have excluded a significant number of sole traders in C&D, but this was inevitable as there is no single source of publicly available data on sole traders.

Figure 5 shows respondents to the Business Survey were probably reasonably representative of the business community in C&D, with 57% of respondents either sole traders or self-employed.

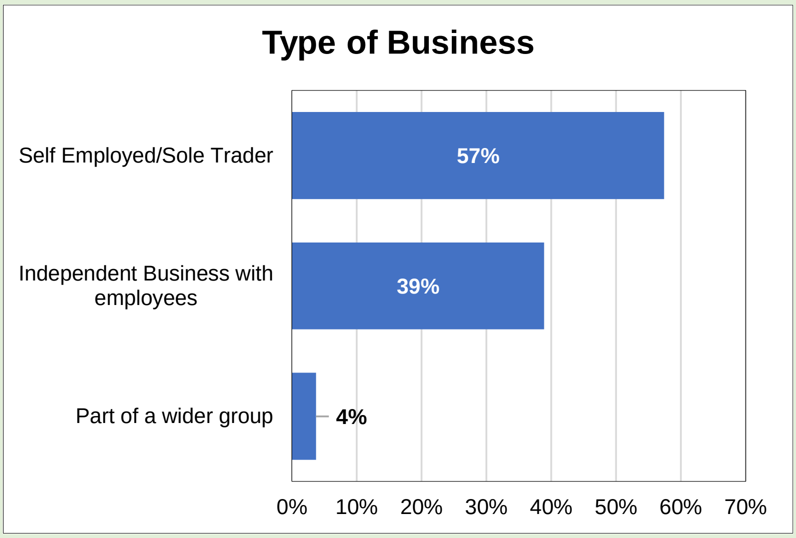

Figure 5: Business Survey respondents by business type

2.3 Business Sectors

In the UK businesses are required to identify the sector in which they operate by Standard Industrial Classification ("SIC") code. Figure 6 illustrates the largest four sectors, by registered company (Professional/Scientific/Technical, Construction, Other Service and Information/Communication) make up more than 50% of the total number of companies across C&D..

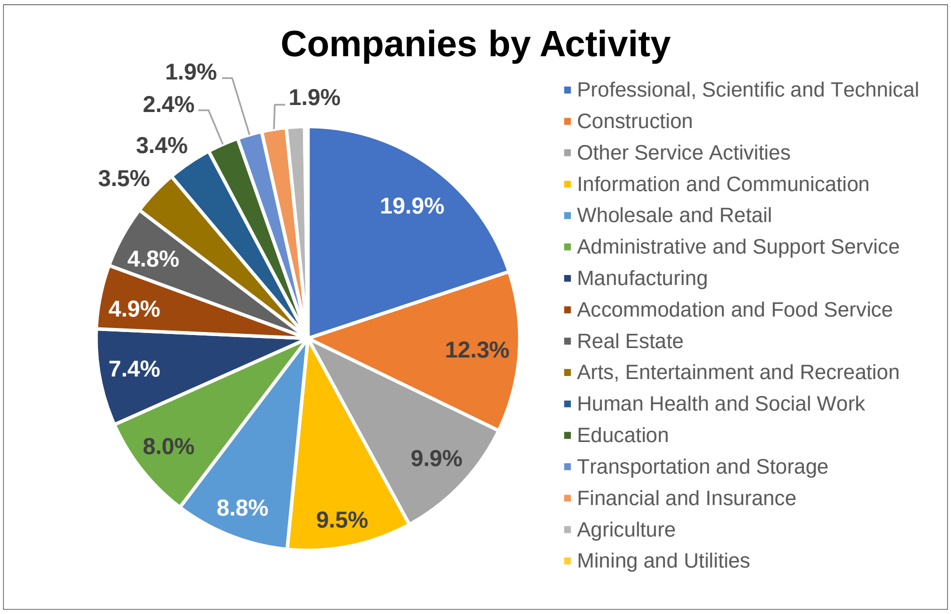

Figure 6: Registered Companies in C&D by SIC Code Source: Companies House

Above UK Average	
Professional, Scientific and Technical	4.7%
Other Service Activities	3.8%
Information and Communication	3.2%
Manufacturing	2.6%

Below UK Average	
Construction	-4.1%
Transportation and Storage	-3.7%
Education	-3.0%
Human Health and Social Work	-2.7%

Figure 7: Registered Companies in C&D by SIC Code compared with UK   Source: Various

Figure 7 compares this local split of SIC codes with the UK as a whole. C&D can be characterised as having an above average number of professional, scientific, IT type service companies and, notwithstanding the closure of much of its manufacturing, retains a greater emphasis on manufacturing than the UK average.

Meanwhile, the number of locally registered construction companies is 4.1% below the national average.

Employment data for C&D from the 2021 census (Figure 8) shows a quite different sectoral mix.

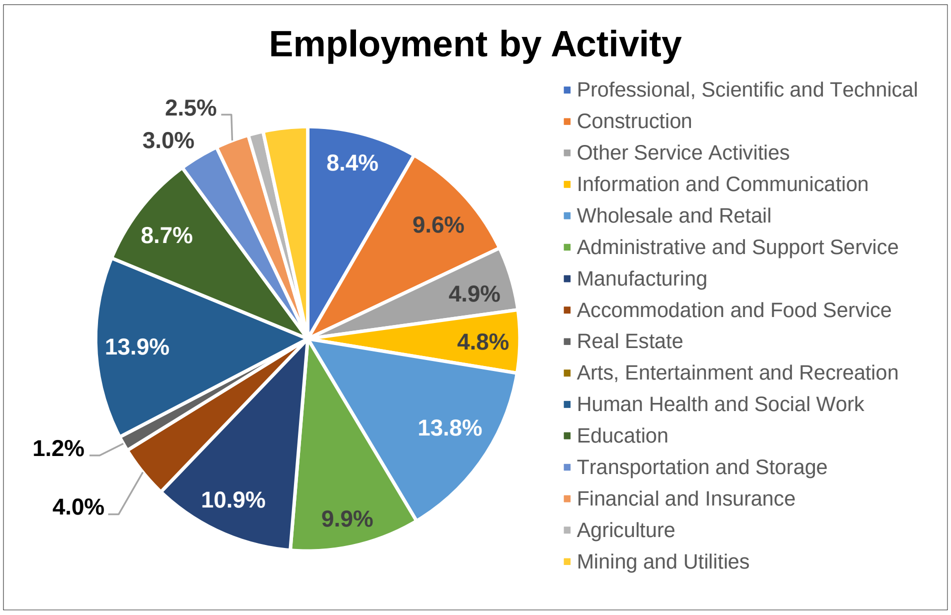

Figure 8: Employment in C&D by SIC Code   Source: 2021 Census

Figure 9 highlights the significant difference between business data and employment data. For example, whilst just under 20% of companies registered in C&D operate in the Professional, Scientific and Technical sector, this sector only accounts for 8.4% of employment. This is because a significant portion of the companies in this sector are very small, often with a single employee. At the other end of the scale, the majority of those employed in Education and Human

Health/Social Work (together 22.6% of the population) are employed by the public sector and so not captured in business data.

The focus of this report is primarily on businesses.

	Share of Employment	Share of Companies	Difference	
Professional, Scientific and Technical	8.4%	19.9%	-11.5%	Small businesses, often single employees
Other Service Activities	4.9%	9.9%	-5.0%	
Information and Communication	4.8%	9.5%	-4.7%	
Real Estate	1.2%	4.8%	-3.6%	
Arts, Entertainment and Recreation	0.0%	3.5%	-3.5%	
Construction	9.6%	12.3%	-2.7%	
Accommodation and Food Service	4.0%	4.9%	-0.9%	
Agriculture	1.1%	1.4%	-0.2%	
Financial and Insurance	2.5%	1.9%	0.7%	
Transportation and Storage	3.0%	1.9%	1.1%	
Administrative and Support Service	9.9%	8.0%	1.9%	
Mining and Utilities	3.4%	0.3%	3.1%	Public sector and large corporations - eg supermarkets
Manufacturing	10.9%	7.4%	3.5%	
Wholesale and Retail	13.8%	8.8%	5.1%	
Education	8.7%	2.4%	6.3%	
Human Health and Social Work	13.9%	3.4%	10.5%	

Figure 9: Differences between companies and employment

Figure 10 shows the Business Survey responses by sector. Whilst the Business Survey covered a wide range of sectors and, just as for company data in Figure 6, the Professional, Scientific and Technical sector is the largest in C&D, the relatively small sample size in the Business Survey means that care is needed not to over-emphasis Business Survey responses without supporting evidence from other data sources.

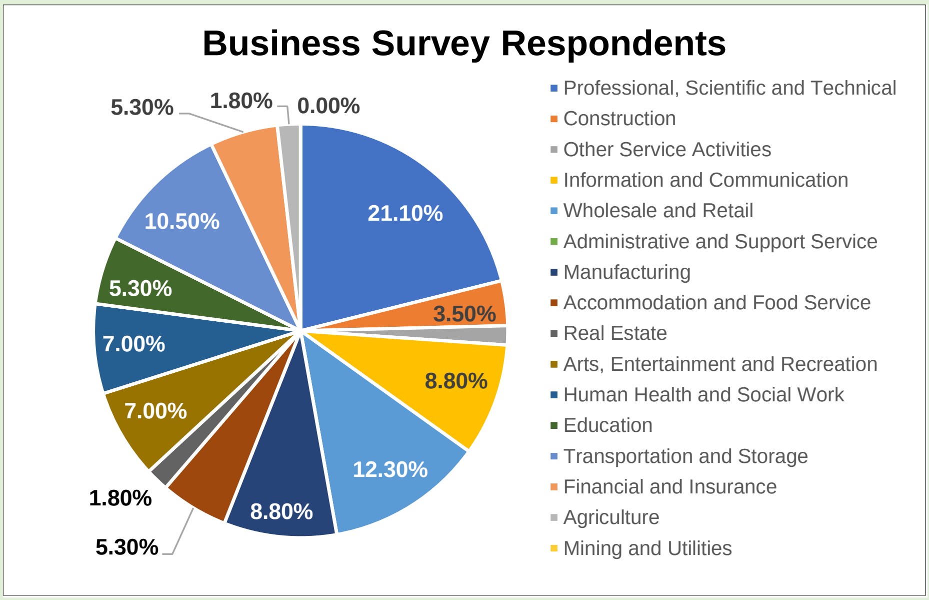

Figure 10: Business Survey respondents by SIC Code Source: Business Survey

2.4 Business History and Start Ups

Across the UK the average age of registered companies is 8.5 years, in C&D it is 10.8 years. This is in large part due to fewer new companies being incorporated – in the UK in 2022 15.4% of businesses had been incorporated in the previous 12 months. In C&D, new businesses represented only 10.4% of the total, 5% lower than the national average.

The demography of C&D, when compared with that of bigger, more youthful urban areas, means that such statistics are not particularly surprising.

Figure 11 compares the age profile of registered companies in C&D and compares this with the date at which businesses were first recorded as operating at a specific address on the NDR register and Business Survey respondents.

Apart from a different split for business over 11 years old, in terms of business age the Business Survey respondents are generally representative of companies in C&D. What is, however, noticeable, is how proportionately fewer new businesses (i.e under 4 years of age) do not appear on the NDR register. This is considered further in the next section of the report.

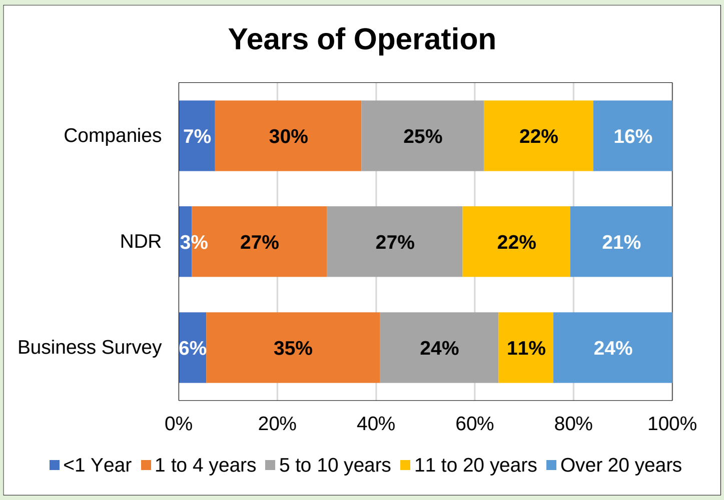

Figure 11: Years in Operation in C&D Source: Various

2.5 Business Size

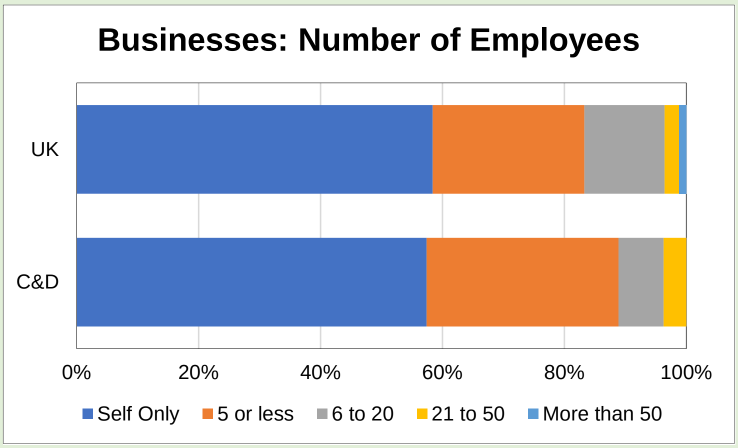

Figure 12: Company Size Source: Business Survey, Statista, ONS

Figure 12 compares the number of employees reported by respondents to the Business Survey with the UK average. As can be seen, once again survey respondents are broadly representative of the wider market save for an absence of responses from the largest (>50 employee) companies – for which there was no response in the survey.

Respondents to the Business Survey were requested to indicate their annual sales across 8 different bandings from less than £10,000 to over £2.5million. There were responses in all bands with the largest response (38%) being £10-£50,000 per annum. This is consistent with the data Figure 12 which shows the majority of survey respondents had one employee.

3.0 PROPERTY AND PREMISES

3.1 Background

As highlighted in Section 2 only a third (32%) of businesses contacted in the Business Survey operated from what would typically be considered business premises - i.e. on the Stroud NDR register.

This was reflected in survey responses in which 59% of respondents worked from home and only 29% operated from premises likely to be included on the NDR register.

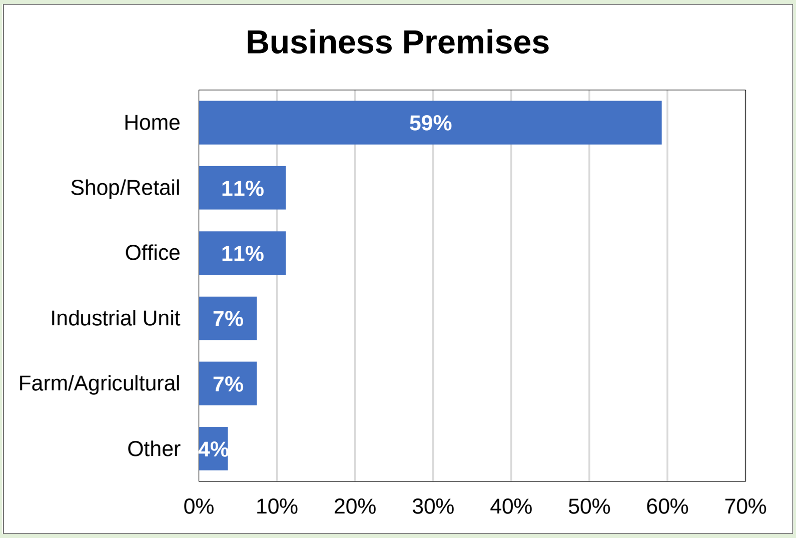

Figure 13: Business Premises Source: Business Survey

For those public sector organisations responsible for land use planning (including Gloucestershire County Council and Stroud District Council), much of the focus has been the provision/availability of suitable "traditional" business premises. This section of the report considers the potential implications of the changing nature of business and work.

3.2 Employment Land in C&D

There are currently three allocated Employment Areas in C&D (out of 46 in Stroud District Local Plan).

- Draycott/Middle Mill Industrial Area (21.94 Ha)
- Cam Mills (2.25Ha)
- Littlecombe Business Park (3.78Ha)

Figure 14: Draycott/Middle Mills Source: Cam Neighbourhood Plan

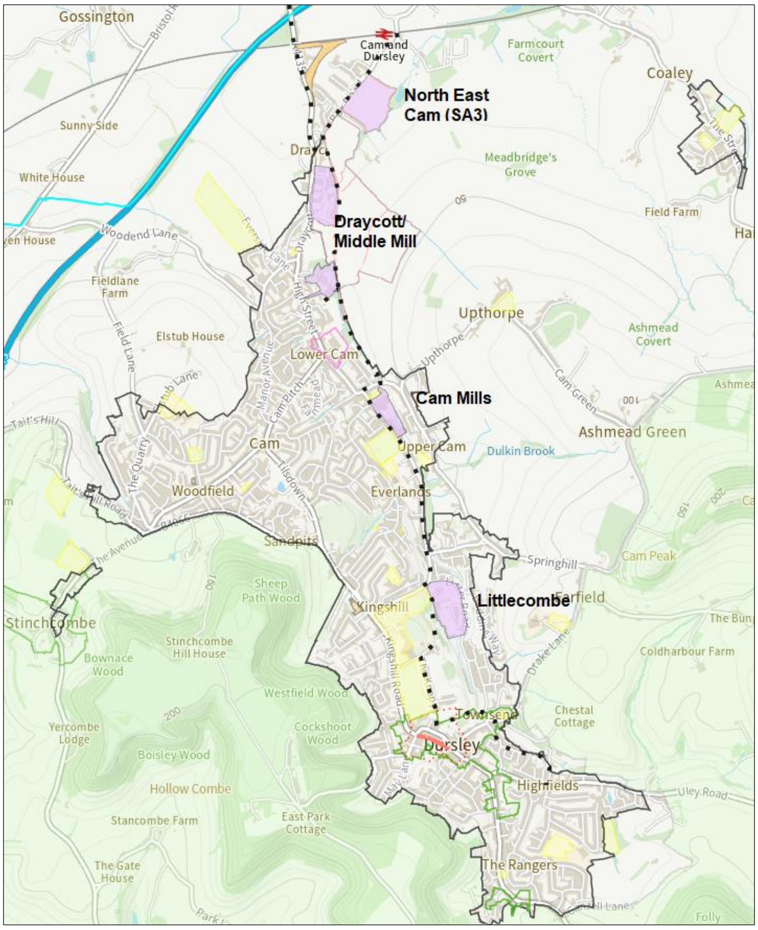

Figure 15: Employment Land – Stroud Local Plan

The **Stroud District Employment Land Review** (dated March 2021) noted that *"Cam/Dursley have a strong local industrial market, which has recently seen the* *strong take up of freehold units at Littlecombe Business Park. The local office market appears negligible".*

The review also noted that *"the impacts of Covid-19 are likely to include a greater proportion of people working from home permanently, but what level of impact this will have on demand for employment land and property is impossible to estimate at this stage".*

The review identified North East Cam (SA3) (shown in Figure 15) as main source of additional employment land for Cam/Dursley with strong evidence of its deliverability. The expectation of the review was that development would most likely be for industrial or warehouse uses and that whilst office development was possible, it was unlikely given the modest scale of the local market.

3.3 Locating Businesses in C&D

Figure 16 highlights the reasons identified by Business Survey respondents for locating their business in C&D.

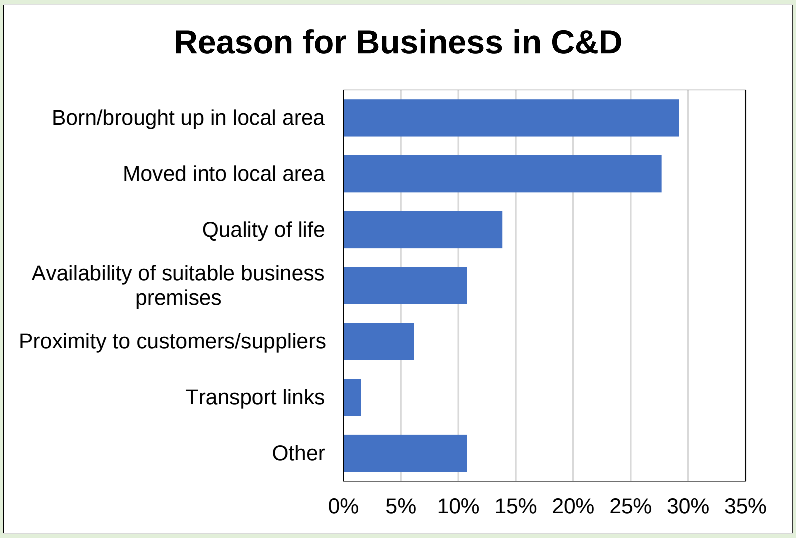

Figure 16: Reason for locating business in C&D Source: Business Survey

It is not surprising that the key reasons for locating a business in C&D was simply because the respondents were already in the local area. 11% of respondents referred to the availability of suitable business premises as being a driver.

The Business Survey would therefore suggest that the availability of suitable premises is not a particularly significant issue. However, given that 59% of Business Survey respondents work from home (and so the availability of premises is not necessarily as significant a matter) this is a relatively high figure. In subsequent Business Survey questions (see Section 5) access to suitable premises was seen as a short term to medium term concern for a significant number of those businesses which were not home based.

3.4 Commercial Property in C&D

Within C&D there are 465 premises on the NDR register of which 164 are identified as shops and retail, 98 as workshops/warehouses (i.e. "industrial unit" type locations) and 67 are registered as offices.

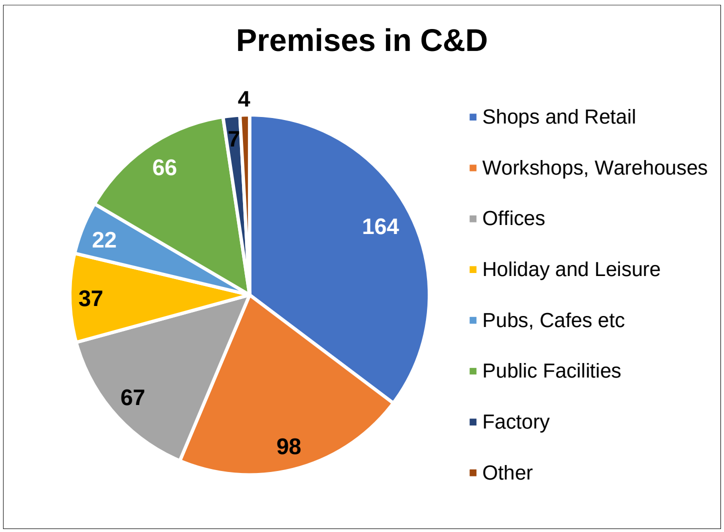

Figure 17: Commercial Property Types in C&D Source: NDR

Using the data in Figure 17, at the end of June 2023 a review was undertaken across a range of national property websites (Zoopla, Rightmove) and websites of local commercial property agents in order to provide an estimate of the vacancy rates for the different commercial property types in C&D. Whilst such an assessment can only ever be an estimate (not all vacant premises are necessarily publicised) it helps to provide a indicative "snap-shot" of the property market

Figure 18: Commercial Vacancy Rates in C&D Source: Engine Research

The results are shown in Figure 18 – suggesting that "industrial unit" type properties are in the shortest supply.

Offices

As the Stroud District Employment Land Review noted, with increased home working (see Section 3.5) demand for offices in C&D remains relatively weak. As at the end of June 2023 5 office units were being marketed (an availability of around 7% of the total) with two further relatively large office premises (WSP and Azets) expected to come to market in the near future.

Shops and Other Retail

As Figure 19 shows, despite an improvement in 2022, across the South West as a whole, closure of retail outlets exceeded openings.

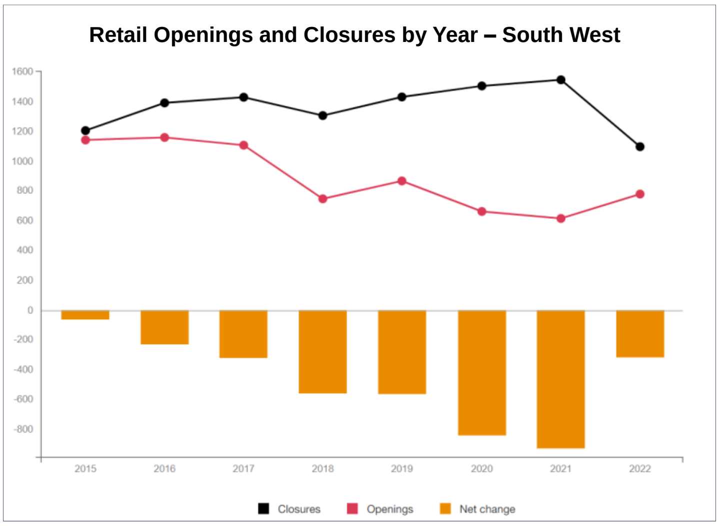

Figure 19: Retail Opening and Closure – South West Source: PwC

Locally, Stroud DC has access to town centre footfall data for various town centres in the district including Dursley.

In the 7 month period January 2023 to July 2023, total footfall in Dursley was just over a million – or the equivalent of an average of 4,800 people per day (including Sundays). This makes Dursley the second largest town in the district – with the footfall in Stroud being three times greater.

Encouragingly, data suggests that **footfall over the period January to July period was 10.1% higher than over the same months in 2022**. In Stroud district, only Nailsworth saw a greater growth. Snapshot data over the longer period of 2019-2023 for May to July also shows a positive trend – **with footfall in Dursley in 2023 was up 2.2% over 2019** whilst all other towns in the district (except Nailsworth) saw a fall in footfall over the last 4 years.

In C&D the first seven months of 2023 saw a significant number of retail closures, including long and well established businesses such as Hummingbird Café and The Filling Station as well as several more recent start ups.

However, new businesses continue to develop and take over vacant retail space, particularly on or close to Parsonage Street. Newcomers include Indie's Deli and Cosiminis, whilst the former flower shop (the venue for the Engine's first escape room) has also undergone major refurbishment and is currently seeking a tenant.

A further positive sign has been the way in which business continuity has been achieved and the range of shops maintained. In the period this report was being prepared two specialist Parsonage Street businesses, the card shop and sweet shop changed ownership – as did the fish and chip shop in Cam. Others changed ownership in this period too.

However, whilst the national Domino's pizza franchise has just located in Kingshill, there are signs that finding tenants for some retail premises, particularly away from Parsonage Street, is more challenging and that some form of change of use may be necessary.

Overall the regular "churn" of retail premises means that there is always some availability on the market. As at the end of June a total of 10 retail premises were identified as vacant – representing an availability of 6% of the total stock of retail premises in C&D.

Workshops/Warehouses/Factories

Location	Number
Draycott	26
Littlecombe	16
Wilsoe	11
Taits Hill	9
Cam Mills	2
Other locations	41
Total	**105**

Figure 20: Location Workshops/Warehouses/Factories in C&D Source: NDR

As Figure 20 shows, whilst almost 60% of the workshops/warehouses/factories in C&D are located in employment areas (as described in Section 3.2), a significant portion of these units are located elsewhere in C&D.

NDR returns also highlight that a number of larger C&D businesses occupy multiple units at these locations and so the number of businesses actually operating from these units is much less than 105.

From discussions with local commercial property agents, there remains a strong demand for suitable units, particularly the smaller ones which are particularly attractive to start-ups and or home businesses which have out-grown their spare bedroom or garage. Such units are generally taken up relatively quickly. Rental prices in C&D are broadly in line with the wider South West.

The available evidence would confirm a strong local market for these facilities, at the end of June 2023 there were just 3 facilities on the market representing an availability of 3% of the total.

3.5 Working from Home/Home Based businesses

Since the COVID-19 pandemic, across the UK there has been a significant rise in the level of home working. At the time of the 2021 census, nationally 40% of the workforce were working from home, in C&D the figure reported on the census was almost identical – at 39% (up from 12% in 2011).

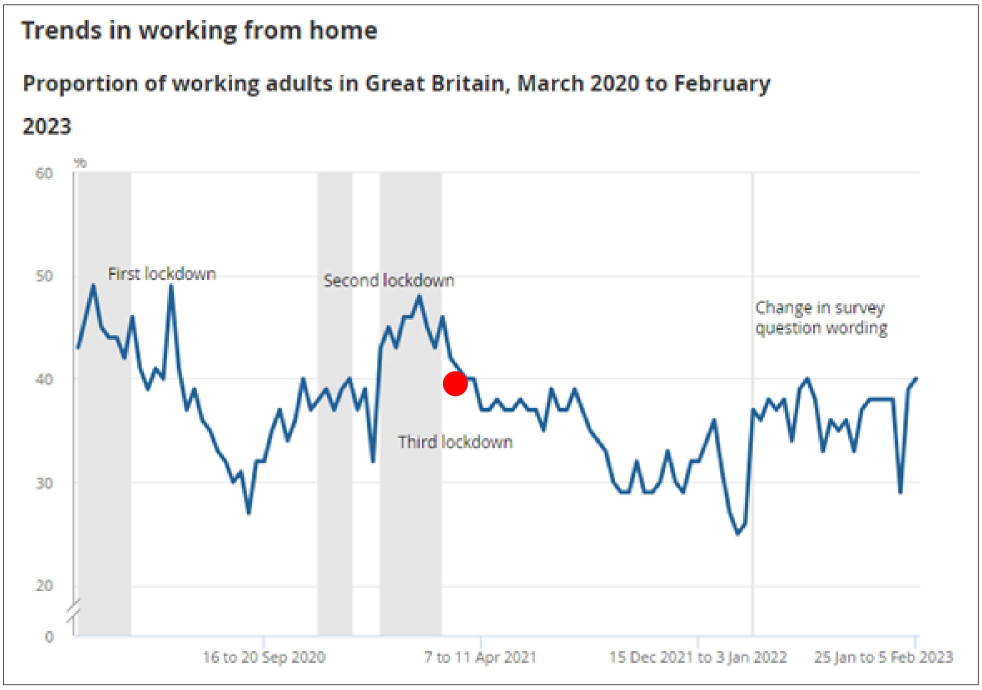

Figure 21: Trends in Working from Home Source: ONS

Based on employment data and recent estimates of the levels of homeworking by employment type from the CIPD, it is estimated that by June 2023, home working in C&D had dropped to 28%, around 5% below the underlying UK average.

3.6 Co-Working Space

The changing pattern of work, with increased home-working, has led nationally to the development of more than 6,000 co-working spaces in the UK. These spaces aim to support the more hybrid means of working, providing places for those unable or unwilling to work alone at home as well as meeting rooms and network opportunities. Until the pandemic there was no provision of such spaces in C&D.

In early 2023, Focus, a new, relatively large co-working space was opened at Drake House in Dursley.

The facility offers a range of packages for co-workers as well as meeting rooms, kitchen facilities, showers and high speed WiFi.

4.0 THE LABOUR MARKET

The 2021 Census provides a uniquely detailed and timely source of information.

4.1 Demographic Data

	Cam East	Cam West	Coaley and Uley	Dursley	Total	Stroud
2021	4,443	4,078	2,436	7,463	18,420	121,104
2011	4,134	4,028	2,299	6,697	17,158	112,779
Change	*7.5%*	*1.2%*	*6.0%*	*11.4%*	*7.4%*	*7.4%*

Figure 22: Population Changes 2011 – 2021 Source: Census

In the period 2011 – 2021 the population across C&D increased by 7.4%, a similar figure to Stroud District as a whole. However there has been some significant differences in growth between the four wards with Dursley seeing the highest growth (at 11.4%)

Over the last 10 years the average age of the population across C&D increased from 42.4 years to 44.1 years. This is greater than the UK average of 40.7 years and consistent with a relatively aging population in C&D.

4.2 Education

Over the 10 year period 2011 - 2021 there has been a clear increase in the minimum level of qualifications across C&D with the percentage of residents without qualifications falling from 21% to 15% and for those with Level 4 (i.e. degree or equivalent) rising from 29% to 35%.

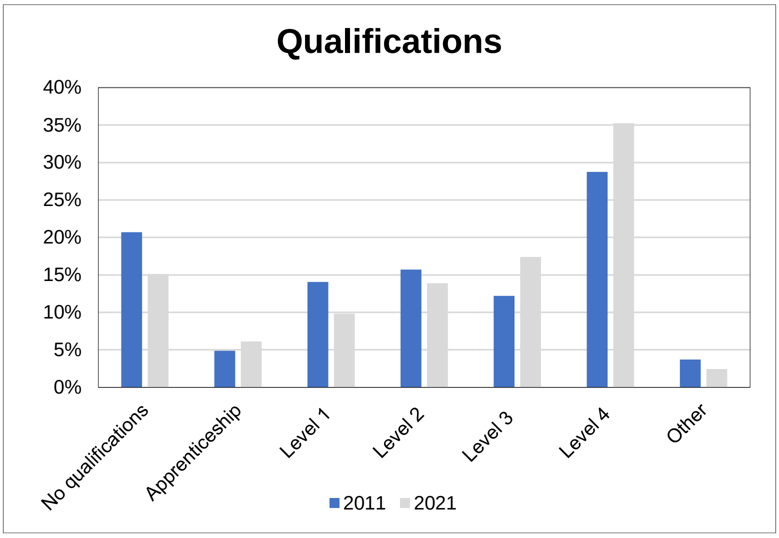

Figure 23: C&D Qualifications 2011 – 2021 Source: Census

As Figure 24 shows, in comparison with the UK as a whole, C&D has proportionately more residents with a Level 2 qualification or above than the national average (69% vs 59%).

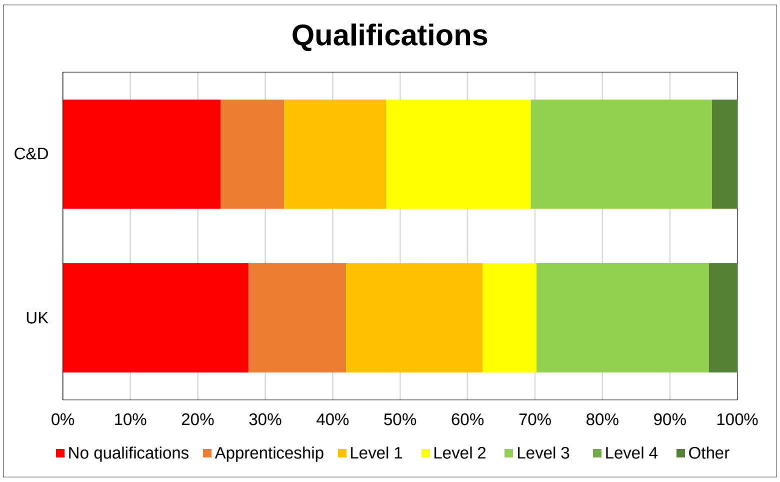

Figure 24: 2021 Qualifications: C&D vs UK Source: Census

4.3 Economically Active: The Labour Market

	Cam East	Cam West	Coaley and Uley	Dursley	Total	Stroud
2021	2,171	2,072	1,199	3,777	9,219	62,038
2011	2,110	2,072	1,200	3,507	8,889	59,980
Change	*2.9%*	*0.0%*	*-0.1%*	*7.7%*	*3.7%*	*3.4%*

Figure 25: Economically Active

Overall between 2011 and 2021 the number of "economically active" residents across in C&D rose by 3.7% - significantly below the rise in population. Within this, Coaley and Uley has seen a fall in economically active residents and yet a 6% rise in population.

Excluding residents who are retired (for which data between the two Census is not directly comparable), across C&D there was a 21.3% increase in those not economically active.

	Long Term Sick or Disabled	Looking after Home/ Family	Student	Other	Total
2021	485	562	436	308	1,791
2011	395	504	420	157	1,476
Change	*22.8%*	*11.5%*	*3.8%*	*96.2%*	*21.3%*

Figure 26: Not Economically Active

At the time of the 2021 census, the total number of unemployed and seeking work across C&D was 316 (2011: 382), equivalent to an unemployment rate (based on the total number of economically active residents) of 3.4% (2011: 4.3%).

Over the same period Stroud district as a whole saw its unemployment rate fall more modestly from 3.8% to 3.4%.

More recent Government data suggests that in June 2023 Stroud had the fourth lowest proportion of jobseekers across 309 local authorities in England (1.6%). This suggesting a particularly tight labour market in the district as a whole and there is little reason to assume employment rates in C&D will be significantly different to those for the district.

4.4 Employment and Occupations

Figure 27 shows employment by sector for C&D based on the 2021 census.

As can be seen from Figure 27, over the 10 year census period there have been some significant changes in the sectors in which C&D residents are employed. Employment in electricity supply and manufacturing sectors have fallen (the latter it is assumed is a reflection of changes at Berkeley and Oldbury power stations).

Greatest Increases	
Information and Communication	34.1%
Professional, Scientific and Technical	32.4%
Human Health and Social Work	25.4%
Construction	19.2%

Greatest Falls	
Electricity, gas etc	-38.3%
Manufacturing	-25.7%
Finance and Insurance	-11.7%
Education	-4.8%

Figure 27: Changes in Employment by Sector Source: Census

Meanwhile significant increases in employment have been seen in Information and Communication (which includes IT) and in professional services/activities.

The census also gives significant data with respect to the nature of the work within these industries. As Figure 28 shows, the decline in manufacturing has led to a decline in the number of process, plant and machine operatives, whilst increased use of IT appears to have led to a decline in administrative and secretarial functions. The greatest area of growth appears to have been in the more management level roles.

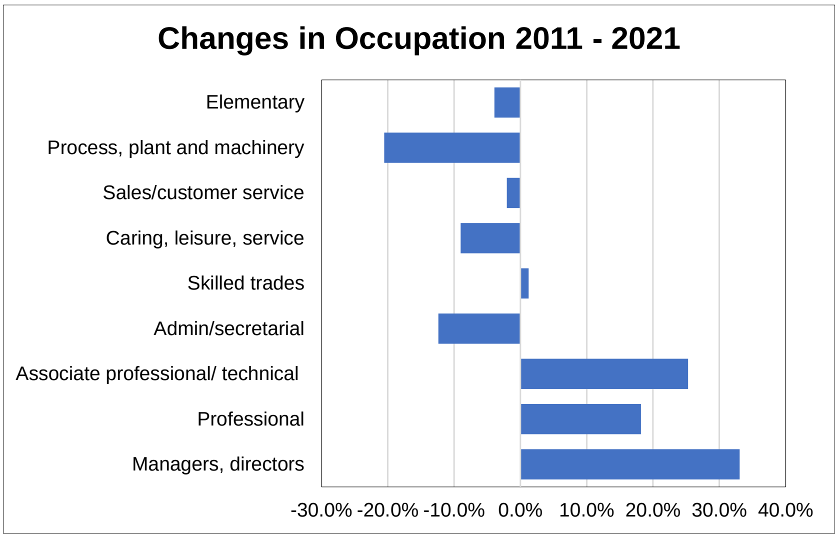

Figure 28: Changes in Occupation 2011 - 2021 Source: Census

Perhaps somewhat surprisingly, the census data suggests little change in the hours worked between 2011 and 2021. 11% of the C&D workforce reported that they worked less than 15 hours per week, 20% reported 16 to 30 hours a week, with 59% working up to 48 hours a week and 10% working more than 48 hours per week.

5.0 BUSINESS SURVEY INSIGHTS

This section of the report provides specific insights from respondents to the Business Survey.

5.1 Customer Location

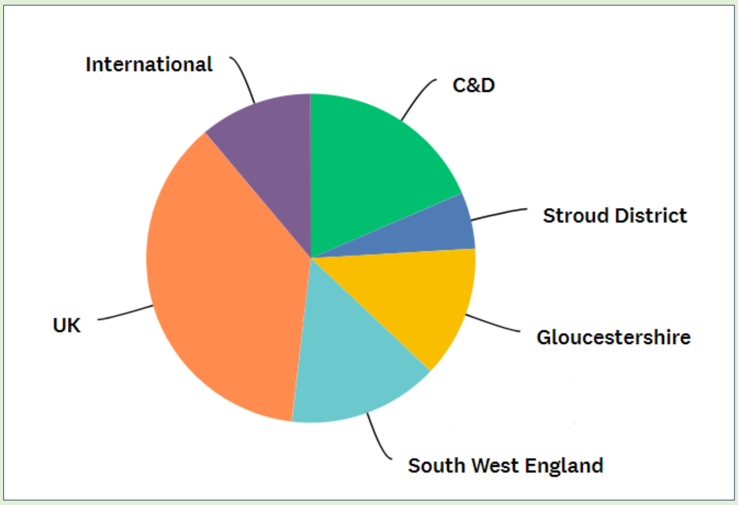

Figure 29: Customer Location Source: Business Survey

Figure 29 highlights the customer locations for the Business Survey respondents with 48% of respondents identifying that their customers came from UK or International. This is a relatively wide geographical spread particularly given the relatively small scale of many of the respondents and would suggest businesses involved in the provision of niche products/services via mail order/virtual working.

5.2 Sources of Business

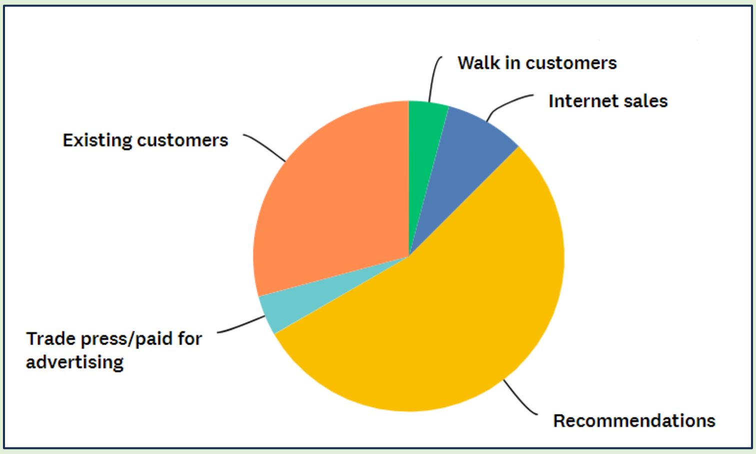

Figure 30: Source of Business Source: Business Survey

As Figure 30 shows, a significant portion (54%) of business for respondents comes from recommendations and just 8% from internet sales. This is consistent with businesses engaged in the provision of niche products/services.

5.3 Sales and Profitability

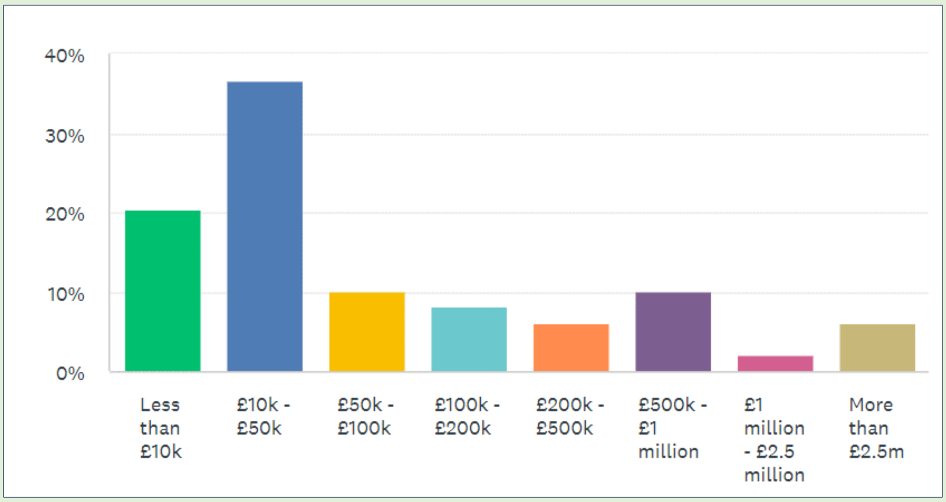

Figure 31: Annual Business Sales Source: Business Survey

Figure 31 shows the current annual sales for respondent. 56% of Business Survey respondents had sales of less than £50kpa. Not unsurprisingly this is the same percentage as the number of businesses with only one employee.

Figure 32 shows the reported profitability. It is notable that 53 of the 54 surveyed businesses responded to the profitability question.

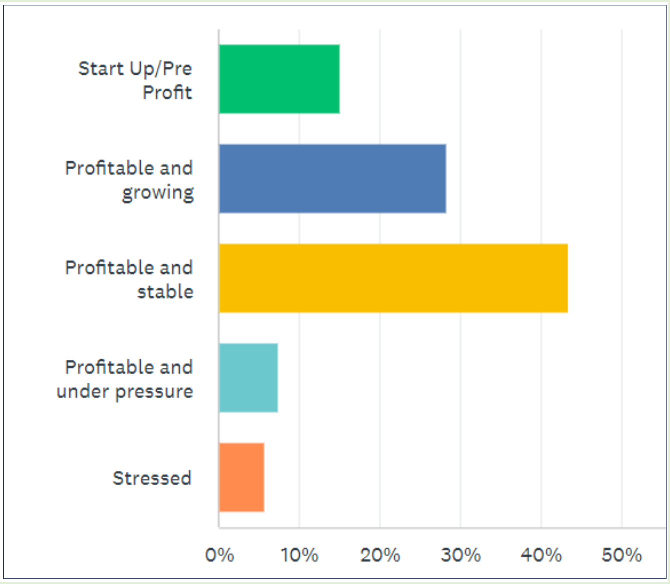

Figure 32: Business Profitability Source: Business Survey

The profile of business profitability is as might be expected, with an approximately normal distribution across the profitability types. It is not easy to draw too many inferences from a one off Business Survey; a series of responses over time is likely to be much more insightful as to the state of business in C&D.

5.4 Business Concerns

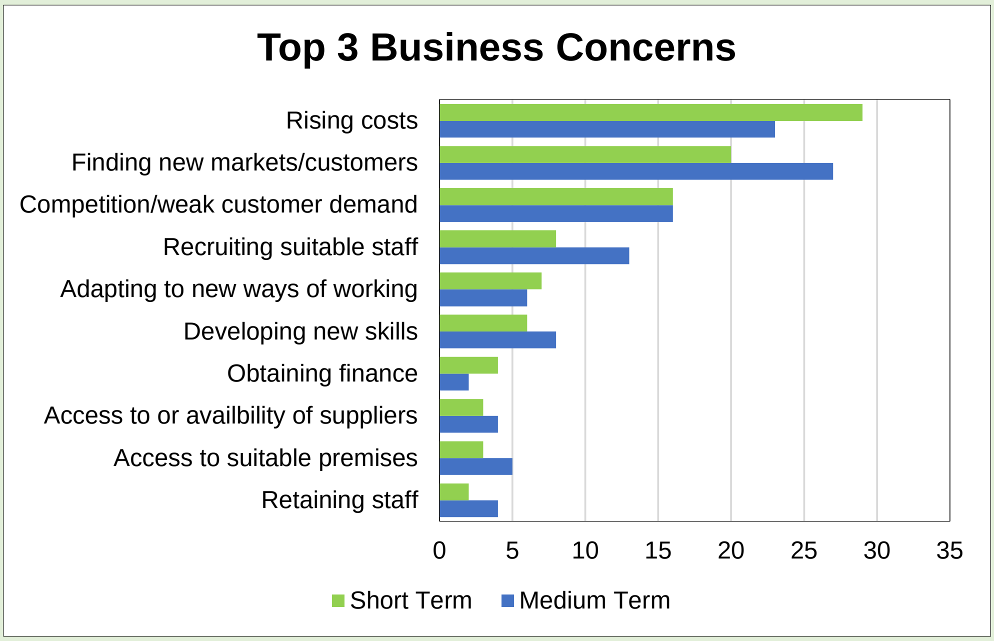

Figure 33: Business Concerns Source: Business Survey

Figure 33 shows the Business Survey respondents' top three concerns in both the short and medium term. Not unsurprisingly concerns around rising costs and competition/weak customer demand are near the top of the list, reflecting wider uncertainty around the UK economy.

Finding new markets is more of a medium term concern (a theme which is repeated in Section 5.5). So too is staff recruitment. Given the low level of unemployment in Stroud District (See Section 4.3) it is perhaps surprising that this figure is not higher. However, it must be recognised that only 43% of respondents to the Business Survey currently employ staff (23 businesses) – but of these 13 (56%) of respondents saw staff recruitment as a medium term business concern with a further 4 (17%) concerned about staff retention.

Further to Section 4, access to suitable premises was only a concern for a limited number of respondents.

Aware of the limited number of responses from larger businesses, an interview was arranged with one C&D's largest employers who employ a total of 100+ staff. They identified significant local recruitment challenges. The interviewee went as far as to suggest that *"people around [C&D] don't seem to want to work"* and that, in order to fill vacancies, they had started to recruit from further afield, including internationally. This, however, has proved to be challenging, in large part due to the lack of private rental accommodation available in C&D.

The issue of recruitment was strongest in discussion with interviewees. Several themes emerged. For small businesses with few employees, the critical importance of making the "right" recruitment. This was not just about finding someone locally with the right skill set, but also finding someone whose availability for work met the business needs – particularly in the service sector.

5.5 Business Support

The Business Survey included three questions specifically targeted at understanding the support needs of businesses in C&D.

Figure 34: Sources of Business Advise Source: Business Survey

The first question, Figure 34, asked where respondents would seek business support. Interestingly, no single particularly strong source of advice emerged from across the 9 options offered.

The Growth Hub is a Gloucestershire County Council initiative to provide free support to businesses and organised at a district level with contact points embedded into the Council's 31 libraries – including Dursley. The level of support varies from library to library.

It is also noted that there are few local sources of professional advice. No doubt the closure of local banks has had an impact, as has the limited number of accountants based in C&D; which continues to decline with the recent relocation of Azets to Quedgley. It is similarly the case with lawyers - the recent departure of WSP from C&D means that there is only one group of solicitors registered with the Law Society based in C&D (Red Kite Law LLP).

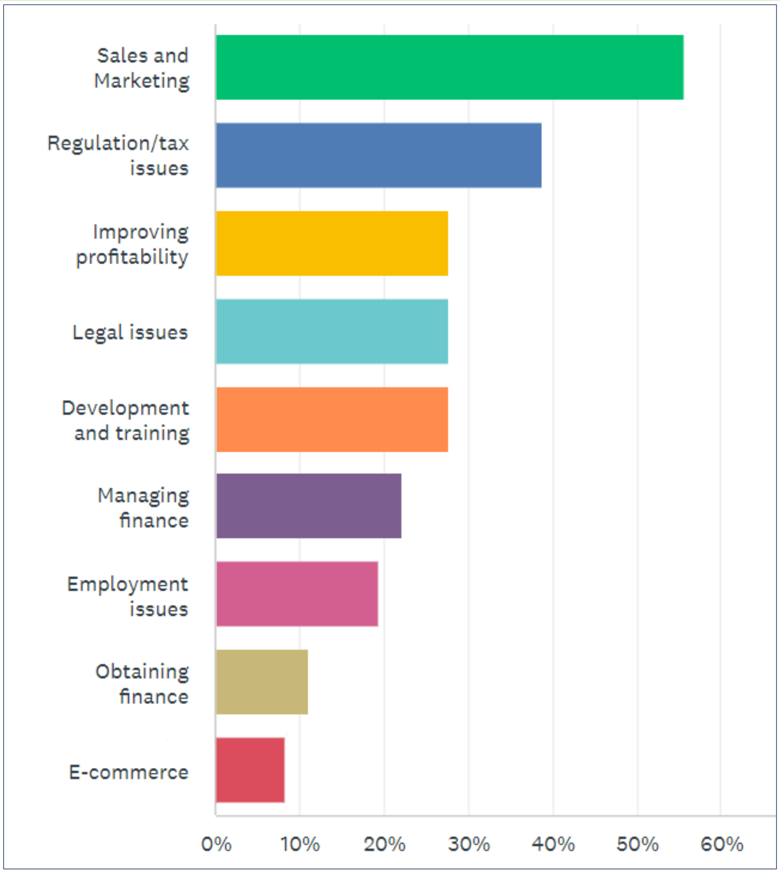

Figure 35: Topics for previous advice   Source: Business Survey

The second question, (Figure 35) asked respondents to identify those areas in which they had received advice in the past. Sales and marketing was particularly significant, being identified by 55% of respondents. The Business Survey appears to highlight this as a particular theme, as with finding new markets/customers was also a key concern raised in Section 5.4.

The next question was much more widely drawn and asked respondents what would help them most to develop their business. Top of the list was a desire for improved marketing of C&D as a place to do business, followed by the creation of a local business forum.

Choice	Response
Improved marketing of C&D as a place to live and do business	45%
Local business support group/forum	38%
Improved broadband	27%
Access to local banking	27%
Improved mobile phone coverage	25%
Better access to local training	16%
Better public transport links	14%
Access to suitable premises	11%
Better availability of co-working spaces	5%

Figure 36: Areas of need for local business development   Source: Business Survey

Some caution is needed not to over-interpret these results, as respondents to the Business Survey are, to some extent, likely to self-select, being individuals or organisations keen to promote and develop the local business community.

The third item on the list, the requirement for improved broadband speeds, is reflected in 2022 data which highlighted only 17% of GL11 has access to full fibre broadband compared to nearly 33% in Stroud District as a whole and 40% for England. With the roll out of Gigaclear this is expected to improve over the next few years.

2022	<10 Mbit/s	>10 Mbit/s	>30 MBit/s	Up to 300 Mbit/s	Giga Bit Capable	Full Fibre
England	1.0%	99.0%	96.0%	28.0%	70.0%	40.0%
Stroud	1.5%	98.5%	92.8%	66.0%	33.6%	32.7%
GL11	0.3%	99.7%	96.3%	82.9%	17.0%	17.0%

Figure 37: Access to Broadband – 2022 Source: Ofgem

The desire to have access to more local banking is also not surprising in the light of the closure of all banks in C&D.

5.6 Environmental Matters

The final question in the Business Survey sought to understand respondents' plans to reduce their environmental impact over the next 12 months. 41% suggested that one of the measures they were considering was to reduce waste, and 37% to reduce energy, but 37% of respondents suggested that they had no plans to reduce their environmental impact.

6.0 EXECUTIVE SUMMARY AND CONCLUSIONS

6.1 The Cam, Dursley and Surrounds ("C&D") business survey has been prepared in order to provide an up-to-date baseline of the current local business "demographics" against which future local economic development can be assessed, help identify any local business support needs and to assess the potential value of local business support.

6.2 The report has drawn its analysis from responses both to an online Business Survey but also to a wide range of publicly available data sources. By combining these sources the resultant analysis is as robust as possible and includes a local business database with over 1,200 lines of data.

6.3 There are in excess of 800 business in C&D, but only a third operate from what would typically be considered business premises – workshops, warehouses, shops, offices etc and around 56% have a single employee, many of whom work from home.

6.4 Historically, when considering local business needs, the focus has typically been on the adequacy of the provision of suitable premises for "traditional" businesses. The changing nature of business, accelerated by COVID-19, means that this is arguably of declining importance.

6.5 Despite the regular business "churn" (i.e. start-ups replacing closures), demand for retail and office space would appear to be in decline with reasonable availability of vacant premises in C&D. Demand for smaller industrial units remains relatively strong, with demand from start-ups but also from those working from home who have outgrown their spare bedroom/garage.

6.6 C&D can be characterised as having a relatively large number of professional, scientific, IT type service companies and, notwithstanding the closure of much of its large manufacturers in recent years, continues to see a greater proportion of manufacturing than the UK average.

6.7 The local employee market is a little older than the UK as a whole but better qualified; C&D has proportionately more residents with a Level 2 qualification and above than the national average (69% vs 59%). Larger employers highlighted the challenges in finding staff, which is not unsurprising in that national data suggests Stroud has one of the lowest proportion of jobseekers across local authorities in England.

6.8 54 responses were received from the online Business Survey, and aside from companies with more than 50 employees, the demographics of respondents were broadly in line with other data relating to businesses in C&D.

6.9 The Business Survey responses highlighted that, despite their generally small scale, nearly half of respondents served markets outside the South West region and despite concerns around cost pressures and potentially weak customer demand (due to economic uncertainties), most were doing financially ok.

6.10 What emerged from the responses was that most businesses in C&D had a strong personal link to the local area and had a need for greater local business support, particularly around sales and marketing. Whilst caution is needed in interpreting the data (Business Survey respondents may have completed the survey in part to benefit their own business), this is consistent with the relatively limited local professional advice available for a community as big as C&D.

6.11 The preparation of this report has highlighted several key themes relevant to The Engine Hub CIC and its strategic objectives:

(a) Supporting and connecting local businesses to help them thrive and grow;

Recommendation: *Whilst there appears to be interest in an informal business forum for C&D, such a forum would need to be of value to local businesses. This is best achieved through combining the opportunity to learn with an opportunity to network. The Engine Hub CIC to arrange a trial series of lunches based on developing marketing skills whilst providing the opportunity to meet other businesses over an informal lunch. If a success, informal research will provide input for subsequent topics.*

(b) Providing education and training so as to give local businesses and residents the opportunity to gain skills, develop opportunities and be inspired;

Recommendation: *The Engine Hub CIC to continue to actively develop links with local education establishments and provide advice and support to businesses including through the provision of the Team Radar.*

(c) Providing leadership and mentoring opportunities through developing successful local social enterprises.

Recommendation: *The survey did not identify any specific needs but The Engine is continuing to seek suitable opportunities alongside the Escape Room through developing community owned businesses that benefit our locality.*

APPENDIX 1 – BUSINESS SURVEY QUESTIONS

Thank you for taking time to complete this survey.

All information will be kept confidential and individual businesses will not be identified

1. About the Business

Business Name

Postcode

Website

Facebook

2. About You

Name

Role

Email Address

Phone Number (Optional)

3. Location of Business

- ○ Cam
- ○ Dursley
- ○ Coaley
- ○ Uley
- ○ Stinchcombe

4. Business Premises

- ○ Home
- ○ Specific Business Premises - office/shop/business unit etc

5. Nature of Premises (not applicable for home based businesses)

- ○ Owned
- ○ Leased
- ○ Rented

6. Type of Premises (not applicable to home based businesses)

- ○ Office
- ○ Shop/Other Retail
- ○ Industrial Unit
- ○ Farm/Agricultural Premises

Other (please specify)

7. When you chose to locate your business in the local area, which of the following influenced your decision?

- [ ] I was born/brought up in the local area
- [ ] I had moved into the local area
- [ ] Availability of suitable business premises
- [ ] Proximity to key customers/suppliers
- [ ] Transport links
- [ ] Quality of life
- [ ] None of the above

8. What type of business are you?

- ○ Agricultural
- ○ Food and Drink Manufacturing
- ○ Other Manufacturing
- ○ Construction
- ○ Retail and Wholesale
- ○ Transport and Logistics
- ○ Computing, Technology and Communication
- ○ Accommodation, Food and Hospitality
- ○ Finance and Insurance
- ○ Property
- ○ Professional, Scientific, Technical
- ○ Administration
- ○ Education
- ○ Health Services
- ○ Charity

Other (please specify)

____

9. How long have you been operating in the local area

- ○ Less than 1 year
- ○ 1 to 4 years
- ○ 5 to 10 years
- ○ 11 to 20 years
- ○ Over 20 years

10. Are you

- ○ Self employed/Sole trader?
- ○ Independent businesses with employees?
- ○ Part of a wider group?

11. How many full time equivalent staff are employed locally?

- ○ None - self only
- ○ 5 or less
- ○ 6 to 20
- ○ 21 to 50
- ○ More than 50

12. Which would best describe the location of your customers?

- ○ Cam and Dursley and surrounds
- ○ Stroud District
- ○ Gloucestershire
- ○ South West England
- ○ UK
- ○ International

13. Where does the majority of your business come from?

- ◯ Walk in customers
- ◯ Internet sales
- ◯ Recommendations
- ◯ Trade press/paid for advertising
- ◯ Existing customers

Other (please specify)

14. How would you describe your business?

- ◯ Start Up/Pre Profit
- ◯ Profitable and growing
- ◯ Profitable and stable
- ◯ Profitable and under pressure
- ◯ Stressed

15. What were your latest annual sales?

- ◯ Less than £10k
- ◯ £10k - £50k
- ◯ £50k - £100k
- ◯ £100k - £200k
- ◯ £200k - £500k
- ◯ £500k - £1 million
- ◯ £1 million - £2.5 million
- ◯ More than £2.5m

16. What are the top three concerns for your business in the short term (next 12 months) and medium term (next 5 years)?

	Short Term	Medium Term
Access to suitable premises		
Access to or availability of suppliers		
Recruiting suitable staff		
Retaining staff		
Obtaining finance		
Rising costs		
Finding new markets/customers		
Competition/weak customer demand		
Adapting to new ways of working		
Developing new skills		

17. Where would you look for business support if required?

- ◯ No one
- ◯ Internet
- ◯ Accountant
- ◯ Other professional advisors (solicitor, bank manager, consultant)
- ◯ Local business support groups/forum
- ◯ National trade/professional association
- ◯ Other business owners
- ◯ Local growth hub
- ◯ Friends or relatives

18. On what topics have you received advice in the past?

- ☐ Obtaining finance
- ☐ Managing finance
- ☐ Improving business/profitability
- ☐ Legal issues
- ☐ Employment issues
- ☐ Regulation/tax issues
- ☐ Sales and Marketing
- ☐ E-commerce
- ☐ Personal and staff development/training

Other (please specify)

19. What would help you most with your business - please select up to three

- ☐ Improved broadband
- ☐ Improved mobile phone coverage
- ☐ Access to suitable premises
- ☐ Local business support group/forum
- ☐ Access to local banking
- ☐ Better public transport links
- ☐ Better availability of co-working spaces
- ☐ Better access to local training
- ☐ Improved marketing of the local area as a place to live and do business

20. What actions are planned to reduce the environmental impact of your business over the next 12 months?

- ☐ Reducing energy consumption/Increasing energy efficiency
- ☐ Reducing waste/Recycling more
- ☐ Changing purchasing strategies - more local/sustainable suppliers
- ☐ Reducing business travel/greater use of trains, electric cars etc
- ☐ Developing a sustainability strategy
- ☐ None of the above

APPENDIX 2 – DATA SOURCES

Data sources used to compile the Local Business Database

1. Companies House – for all registered companies in the GL11 postcode area - http://download.companieshouse.gov.uk/en_output.html
2. Stroud District Council – for all businesses in the GL11 postcode area paying Non Domestic Rates – data relating to Feb-23 http://download.companieshouse.gov.uk/en_output.html
3. Stroud District Council Licencing and Permit data in the GL11 postcode area – including alcohol licences, animal welfare licences, food premises, etc https://www.stroud.gov.uk/business/licensing-permits
4. VOSA lorry and bus operator search in the GL11 postcode

   https://www.vehicle-operator-licensing.service.gov.uk/search/find-lorry-bus-operators
5. Environment Agency registered waste carriers in the GL11 postcode area https://www.gov.uk/guidance/access-the-public-register-for-environmental-information#find-a-registered-waste-carrier
6. DVSA Active MOT testing stations in the GL11 postcode area https://www.gov.uk/government/publications/active-mot-test-stations
7. Charities Commission search in the GL11 postcode area https://www.gov.uk/find-charity-information
8. Google Maps search of sole traders in the GL11 Postcode area

Census Data

9. Data for the 2021 Census: https://www.ons.gov.uk/releases/warddataenglandandwalescensus2021
10. Data for the 2011 Census: https://www.nomisweb.co.uk/census/2011/data_finder

APPENDIX 3 – THE ENGINE HUB CIC

The Engine Hub CIC was set up in 2021 in Dursley with the vision *'to inspire local entrepreneurs to develop new social businesses that connect, empower and generate a thriving social enterprise community.'*

Its mission is *"to develop an integrated approach to supporting social business start-up by providing leadership, mentoring, investment and community based asset development through launching and developing local examples".*

To date it has:

- Set up **The Escape Room Dursley** as an exemplar of what can be achieved meeting local need, providing a service, offering employment, stimulating the local economy.
- Taken over the co-ordination of the **Artisan Market** held in Dursley.
- Delivered local business development through use of the **Team Radar** and our escape rooms through the 'Team Development Experience' bespoke sessions.
- Delivered, in Partnership with Gloucestershire Gateway Trust, Gloucester Services and Hobbs House Bakery - '**The Limited Edition Project'** supporting the development of local entrepreneurs.
- **Provided support to Rednock School** Year 12 programme to assist in developing skills for readiness to work alongside modules studied on customer care, making use of the assets of The Escape Room, team radar and facilitating off school site personal development. Supported work experience students.
- Networked and influenced across various local organisations to establish open communication, research potential opportunity, join up activities and provide the linkage our community requires to be prosperous.

APPENDIX 4 - 2014 DURSLEY BUSINESS SURVEY HEADLINES

- Mainly lease their premises 64%.
- Strong return from retail sector 29%
- 64% have been operating for 10 years or more.
- 50% are independent or sole traders.
- For 36% respondents, all of their business is based in Cam and Dursley.
- 61 % of respondents business comes from walk-in customers, followed by 36% based upon recommendation or word of mouth, 25% from retail shop or outlet.
- 39% employ less than 5, 32% employ between 5 to 20 and 14% employ no staff.
- 50% of businesses have their own car parking and for 43%, the majority, their parking is adequate.
- Business confidence was rated as ok for 46% of businesses with 39% rating their future outlook as good.
- The availability of business premises and of a local skilled workforce were both rated as ok by 50% of respondents.
- Parking for staff was rated as very poor by 29% of businesses and poor for customers and visitors also by 29%.
- 86% think the size of their business premises and 64% of their workforce will stay the same size during the next 3 years or so.
- The top three issues restricting the growth of business were identified respectively as parking for staff and customers 39%; joint in second place at 29% were) business rates and weak customer demand.
- Over 60% were either quite satisfied or very satisfied with Dursley as a place to do business.
- Business sectors which respondents would like to see attracted into the area include 68% retail, 61% in manufacturing and 39% in leisure tourism and hospitality.
- 21 % of businesses offer voluntary opportunities, 21 % offer student work placements.
- 46% of businesses were quite satisfied with their existing premises.

- 68% of businesses said that their existing business premises meet current demand and likely future demand. 14% of premises will not (or unlikely to meet future business need).

The biggest challenges for businesses trading in Cam & Dursley were identified as:

- Attracting new customers
- Lack of disposable income amongst some residents
- Parking and ease of access to the shops
- Lack of a large local business;
- Business rates
- Getting customers through the door
- People's negative attitude towards Dursley

Suggestions from businesses to improve trading conditions included:

- Better mix of businesses within the town;
- Town needs to attract customers with a higher disposable income;
- More business units on the Littlecombe Estate
- Free long term parking
- Reduced/zero business rates
- More events to draw people in to town e.g. Autumn Festival.