Economy Background Paper
The Cheltenham Plan 2011-2031

Cheltenham Borough Council
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1. Introduction

1.1 The purpose of the Economy Background Paper is to summarise the relevant evidence and to explain how Cheltenham Plan's policy on the economy has been arrived at. This topic paper forms part of the Plan's evidence base and should be read in conjunction with the Cheltenham Plan itself together with the Gloucester, Cheltenham and Tewkesbury Joint Core Strategy and its evidence base.

The Economic Characteristics of Cheltenham

Overview

1.2 Cheltenham's Economy supports approximately 72,000 jobs. The town has a diverse economic market including sectors such as light industry, food processing, aerospace, electronics and tourism. The UK Government Communications Headquarters – GCHQ is also located in Cheltenham.

1.3 Cheltenham is home to a number of sporting and cultural events. It is the home of the flagship race of British steeplechase horse racing calendar, the Gold Cup, the main event of the Cheltenham Festival held every March. The town hosts several nationally significant annual festivals of culture often featuring nationally and internationally famous contributors and attendees.

1.4 Cheltenham is also a highly successful regional shopping centre, home to department stores including House of Fraser and John Lewis (opening summer 2018) and distinct shopping centres such as the Regent Arcade and Brewery Quarter. There are also many smaller independent and specialist local retailers that combine to make Cheltenham town centre a high-profile destination for leisure and shopping, second only to Bristol in terms of variety and choice in the South West.

1.5 Through the emerging Place Strategy, Cheltenham is defining its ambition for the town. This ambition is set around growth in the economy.

Economic Performance and Outlook

1.6 Gloucestershire's annual rate of economic growth is in line with the national average (1.8% between 1997 and 2011) although Cheltenham's growth has been slightly lower (0.7% for the same period). However, the rate of jobs growth has exceeded the national average and both economic growth and jobs growth are forecast to be strong over the next 20 years (projected 2.4% increase).

1.7 Approximately 22% of all Gloucestershire's jobs are located in Cheltenham. The town remains a significant employment centre within the County of Gloucestershire and this status is forecast to continue.

1.8 Productivity rates in Gloucestershire as a whole are below average and are declining relative to the national average. In 2012, workers in Gloucestershire produced £26.00 of Gross Value Added (GVA) for every hour worked. This was below the English average of £28.30. Between 2004 and 2012, GVA per hour worked rose by 16.3% which was lower than across England at 23.4%. This is a particular issue in Cheltenham where retail and service sector employment has increased whilst higher value jobs have declined. The challenge is how to turn this trend around and increase the proportion of high value employment.

1.9 The decline in high value employment has partly occurred due to a loss of employment land to other uses and lack of modernisation of commercial office space by employers and investors. Since there has been a shift in user requirements over the past few years towards more modern offices space and larger office facilities, there is a resulting perception that Cheltenham is not "open for business."

1.10 Cheltenham is working hard to reverse this perception and key work through the Cheltenham Development Taskforce and the Cheltenham BID (Business Improvement District) is investing in direct engagement with the local business community.

Enterprise and Innovation

1.11 Cheltenham has a strong and growing business base with stronger than average long-term growth in the number of enterprises (11.7% growth between 2004 and 2012) and a higher than average number of enterprises per head of the working age population (68 per 1000 people of working age in Cheltenham compared to a national average of 60 per 1000).

1.12 Business was badly hit by the 2008 recession but has begun to recover. Between 2007 and 2010, the percentage of businesses surviving for one year fell from 97.5% to 88.2%. Whilst survival increased significantly in 2011 to 93.2%, some evidence shows that failure rates in business start-ups after one year remains an issue and that long-term growth in the business base needs to be fostered further.

1.13 Businesses in Cheltenham are more likely to compete on quality, design and innovation compared to nationally, and the rate of patenting is higher than the national average (11.1 patents per 100,000 residents as opposed to 9.4 patents per 100,000 residents nationally).

1.14 Whilst science and engineering occupations are less prevalent in Cheltenham compared to the national average, ICT roles account for a higher share of jobs undertaken by residents than in comparison with the average across England. However, neighbouring authorities are performing well in science and engineering employment so with the creation of new opportunities in Cheltenham, there is a prospect of strengthening in these areas.

1.15 Speculative build of new premises was severely hit by the recession. However, recently, rental levels are indicating that this position is changing including recent consents for speculative office accommodation.

Industrial Trends

1.16 The industry profile and prospects for Cheltenham have changed over the last 15 years and are expected to continue to change in future.

1.17 *Public Administration, Education and Health* are the joint largest contributor to economic output and one of the fastest growing sectors in that regard. The third largest increase in the number of business units taken up across the Borough since 2000 relates to the health sector and a continuing increase in health employment is forecast.

1.18 There is a large concentration of employment in *Defence* and the strongest employment growth has occurred in this sector. There is likely to be a continuing demand for subcontracting and supplier arrangements focussing in and around Cheltenham over the next

5-7 years. In this regard, GCHQ runs a small business innovation programme, which is a mechanism for procuring innovative new solutions from technology and innovation-based Small and Medium Enterprises (SMEs) and there is considerable growth sector potential for the cyber security industry.

1.19 *Business Services* have grown strongly in terms of economic output (at between 4% and 5% a year since 1997) and are projected to grow further in future. The Professional, Scientific and Technical sub sector occupies the largest number of business services units in Cheltenham.

1.20 The *Information and Communication* sector has experienced strong growth in economic output and this is forecast to continue. It has the second highest increase in number of business units in the Borough although there has been a significant fall in employment in telecommunications and printing/ reproduction of recorded media.

1.21 *Production* (which includes manufacturing) is an important contributor to economic output, but there has been decline in output in the sector and total business units over recent years. The highest concentrations of production employment in the town are found in the manufacture of machinery for metallurgy and manufacture of taps and valves. A further decline in employment forecast.

1.22 There has been a shift to self-employment or contract-based work in many business service roles. The role of finance and insurance, whilst important in the past, has declined in terms of output and jobs. This is also true of the real estate sector.

People

1.23 Cheltenham supports a significant number of jobs and provides work for many living outside the district. The town provides a lower share of higher-skilled jobs, and a higher share of lower-skilled jobs compared to the national average. Cheltenham supports a large number of administrative and secretarial jobs, many of which are taken by in-commuters.

1.24 Those working in Cheltenham have a high qualifications profile although this is not fully reflected in the skills levels of the types of jobs undertaken or workplace earnings. In-commuting appears to highest among people with low to intermediate qualification levels.

1.25 The levels of unemployment and incidence of benefits claimants are low in Cheltenham, coupled with high rates of economic participation and employment amongst the working-age population.

1.26 As with many other parts of the country, the population of Cheltenham is forecast to get older and there are significant challenges arising from supporting an increasingly aged population i.e. those over 85 years. A higher proportion of people over retirement age (and therefore less likely to be in employment) has implications not only for the needs of an increasingly diverse elderly population but also in terms of workforce / recruitment especially as related demographic changes may also see younger age groups declining.

Place

1.27 Cheltenham's housing market has witnessed significant increases in the prices since the turn of the century and this has been slightly ahead of the national average. Average house prices are now at least seven times average earnings in the Borough and there are continuing to be significant implications on affordability.

1.28 The economic recession experienced in the wider economy in 2008 did not affect the local housing market significantly. Residential property prices have for the most part remained buoyant and continue to rise. One of the effects of this trend has been to destabilise the local economy and, particularly, to place further pressures on employment land and premises for changes of use to residential.

1.29 For example, since 2010, there has been a distinct and clear loss of B1a (office) floor space including sites that were categorised as 'very good quality' in previous employment land studies. There are also demonstrated losses in A2 professional services to residential uses in areas such as the town's historic core where stakeholders had suggested there is a strong market demand for professional services office accommodation. This demonstrates the strength of the residential values relative to commercial values.

1.30 Rateable values (and therefore business rates) of retail properties are higher in Cheltenham than other Gloucestershire districts and the major cities of Birmingham and Bristol, but below other urban centres such as Bath, Cardiff and Oxford. Remaining competitive therefore remains paramount and as with other towns and cities across the UK, this will mean responding in a timely manner to changes in the retail economy that may result from, for instance, economic uncertainties, increasing globalisation, and changes in shopping habits including greater use of internet shopping. Office rateable values are below many other centres outside of Gloucestershire.

1.31 A large share of workers in Cheltenham travel less than 5km from their home to workplace. Whilst traffic congestion on average across the district is no worse than the national average, a number of roads signal evidence of significant increases in congestion over recent years; A4013 northbound; A40 eastbound; A435 southbound; and A46 northbound.

Employment land and premises

1.32 Evidence compiled as part of the background work to the Cheltenham Plan largely reflects the results of previous economic / site studies undertaken in Cheltenham since 2007. Together they have presented a consistent view on the existing portfolio of sites and premises re-iterating market strengths but also key factors that need to be addressed. The issues identified by the reports and the new site analysis can be summarised as follows:

- Cheltenham has a large quantum of office space but is not enough to meet demand nor necessarily fit for purpose;
- The offer is mostly concentrated in small size office space in regency and older buildings (80 per cent are less than 500 sq. m);
- There is a continued lack of quality, A-grade office space, particularly in the Town Centre;
- The ongoing loss of B1 and A2 sites and premises to residential use has increased pressure on the remaining employment stock. This pressure will continue if regency stock proves to be equally attractive to the residential market in future;
- A number of structural weaknesses in the portfolio of available premises exist, particularly in terms of a lack of business / enterprise parks;
- There is limited business start-up space, particularly serviced and supported space for incubator or innovation development;

- Many existing industrial sites need upgrading to improve market attractiveness and offer. Upgraded sites will be likely to improve the Gross Value Added (GVA) performance and attractiveness to higher value manufacturing and engineering, finance and business services;
- There are a number of significant and important businesses on single occupier sites where there are constraints to the potential expansion of those businesses at that location;
- There are relatively low vacancy rates within industrial sites even though some developments are of average or poor quality. This could reflect the lack of availability of alternative premises;
- There is a significant proportion of ageing stock, particularly those premises that no longer meet modern business needs and single occupier sites that are adversely affected by amenity or access constraints;
- Older commercial sites with buildings that have been vacant for many years and with amenity and access constraints are not proving attractive to the market and will continue to be considered as potential residential sites instead;
- Those employment-related planning consents being implemented invariably involve losses of B1a land within the Town Centre whilst commitments to increase B1 space remain unimplemented;
- Policy needs to maximise the employment benefits of existing sites while other strategic sites are brought to the market over time.

2. Taking Account of Economic Conditions in Plan Making

2.1 The evaluation of the characteristics and trends affecting the local economy has allowed the Council to draw certain conclusions which will influence the Cheltenham Plan's stance towards such matters. Many of these matters were summarised in the Issues and Options Report in 2015 and took account of consultation on the Local Plan Scoping Report in 2013, the findings of the Economic Strategy in 2015, and more recent engagement with local business leaders.

2.2 Whilst it is not intended to repeat all the information as part of this document, four key issues have emerged as requiring an appropriate response:

Key issue 1: The need to achieve ambitions for growth

2.3 The Strategic Economic Plan (SEP) was submitted to the Government by the Gloucestershire Local Enterprise Partnership in 2014. It sets an ambitious growth target of 33,900 new jobs to be provided across Gloucestershire between 2015 and 2021. The Gloucester, Cheltenham and Tewkesbury Joint Core Strategy (JCS) is similarly ambitious setting out a growth target of 39,500 new jobs to be provided in the JCS area between 2011 and 2031.

2.4 If the aspirations of the JCS and the SEP are to be fully realised, they will require significant uplift in economic performance and interventions which deliver the transformational change required. Both strategies identify the need to market the attractiveness of Cheltenham and the excellent quality of life it offers. There are several factors and processes that could lead to economic growth and improved productivity. To achieve growth ambitions (with low productivity as the starting base), the economy will need to:

i. employ more people (and have the capacity for more jobs); and/or
ii. enhance productivity with investments in innovation, skills and capital; and /or
iii. develop new markets / activities that are high value added.

Key issue 2: The need to improve the profile of business within Cheltenham

2.5 There is a need to improve the profile of businesses and business issues within Cheltenham and the Council recognises the potential benefits in working with local businesses in this regard. There is currently a false perception that Cheltenham has very limited land available for employment so, in consequence, opportunities for the regeneration, conversion and re-purposing of existing sites and premises need to be promoted.

Key issue 3: The strategic management of land, property and premises

2.6 Providing opportunity for growth and maintaining the quality of life and quality of place that make Cheltenham unique requires the strategic management of infrastructure and land assets. This will involve the active consideration of expansion needs of existing businesses and employers such as the need for specific types of sites and accommodation as well as consideration of business life cycle needs with respect to premises (such as space for business start-ups and premises for growing enterprises).

2.7 With the quality of Cheltenham's existing employment sites and premises needing to be improved, appropriate support for relocation of existing businesses to new, higher quality locations will sometimes include consideration of supporting uplift on values of existing sites to residential in order to release investment. However, it is also recognised that there is also a market for older and less valuable employment land as this will often be cheaper to rent.

2.8 Allied to the above is the importance of recognising the need for key strategic infrastructure; particularly, infrastructure that assists in sustainable transportation together with infrastructure that helps improve digital connectivity.

Key issue 4: Opportunities presented by the Cyber Security industry

2.9 Public and private sector cyber security activities are significant for Cheltenham and present unique opportunities in terms of high value jobs and activities. In particular, GCHQ presents opportunities to act as a key brand and attract new private sector technology jobs and activities.

2.10 The area in and around Cheltenham, Great Malvern and Hereford is already recognised as a growing centre in the UK for the research, development and commercialisation of cyber security products and services. There are real opportunities from expanding activities in the cyber-security sector but also in any spin-off or associated ICT, digital and technology activities that may have a complementary use for the skills, specialisms and market contacts of the existing cyber security sector. The challenge will be to use the planning system to help nurture and support this potential.

Addressing the key issues

2.11 In terms of tackling the above issues, the Cheltenham Plan has a key role to play. For instance, whilst in strategic land use terms, the JCS is the lead strategy and has identified new sites to cater for some 39,500 jobs between 2011 and 2031, the Cheltenham Plan can complement those ambitions by helping to manage the need for further new allocations in future. The protection of existing land and premises from inappropriate changes of use is fundamental in this process.

2.12 The Plan is an important facilitator of change and is an integral component in raising awareness of the opportunities that are available for business in Cheltenham. Whilst it will achieve limited success its own, by engaging with the private, public and community sectors and inviting input from a wide range of stakeholders as part of the plan preparation process, the Plan's strategy will complement relevant partner initiatives. Furthermore, it will help realise the land use implications of those initiatives with the aim of improving the business profile and economic wellbeing of the town.

2.13 By helping to ensure a good choice of land and premises is available to meet the demands of the market, the Plan can help ensure that more people are employed locally and that economic growth is facilitated. In addition, by targeting particular sectors that are considered high value added, it can further enhance opportunities for wealth generation.

2.14 These matters are covered further as part of the Cheltenham Plan Policy Response later in this document. They also informed the alternatives put forward as part of the Issues and Options consultation in June 2015 and were further considered as part of the Preferred Options consultation in January 2017. A summary of the responses to both consultation exercises are set out below.

3. Community Engagement in Cheltenham

3.1 Full details of all consultation exercises are included the *'Report of consultation to accompany the pre-submission version of the plan'* available separately. The following provides a summary of the main issues raised in relation to the economy.

Issues & Options Report (June 2015)

3.2 As part of the consultation on the Issues and Options Report in June 2015, a total of 3 policy approaches were advanced with each approach containing a number of policy options.

3.3 The first policy approach entailed **safeguarding existing and future employment land**. The majority of respondents who expressed a preference considered that ***Option 3*** represented the best way forward. This would entail protecting the best sites whilst recognising opportunities to re-use and redevelop sites that no longer meet the needs of business.

3.4 The second policy approach entailed **promoting one type of industry over another**. The majority of respondents who expressed a preference considered that ***Option 4*** represented the best solution. This would involve introducing the selective management of Cheltenham's economy and would take the form of policy intervention in the market to kick-start a cyber-security initiative by reserving employment land for those uses that have an essential need to locate close to GCHQ and other high technology ICT businesses.

3.5 The third policy approach entailed **promoting a cyber-security cluster** within the context of the area's growing importance as a centre for the research, development and commercialisation of cyber-security products and services. The majority of respondents who expressed a preference considered that ***Option 6*** represented the best way forward and that there would be benefits of following this approach in continuing to help diversify the local economy whilst taking advantage of one of the area's identified strengths. The views expressed in relation to this option also offer consistency with the opinions made in relation to the second policy approach above.

Preferred Options (January 2017)

3.6 Consultation questionnaires raised a variety of questions in relation to economic matters including whether the public agreed with the proposed Preferred Strategy for the economy. Consultees were also asked to respond to the specific economic proposals of the Plan, in particular, promoting economic growth and the designation of employment land.

3.7 The vast majority of respondents supported the overall Preferred Strategy for the economy, with requests to ensure that more high-value jobs are created. Policy EM1, which proposes to safeguard key existing employment land proved extremely popular with several stressing the need to retain employment land in key areas of the town.

3.8 The proposal to safeguard non-designated existing employment land (Policy EM2) was just as popular, receiving approval from 91% of respondents. The comments presented similar themes to the EM1 response, but with consultees highlighting the request to provide housing where employment uses have failed or are underused. A similarly popular response was received in relation to the allocation of specific employment sites via Policy EM3.

3.9 Finally, Policy EM4, designed to promote the cyber-security sector in Cheltenham, received strong support (93%). Several respondents considered that having a cyber park would give Cheltenham an advantage in attracting high-value jobs in a specialist industry.

Cheltenham Plan Policy Response

Preferred Options

3.10 In taking the views of respondents into account, the Council undertook an evaluation of all existing business land in Cheltenham as part of the preparation of the Preferred Options. This included all active / functioning employment sites together with those sites which are currently unoccupied but where the last use was for employment purposes (all site assessments are included at Appendix 1). As a result of this evaluation exercise and in conjunction with the evidence resulting from a variety of previous employment-related studies, particularly the 'Sites Typology' from the Cheltenham Employment Sites Review (2015), it was possible to identify which sites should be protected for employment purposes and which sites can be considered for alternative uses, principally housing.

3.11 Arising from this, the Preferred Options put forward a spatial strategy with associated land-use planning policies which reflected the intention to better manage the use of employment land in future whilst having regard to aspirations for growth and the inherent strengths that the Borough possesses. This strategy was founded on market analysis which has identified a strong requirement for town centre employment sites as well as edge of town opportunities for business.

3.12 The need to safeguard sites and premises in the identified areas partly arose from the fact that in recent years a considerable number of employment uses have been lost owing to changes of use. The changes that have occurred are mostly to residential use and have been justified on the grounds that sustainable housing development is much needed in the Borough. However, the cumulative effect of these changes has been to reduce the overall amount of employment land available to the extent that greater efforts to facilitate the process of safeguarding have now become paramount.

3.13 Cheltenham still maintains a considerable amount of employment land overall but it is important that the land and premises available are suitable to meet the various needs of the market in terms of quantity, quality, deliverability and spatial distribution / location.

3.14 Following on from the above, the Council further explored the possibility of land-use policy intervention that might help facilitate the selective management of the economy in order to create a cyber-security cluster. A specific policy was formulated to reflect this in the Preferred Options and has been taken forward to the Pre-submission plan. The policy positively promotes the type of development the Council would like to see in Cheltenham and gives clear support to cyber security activities. This approach is similar to the approach that safeguards land for one use over another although it specifically recognises the importance of cyber security as business activity in the town and is aimed at taking advantage of the immediate opportunities that exist in fostering and further developing the knowledge and technology-based economy.

Pre-submission Plan

Strand 1: Safeguarding existing employment land

3.15 The Employment Land review undertaken as part of the development of the Economic Strategy indicates that there continues to be a finite land resource available for the development of new employment sites in the Principal Urban Area (PUA). In order to help achieve the Strategic Economic Plan and Joint Core Strategy ambitions for job provision, the Cheltenham Plan must try to address this whilst also considering the needs of competing land uses, principally residential.

3.16 The historical incremental loss of business land and premises to other uses in the PUA though legitimate and allowed by previous adopted local plan policy has been accelerated by Permitted Development Rights which give the Council less control over the changes of use that can legally occur without the need to gain consent.

3.17 Estimates covering the last two decades consider that between 750,000 and 1,000,000 sq. ft. of office space have been lost from Cheltenham. Whilst this is not a problem unique to the town, and may owe much to globalisation and the downgrading of the regional HQ market, it remains a significant issue that the Borough needs to respond to.

3.18 A situation is now presented whereby a more radical policy approach is required if sufficient and appropriate land is to be available for employment purposes and Cheltenham's growth aspirations are to be realised in future.

3.19 The areas identified as containing key employment assets are shown on the Cheltenham Plan Proposals Map. The sites contained within these areas are all considered to have realistic potential to make a significant contribution to delivering new jobs and increasing GVA / productivity over the plan period to 2031. As such, they are to be specifically safeguarded from changes to other forms of development with the associated policy taking a criteria-based approach to safeguarding key sites (see Policy EM1).

TABLE 1: SITES DESIGNATED AS KEY EMPLOYMENT SITES				
Site ref.	**Site name / address**	**Key characteristics**	**Predominant character**	**Size (ha)**
ES1 (Survey refs. 8, 12-14)	Runnings Road - Kingsditch Trading Estate Block 1 & Blocks 5-7	• Principal industrial area to north-west of Cheltenham • Good access onto A4019 & M5 J10. • Wholesale; light industrial; engineering; manufacturing. • Mixed quality buildings with investment reqd. in certain buildings to ensure continued fitness for purpose. • Some poor public realm. • Some sites at low density with opportunities for redevelopment / investment. • High profile development where any vacancies on key gateway plots would cause the profile of the estate to deteriorate.	Industrial Estate	28.4
ES2 (Survey ref. 75)	Gloucester Road, Benhall – GCHQ	• Located to the west of town • Excellent strategic location off A40 / close to M5 J11 • Good local access off Gloucester Rd. / Hatherley Lane • Good level of parking • Very high quality office accommodation with excellent surroundings • Bespoke buildings occupied by a specific user since 2004. • Large employer and important contributor to local economy • Considered a key business in Borough which needs to be retained to avoid vacating the whole site.	Large Site / Single Occupier	19.5
ES3 (Survey refs. 44 & 67)	Jessop Avenue / St James Square	• Substantial prime office space in Cheltenham Town Centre. • Refurbished buildings suitable for blue chip companies. • Expansion opportunities to implement extant planning consent on adjacent car park at Honeybourne Place. • Good access by public transport • Close to many local facilities for workforce.	High Quality Office (Town Centre)	2.6
ES4 (Survey ref. 65)	UCAS – New Barn Lane	• Located in northern Cheltenham • Good strategic access off A435 • Good local access to / from Evesham Road • Buildings of excellent quality • Situated in a high quality landscaped environment. • Some buildings given over to student accommodation in recent times. • Still considered an important business in Borough which needs to be retained to avoid vacating the whole site.	Large Site / Single Occupier	2.7
ES5 (Survey ref. 29)	Tewkesbury Road (Block 1), Neptune Business	• Located on north-western edge of Town Centre • Good strategic access off A4019, 3 miles from M5 • Good local access, well served by public transport.	Business Park / small businesses	2.6

TABLE 1: SITES DESIGNATED AS KEY EMPLOYMENT SITES				
Site ref.	**Site name / address**	**Key characteristics**	**Predominant character**	**Size (ha)**
	Centre & Space Business Centre	• Adequate parking • Good, modern office space, warehouse and trade counter • Offers a flexible range of unit sizes along with bespoke packages to support occupiers' requirements. • Supports 26 businesses including start-ups and small businesses • Facilities nearby for workforce		
ES6 (Survey ref. 4)	Cheltenham Trade Park	• Located on north-western edge of Town Centre • Good strategic access off A4019, 3 miles from M5 • Acceptable local access via residential roads (e.g. Arle Avenue) • Well served by public transport • Adequate parking • Office and light industrial location providing a range of units and two office buildings. • Some vacant units available.	Business Park	4.4
ES7 (Survey ref. 22)	Hatherley Lane - The Reddings	• 2 sites located to the west of the town • Excellent strategic location off A40 / close to M5 J11 • Good local access off Gloucester Rd. / Hatherley Lane • Good level of parking • Good quality / modern properties • Adequate public transport • Some nearby facilities for workforce • Expansion opportunities available south and west of Pure office building • Limited public transport	Business Estate	2.8

3.20 The Council will seek to ensure that the best, most versatile employment land, defined as Key Employment Land will remain available for B1, B2 and B8 employment and not eroded for other uses.

3.21 The above sites are recognised as having the potential to make a significant contribution to the aim of delivering new jobs and increasing GVA/productivity in Cheltenham over the Plan Period and would assist in meeting the aspirations for growth set out in the Strategic Economic Plan.

3.22 A site's designation as a key site is based on one or more of a variety of factors and, to this end, identified sites can exhibit a range of differing characteristics. The following have considered first and foremost:

- Whether the character of the site is predominantly traditional employment-based (use classes B1/B2/B8);
- The location of the site in terms of its strategic and local accessibility;
- Access to the site by public transport, walking and cycling and the site's ability to improve local transport / connectivity;
- The proximity of community facilities to help support the workforce;
- The size of the site and its capacity for expansion in future;
- Whether there is currently a limited supply of such premises / accommodation across the Borough;

- Whether the is market demand / requirements for such locations;
- The lack of constraints (physical or otherwise) to unhindered continued use, or future expansion.

3.23 By identifying key sites in this way, it is intended that the Cheltenham Plan will provide a more refined and focussed approach to facilitating economic growth than before, and that by protecting such sites, the Plan will help ensure a more balanced economic strategy which simultaneously helps to capitalise on key areas such as the recent rapid growth in demand for serviced office accommodation.

3.24 To not follow such an approach would risk causing further loss of high quality business and enterprise parks and premium grade offices and would delay the Plan's ability to meet the needs of business. The resulting lack of employment space in sustainable locations could result in increased car use as businesses are forced to locate to offices outside the town, negatively impacting the local economy.

3.25 Those employment sites that were not considered to be key sites and which are therefore not delineated on the Proposals Map will be treated in one of two ways:

- Some will continue to be safeguarded for employment through a policy that embodies greater flexibility than that which applies to the areas containing key employment assets (see Policy EM2).
- A small number have been considered for alternative uses and are being advanced with more appropriate / deliverable allocations as part of the Pre-submission Plan, for example, residential uses on the former Premiere Products site at Bouncer's Lane (see Policy HD3).

Pre-submission Plan

Strand 2: Securing new employment land through site-specific allocations

3.26 Employment is now considered in a wider sense than traditional office (B1), industrial (B2) and warehousing (B8) use classes. Uses such as retail, hotels, tourism, leisure facilities, education, health services and residential care can also be large employment providers.

3.27 Indeed, the Cheltenham Economic Strategy (2015) suggests that approximately two thirds of new jobs in the JCS area will be created in sectors not normally associated with traditional employment land use. The economy will therefore need a flexible supply of land that is responsive to the changing needs of the market and, in terms of the Cheltenham Plan it falls to the suite of economic policies to provide a sufficiently positive and pro-active steer.

3.28 The primary emphasis of the Plan is to protect existing sites and premises. Such sites will significantly assist in providing the land supply necessary to support economic growth and secure the continuing presence of valuable employment assets. By protecting existing employment land, the need to allocate additional employment sites is reduced and the value of previous infrastructure investment is retained.

3.29 However, it is recognised that to improve the choice and supply of land for employment purposes, a sufficiently diverse portfolio of sites needs to be available and new allocations also need to be made.

3.30 The consideration of employment land requirements undertaken as part of the Assessment of Updated Economic Forecasts for the Gloucester, Cheltenham and Tewkesbury JCS in 2014 concluded that between 34ha and 60ha of B class employment land would be required across the JCS-wide area between 2011 and 2031 to meet anticipated employment requirements.

3.31 Figures advanced by the Gloucestershire Local Enterprise Partnership through the Strategic Economic Plan in 2014 set an ambitious job growth target of 33,900 new jobs to be provided between 2015 and 2021 for Gloucestershire.

3.32 By way of Policy SP1, the JCS recognises that provision needs to be made to support around 39,500 new jobs between 2011 and 2031 across three neighbouring authorities. This level of provision is challenging but will help to provide choice and a degree of flexibility to the market in future. JCS strategic allocations through urban extensions at West Cheltenham and North West Cheltenham make significant contributions to overall provision both in terms of housing and employment land.

3.33 In considering the need to secure new employment land, the Cheltenham Plan has had regard to the aforementioned progress made through the JCS process and the results of the latest Strategic Assessment of Land Availability (SALA) which considered the capacity for new development within the Principal Urban Area of Cheltenham.

3.34 As a result, it is proposed to make a number of allocations for employment in the Cheltenham Plan (Policy EM3 refers). In the main, allocations reflect existing planning consents which have been granted to help address specific needs and fulfil the wider strategy for employment embodied in both existing and emerging plans.

TABLE 2: SITES ALLOCATED FOR EMPLOYMENT			
Site ref.	**Site name / address**	**Description**	**Size (ha)**
E1	Jessop Avenue	• Flat parcel of land located on the western edge of Cheltenham Town Centre. • Currently used as private car park. • An application for a bespoke B1 office development was approved in October 2016 (16/01417 refers) with construction currently underway.	0.34
E2	Hatherley Lane	• Flat parcel of land located on the western periphery of Cheltenham. • Adjacent to existing offices. • Well connected to the strategic highway network via the A40 and J11 of the M5. • The site is brownfield land has previously been used for employment purposes. • Planning permission was granted for office use as part of a larger site.	0.4
E3	Grovefield Way	• Flat parcel of land on the western periphery of Cheltenham. • Well connected to the strategic highway network along the A40 and to J11 of the M5. • The site provides an opportunity for the establishment of a modern business environment at an important gateway location. • The site has an extant planning consent for B1 employment uses. • The Principal Urban area is being amended to accommodate this allocation.	6.40
E4	Chelt Walk	• Flat parcel of land located at the western edge of Cheltenham Town Centre. • Currently used as a public car park.	0.68

		• Represents a significant gap in the urban fabric of the town. • Prime employment site capable of accommodating a modern office development • Within Flood Zones 2 & 3 so design and mitigation will be important factors. • A small element of residential may also be possible.	

Pre-submission Plan

Strand 3: Promoting cyber-security

3.35 The National Planning Policy Framework supports local authorities to plan positively for the location, promotion and expansion of cluster networks of knowledge driven, creative or high technology industries. Within this context, and given the significant opportunities presented by the cyber-security sector in Cheltenham, it is considered imperative that the Council should look to support a growing and high technology global industry in the area. Whilst a successful approach will require intervention and coordination across a number of policy areas, appropriate land-use planning will be integral to the success of any coherent strategy. In this way, planning can be used as one of the primary vehicles for facilitating the positive change that is required and, specifically, it would help steer the implementation of a wider cyber-security business initiative.

3.36 Consequently, a new policy is being introduced (Policy EM5) which positively promotes the location of appropriate businesses to Cheltenham. The policy is designed to take advantage of the immediate opportunities that are known to exist in terms of GCHQ and its supply chain, but also to provide suitable sites and premises for new and expanding suppliers or new or existing SMEs in this cluster.

3.37 More particularly, it helps reinforce the concept of a cyber security hub being established at West Cheltenham (see JCS Policy A7) and supports UK government priorities to commit significant financial investment towards the establishment of a National Cyber Centre and cyber innovation hub in Cheltenham.

Pre-submission Plan

Strand 4: Providing support for business start-ups and SMEs

3.38 Issues identified through background work to the Cheltenham Plan include an acknowledgment of the following economic characteristics:

- there is limited business start-up space available particularly serviced and supported space for incubator or innovation development;
- there is a lack of intermediate-type accommodation to help small business grow;
- there are a number of important businesses on single occupier sites where there are constraints to the potential expansion of those businesses at that location.

3.39 In addition, an analysis of ONS business failure statistics from across the UK in 2017 suggested that Cheltenham has a high proportion of business failures after one year (87%).

3.40 Whilst the reasons for such failures are not entirely clear and the statistics include mergers and takeovers which form an active part of the Cheltenham economy, the Council and its partners are working to address the matter through increased business support and the provision of a wider range of more accessible advice, guidance and networks.

3.41 In land use policy terms, the Cheltenham Plan will provide a suitably robust framework to help steer the way in which existing employment land and premises are managed. Policies EM1 and EM2 have been formulated to ensure that changes away from job generating uses are only allowed in certain circumstances. Policy EM3 makes several new employment allocations, the first in the Borough for many years.

3.42 However, in addition to the above, Policy EM6 is being introduced to provide 'in principle' support for new business start-ups and the graduation of existing small businesses to intermediate and medium-sized enterprises. Some existing employment sites, for example, Tewkesbury Road (Neptune Business Centre and Space Business Centre) already contain a flexible range of unit sizes including start-up and small business accommodation along with bespoke packages to support other occupiers' requirements all housed in serviced accommodation.

The importance of a joint approach in responding to economic challenges

3.43 It is vital to ensure that Cheltenham has sufficient capacity to support economic growth in future and to ensure that local residents have access to a good supply of jobs.

3.44 The overall Economic Strategy for the area depends on a variety of sub-strategies coming together and a number of parties working together to achieve common goals. The Cheltenham Plan, though at the centre of the drive to realise the wider economic aims for the Borough cannot achieve all those aims on its own. Success will very much depend on a consistent and coordinated approach to delivery from a range of organisations. To this end, the Council will actively engage with the private, public and community sectors including the Cheltenham Business Improvement District, Cheltenham Development Taskforce, Cheltenham Chamber of Commerce, Gloucestershire County Council and Gloucestershire Local Enterprise Partnership to promote and improve the economic well-being of the town and Borough. This will be supported by the emerging place strategy, currently being prepared by the Council in partnership with stakeholders and the wider communities of the Borough together with a focussed economic development action plan.

Appendix 1

Assessment of existing employment sites

Map ref.	Address	Use Classification	Area (ha.)	Qualitative Scoring	Summary Assessment	Eligible for Key Employment Site Status?
75	Gloucester Road, Benhall - GCHQ	B1 Office	16.99	**72**	• Located to the west of town • Excellent strategic location on A40 and close to M5 J11 • Good local access off Gloucester Road • Very high quality office accommodation with excellent surroundings • Large employer and key contributor to local economy	✓
47	The Promenade - Cheltenham Borough Council	B1 Office	0.55	**71**	• Regency style building in TC • Good public transport access • Facilities for the workforce nearby • Somewhat outdated office accommodation • Potential for mixed use redevelopment including adjacent area	
43	Montpellier Drive, Bath Road (Eagle Star)	B1 Office	1.33	**70**	• Good quality building on edge of Town Centre • Good public transport access • Facilities for the workforce nearby • Some parking • Poor internal layout	
44	Jessop Avenue	B1 Office	1.79	**70**	• Substantial prime office space in Cheltenham Town Centre • Attractive, high quality environment. • Expansion opportunities to implement extant planning consent on adjacent car park at Honeybourne Place. • Good access by public transport • Close to many local facilities for workforce	✓
74	121 - 133 Promenade	B1/A2/A1	0.33	**70**	• Regency style building in Town Centre • Good public transport access • Facilities for the workforce nearby • Good quality buildings but outdated internal layout • No room for expansion unless as part of wider redevelopment	
48	Royal Crescent and St George's Place	B1 Office	1.35	**70**	• Regency style buildings in Town Centre • Good public transport access	

					• Facilities for the workforce nearby • Good quality premises but outdated internal layout • No room for expansion unless as part of wider redevelopment	
66	Bath Mews, Bath Parade	B1	0.09	**69**	• Small building east of Town Centre • Good public transport access • Facilities for the workforce nearby • Good quality property but outdated internal layout • Very confined site with no scope for expansion	
56	Old Bath Road and Thirlestaine Road	B1 Office	2.93	**69**	• Attractive, location on south-east edge of Town Centre • Good public transport access • Some facilities for the workforce nearby • High quality building but somewhat outdated	
67	St James's Square, St James's House	B1	1.10	**69**	• Substantial prime office space in Cheltenham Town Centre • Modern, open plan accommodation • Attractive, high quality environment. • Good access by public transport • Close to many local facilities for workforce	✓
49	The Quadrangle, Promenade	B1/A2	0.17	**68**	• Reasonable quality building in attractive Town Centre location • Good public transport access • Facilities for the workforce nearby • Slightly outdated (1970s) office accommodation	
52	Vittoria House, Vittoria Walk	B1 Office	0.18	**68**	• Regency style building in attractive location south of Town Centre • High quality and well maintained property • Good access by public transport • Close to many local facilities for workforce. • Constrained by building design/ layout • No opportunities for expansion	
53	St Georges Road - Magistrates Court and Government Offices	B1 Office	0.75	**67**	• Good location south of Town Centre • Adequate / reasonable quality buildings • Good access by public transport	

					• Close to many local facilities for workforce. • Constrained by limited capacity for expansion	
34	Cirencester Road - Spirax Sarco	B1 Office	0.50	**67**	• Located on south-eastern edge of town • Period house with more modern buildings in high quality grounds • All buildings of good quality • Edge of town location means that accessibility by public transport is poor • No facilities for the workforce nearby	
61	Parker Court and Brailsford House, Knapp Lane	B1	0.05	**67**	• Located to the west of the Town Centre • Good quality buildings • Good access by public transport • Close to many local facilities for workforce. • Small site confined by surrounding urban area • Internal layout only suits small business	
51	Bayshill Road – former Kraft HQ	B1 Office	0.49	**67**	Redeveloped for housing	**n/a**
70	Lypiatt Road	B1/A2	0.54	**66**	• Good condition buildings located in south-western fringes of the Town Centre • Good access by public transport • Close to some local facilities for workforce. • Small site confined by neighbouring uses so little room to expand	
55	Lansdown Road / Lypiatt Lane	B1 Office		**66**	• Located in south-western fringes of the Town Centre • Good access by public transport • Close to some local facilities for workforce. • Site is densely developed but buildings are of good quality and well maintained • Surrounding uses confine the site and mean there is very little opportunity to expand	
42	St Margaret's Road and North Place (Pate Court)	B1	0.30	**65**	• Located on north-eastern edge of Town Centre next to A4019 • Good access by public transport • Close to many local facilities for workforce. • Adjacent to other employment uses but little room to expand	
65	New Barn Lane - UCAS	B1 Office	2.73	**65**	• Located in northern	✓

					Cheltenham • Good strategic access off A435 • Good local access to / from Evesham Road • Sparse facilities nearby but frequent bus to TC • Buildings of excellent quality • Situated in a high quality landscaped environment. • Considered a key business in Borough which needs to be retained to avoid vacating the whole site	
20	Princess Elizabeth Way	B8/SG	5.19	**64**	• Located to the north-west of Cheltenham adjacent to the A4013 • 2 units (storage unit car sales) • Good strategic access via A4013/A4019 • Local access is reasonable • Few facilities nearby for workforce	
22	Hatherley Lane, The Redding's	B1/B2		**64**	• 2 sites located to the west of the town • Excellent strategic location off A40 / close to M5 J11 • Good local access off Gloucester Rd. / Hatherley Lane • Good level of parking • Good quality / modern properties • Adequate public transport • Some nearby facilities for workforce • Expansion opportunities available south and west of Pure office building	✓
60	Vittoria Walk / Oriel Road	B1/SG	0.84	**64**	• Effectively 2 adjacent sites In Town Centre • Reasonable condition properties • Good access by public transport • Close to many local facilities for workforce	
68	Parabola Road – Former Inland Revenue offices	B1	0.15	**63**	• Located on western edge of Town Centre in a primarily residential area • Good access by public transport • Close to some local facilities for workforce. • Attractive location but dated accommodation	
4	Cheltenham Trade Park, Arle Road	B1/SG	3.83	**62**	• Located on north-western edge of Town Centre • Good strategic access off A4019 / M5	✓

					• Acceptable local access via residential roads • Well served by public transport • Adequate parking • Office and light industrial location providing a range of units and two office buildings. • Some vacant units available	
13	Kingsditch, Block 6	B2	5.71	**62**	• Principal industrial area to north-west of Cheltenham • Good access onto A4019 & M5 J10. • Generally occupied by engineering and car parts companies • Primarily good quality buildings of a better quality than much of the rest of Kingsditch • Vacancies on key gateway plots would cause the profile of the estate to deteriorate	✓
14	Kingsditch, Block 7	B2/SG/D2	5.54	**62**	• Principal industrial area to north-west of Cheltenham • Good access onto A4019 & M5 J10. • Generally light industrial uses • Primarily good quality buildings of a better quality than much of the rest of Kingsditch • Vacancies on key gateway plots would cause the profile of the estate to deteriorate	✓
73	Tebbit Mews, Winchombe Street	B1	0.12	**62**	• Located in northern part of Town Centre • Good quality office space • Reasonable strategic access • Poor local access / servicing • Good accessibility by public transport • Close to many local facilities for workforce • Limited space for expansion	
1	Gloucester Road- Travis Perkins	Sui Generis	3.39	**62**	• Western edge of Town Centre • Sui Generis uses only (Builders Merchants & Car Dealerships) • Good strategic location with nearby bus and rail links to surrounding areas • Some nearby facilities for workforce • Potential conflict with surrounding residential uses	
8	Kingsditch Block 1 including Manor Park Business Centre	B1/B2/A1/SG	10.51	**62**	• Principal industrial area to north-west of Cheltenham • Good access onto A4019 &	✓

					M5 J10. • Wholesale; light industrial; engineering; manufacturing. • Mixed quality buildings with investment required in certain properties to ensure continued fitness for purpose. • Vacancies on key gateway plots would cause the profile of the estate to deteriorate	
9	Kingsditch, Block 2	B2/A1/SG	7.72	**62**	• Principal industrial area to north-west of Cheltenham • Good access onto A4019 & M5 J10. • Retail; light industrial; manufacturing. • Mixed quality buildings with investment required in certain buildings to ensure continued fitness for purpose. • Retail units along Kingsditch Lane have begun to erode the traditional employment characteristics of the area	
10	Kingsditch, Block 3	B2/B8/SG	6.66	**62**	• Principal industrial area to north-west of Cheltenham. • Good access onto A4019 & M5 J10. • Wholesale; light industrial; manufacturing. • Mixed quality buildings with investment required in certain buildings to ensure continued fitness for purpose. • Some large vacant units apparent	
11	Kingsditch, Block 4	A1/A3/SG	9.65	**62**	• Principal industrial area to north-west of Cheltenham • Good access onto A4019 & M5 J10. • Recently redeveloped with large, purpose-built retail units • Employment character now significantly eroded	
12	Kingsditch, Block 5 (Spirax Sarco)	B2	6.62	**62**	• Principal industrial area to north-west of Cheltenham • Good access onto A4019 & M5 J10. • Mixed quality buildings • Single user manufacturing site with scope to expand in future • Company needs to be retained to avoid vacating the whole site	✓
57	Bath Road and Suffolk Road	B1/A2	0.93	**62**	• Located to the south of the Town Centre • Good quality offices on 2	

					separate sites • Good location with some on-site parking • Good access by public transport • Close to some local facilities for workforce. • Little scope for expansion	
40	Ambrose Street and Knapp Road	B1/B2	0.21	**62**	• Located in northern Town Centre • Effectively 2 different sites with reasonable quality offices • Limited space for expansion • But good location with good transport links	
69	Parabola Road/ Montpellier Street	B1	0.15	**61**	• Located on south edge of Town Centre • Good access to facilities and services • Good public transport linkages • Attractive regency property	
19	Charlton Kings Industrial Estate	B1/B2	1.43	**61**	• Located on south-eastern edge of Cheltenham • Some public transport but no facilities nearby • Contains traditional small-scale industrial units and Chelsea BS contact centre	
37	Blaisdon Way	SG	3.13	**61**	• Located on north-western edge of Cheltenham • Well located for A4019 and M5 • Removal / storage / car sales • Not a B class site	
80	Kingsmead Industrial park	B2/SG	3.36	**60**	• Located on north-western edge of Cheltenham • Good strategic access • Car dealership (Sui Generis) & Assa Abloy door solutions • Poor access by public transport and no local facilities	
58	Winchcombe Street - Sign Craft	B1	0.14	**60**	Redeveloped for housing	**n/a**
59	Wellington Street and Bath Road (Delta Place)	B1/A1/A2	0.36	**60**	• Located in east of Town Centre • Good access to services and facilities • Good condition buildings • Little room for expansion	
21A	Village Road (Douglas)	B2	1.37	**60**	• Primarily a residential area in north-west Cheltenham • Buildings of reasonable condition • Good access to A4019 / M5 • No services and facilities in immediate area	
38	Tewkesbury Road, Block 3			**59**	• Site is now retail only (Wickes/ Staples)	**n/a**

54	The Barlands, London Road including Mono Telecom	B1 Office	2.53	**59**	• 4 km south-east of Town Centre on A40 • Any scope for expansion constrained by AONB • Modern buildings on a well maintained site • Vacant factory and office space present (Flexfurn) • Good access • Sparse public transport and no facilities nearby	
2A	Workplace at the Bramery, Alstone Lane	B1 Office	0.28	**59**	• Modern 2 storey office building in good condition • Part of wider 1950s industrial development where local road access is average / poor • Strategic road access is adequate • Good parking • Close to rail and bus routes • Little room for expansion	
21B	Village Road, Tungum Ltd, Douglas Equipment Ltd	B2	0.70	**59**	Redeveloped for housing	**n/a**
29	Tewkesbury Road, Block 1 including Neptune Business Centre and Space Business Centre	A1/B1/B2/B8	2.75	**58**	• Located on north-western edge of Town Centre • Good strategic access off A4019, 3 miles from M5 • Good local access, well served by public transport • Modern office space, warehouse and trade counter • Flexible range of unit sizes and bespoke business packages • Good parking • Facilities nearby for workforce	✓
64	Colletts Drive and Lower Mill Street	A1/SG	0.68	**57**	• On north-western edge of TC • Graham Plumbing & Bathroom etc. • Reasonable strategic access (A4019 nearby) • Poor local access • Quality of buildings adequate • Poor parking	
45	Swindon Road - Ebley Tyre and Exhaust Centre	B1/B2/SG	0.09	**57**	• North of Town Centre • Average quality • Opportunities for expansion • Good local facilities and access to public transport • Reasonable strategic access • Single user site	
2B	The Bramery, East of St Georges, Alstone Lane	B1/B2	1.39	**57**	• Part of wider 1950s industrial development where local road access is average /poor • Strategic road access is adequate • Good parking • Close to rail and bus routes	

					• Little room for expansion	
3	St Georges Road, Spirax Sarco	B2	1.25	**57**	Redeveloped for assisted living complex	**n/a**
24	Bouncers Lane - Premiere Products	B2	2.58	**56**	• Vacant site • Poor strategic access • Site likely to be advanced for housing	
6	Tennyson Road - Spirax Sarco	B2	0.92	**56**	Redeveloped for housing	**n/a**
16A	Maida Vale Business Centre	B1/B2	0.34	**56**	• Located to south of town • Modern development with 10 businesses • Buildings of average quality • Easy parking • Few facilities nearby • Strategic access poor • Poor public transport	
15A	Churchill Trading Estate / Mead Road	B1/B2/SG	2.46	**55**	• Located south of town • Around 50 buildings from last 50 years • Mainly light industry and wholesale • Average quality • Poor local and strategic access	
30	Tewkesbury Road, Block 2	B2/SG	5.25	**55**	• Located on north-western edge of Town Centre • Good strategic access off A4019, 3 miles from M5 • Good local access, well served by public transport. • 10 businesses in a mix of modern and older good quality buildings. • Adequate parking but access to Arle Avenue is narrow • Facilities nearby for workforce • Several vacant units present	
36	Chapel Lane and Commercial Street	B1	0.01	**55**	• South-west of Town Centre • 100 year old 2-storey buildings in good condition (residential appearance) • Facilities nearby • Public transport good • Parking poor • Local and strategic access poor • No room to expand	
7	Battledown Industrial Estate, Hales Road	B2/SG	4.19	**55**	• A general industrial estate to the east of the town supporting a mixture of uses • Some properties old and dilapidated • Around 6 vacant premises • Poor strategic access • Locally, site is accessed through residential area • Expansion constrained by nearby housing • Parking is a problem along	

					King Alfred Way • Few facilities nearby	
2C	St Georges Business Park, Alstone Lane	B1/B2	0.53	**55**	• Part of wider 1950s industrial development where local road access is average /poor • Strategic road access is adequate • Good parking • Close to rail and bus routes • Little room for expansion	
28	Lypiatt Street and Tivoli Walk (Groves Batteries and Printbox Works)	B1/B2	0.13	**55**	• 2 adjacent sites south-west of Town Centre • Good quality buildings housing office and light industrial uses • Good access to public transport and local facilities • Parking / servicing very poor • No space for expansion	
2E	The Vineyards, Access off Gloucester Road	B1/B2	4.43	**55**	• Part of wider 1950s industrial development • Local road access is better than much of the development (i.e. 2a/2b/2c/2d) • Good parking • Close to rail and bus routes • Little room for expansion	
2D	Alstone Lane Trading Estate, Alstone Lane	B1/B2	0.87	**54**	• Part of wider 1950s industrial development where local road access is average /poor • Strategic road access is adequate • Good parking • Close to rail and bus routes • Little room for expansion	
25	Cromwell Road - Kohler Mira Ltd	B2	2.87	**54**	• Located to the north-east of the town in a primarily residential area • Industrial and office accommodation of average quality and less than 50 years old • Good servicing and parking • Strategic and local road access is poor • Few facilities nearby • Little room for expansion	
31	Swindon Road-Lyndon Design & Car dealers	SG	0.80	**54**	• Two sites in the north-west of Cheltenham comprising Lyndon Design, Imperial Cars and Ebdons Car Sales • Average quality buildings / environment • Good local and strategic highway links	
27	Lansdown Crescent Lane	B1/B2	0.55	**54**	• Site south-west of the Town Centre • 2 storey small businesses • Average quality buildings • No opportunity for	

					expansion • Poor parking • Good public transport and workforce facilities nearby	
62	Ambrose Place and Clarence Street - JMS Motors	SG	0.04	**52**	• Garage in north-west of Town Centre • Good access to public transport and facilities for the workforce • Very constrained site so parking provision and servicing are very poor	
72	Bloomsbury Street/Market Street	B1	0.04	**51**	Redeveloped for housing	**n/a**
18	Leckhampton Industrial Estate.	B2	0.89	**51**	Redeveloped for housing	**n/a**
33	Carlton Street and Hewlett Road	B1/B8	0.08	**51**	• Two separate sites (one vacant) of average quality in a primarily residential area east of Town Centre • Parking and circulation are poor • Strategic access is poor • Local access is very poor • No expansion space	
32	Brunswick Street - RW Burt & Co Autobody Repairs, G & L Motors	B2/SG	0.13	**51**	• Two separate sites of average quality in a primarily residential area north of Town Centre • Parking and circulation are acceptable • Strategic access is good / adequate • Local access is fair • No expansion space	
39	Grove Street and Burton Street	B2/SG	0.43	**50**	• Collection of back-street garages and small businesses to north-west of Town Centre including builders and light industrial users • Buildings of average quality • Parking and circulation poor • Local access very poor • Strategic access good / adequate • Public transport accessibility and local service provision good	
71	Lower High Street - J R Laboratories	B2	0.07	**50**	• Located to the north-west of the Town Centre • Light industrial (optical manufacturing) • Low quality building with little space for expansion • Parking and circulation poor • Local access poor • Strategic access adequate • Public transport and local service provision good	
15B	Naunton Park Industrial Estate	B1/B2/SG	0.30	**48**	• Located to the south of town • Average quality	

					• Parking and service provision poor • Constrained by residential development nearby • Poor strategic access • Adequate local access • Public transport and local facilities poor	
63	Stoneville Street and Gloucester Road	B1/B2	0.40	**48**	Redeveloped for housing	**n/a**
16B	Liddington Park & Trading Estate	B1/B2	2.59	**48**	• Located to the south of town • Combination of modern office development and more traditional light industrial units • Properties of good /average quality • Poor parking and servicing • Few facilities nearby • Strategic access poor, local access average • Poor public transport	
50	Arle Court, Gloucester Road - Keltruck, Easy Mix	B2/SG	0.91	**47**	• Located in the west close to J11 of the M5 • Excellent strategic access but poor local access • Poor quality buildings • Average parking provision • No local facilities • Average public transport	
46	Milsom Street, Swindon Road and King Street	B1/B2/SG	0.31	**46**	• Conglomeration of office and industrial business premises to the north-west of the Town Centre • Strategic access is fair • Local access is poor • Public transport reasonable • Adequate parking • Poor quality accommodation • Workforce facilities nearby • No scope for expansion	
23	Prestbury Road and Cleevemont Close	B2/SG	2.48	**46**	• Part vacant site • Poor strategic access • Likely to be advanced for mixed use development including employment	
5	Lansdown Industrial Estate, Gloucester Road	B1/B2/B8	5.87	**46**	• Located towards the west of the town adjacent to the main railway line • Over 35 businesses housed in average quality buildings • Strategic access is good • Local access is moderate • Public transport good • Parking provision is adequate • No scope for expansion	
17	Crooks Industrial Estate	B1/B2	0.38	**44**	• Located towards the south of the town • Houses a number of industrial uses in buildings of an average quality	

					• Parking and servicing are poor • Strategic access is poor • Local road access is very poor • Expansion heavily constrained by surrounding residential area	
2F	Advanced Coated Products, Access via Gloucester Rd	B2	1.14	**44**	• Part of wider 1950s industrial development • Shares access with the Vineyards (2E) • Local road access is better than much of the development (i.e. 2a/2b/2c/2d) • Poor parking • Low quality building • Close to rail and bus routes • Little room for expansion	
41	Blacksmiths Lane, Prestbury	B2	0.04	**42**	Redeveloped for housing	**n/a**
35	Francis Street and Exmouth Street	B1/B2/SG	0.07	**39**	Redeveloped for housing	**n/a**