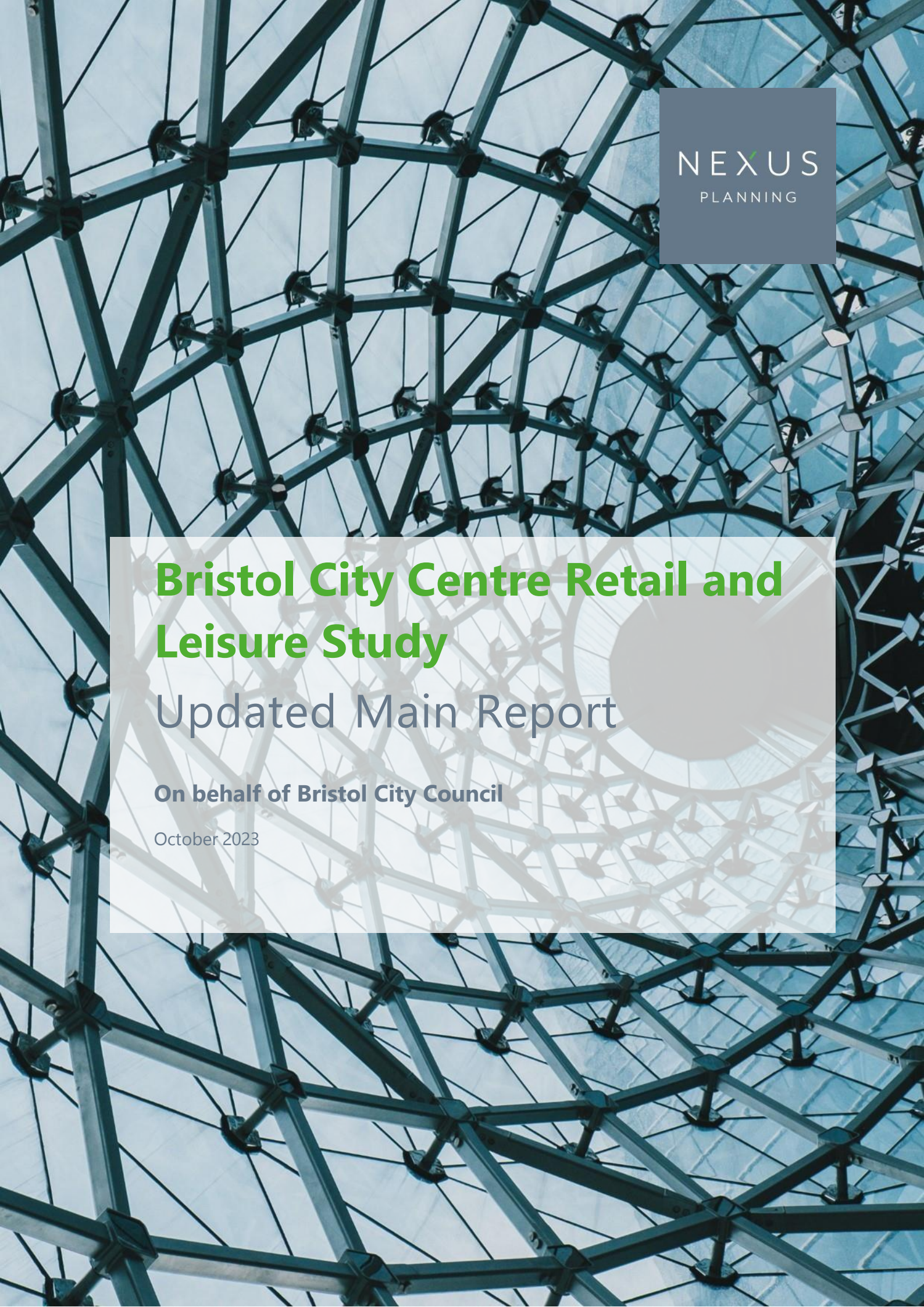

NEXUS PLANNING

Bristol City Centre Retail and Leisure Study

Updated Main Report

On behalf of Bristol City Council

October 2023

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1 Introduction

Instruction and Purpose

1.1 Bristol City Council has commissioned Nexus Planning, working with AspinallVerdi, to undertake a new Retail and Leisure Study focussing principally on the retail, leisure and the offer of other town centre uses in Bristol City Centre.

1.2 The purpose of the Study is to assess the qualitative and quantitative needs for city centre retail and leisure development over the period to 2035; how such needs should be accommodated; and what other improvements are needed to enhance the status and performance of the city centre. The work will also encompass a wide range of stakeholder engagement and market appraisal analysis to establish how the city centre can best adapt to the commercial climate.

1.3 The Study covers a range of key assessments and recommendations including:

- Analysis of future retail and leisure trends, and how these trends have and will impact on the Bristol authority area and city centre in particular;
- Market research and stakeholder consultation to form the basis for the findings of the study;
- A quantitative and qualitative capacity assessment for both retail and leisure needs within the city centre;
- A trading gap analysis, including an audit of the city centre (the primary retail core);
- An assessment of the independent traders within the city centre; and
- The provision of recommendations in respect of policy formulation and future development opportunities within the city centre.

1.4 In terms of physical regeneration, the city centre has seen significant economic and population growth over the last 15 years. There are also a number of major transport, public space and development projects being planned for delivery over the next 5-15 years. The projects are focused around Broadmead, St James Barton Roundabout, Castle Park and the Old City. These developments will be informed by the City Centre Framework, which includes the following objectives:

- Creating a liveable, vibrant, safe and inclusive city centre for the benefit of people of all ages to live, work, learn and enjoy, both during the day and night;

- Tackling traffic congestion and improving air quality;
- Making the city centre better connected, accessible and healthier;
- Supporting the city centre as the core retail, leisure and cultural heart of the region, by enabling regeneration, diversifying uses and promoting the offer; and
- Ensuring the sustainable development of new homes, employment space, enhancement of heritage assets, streets and public open spaces; contributing to a carbon neutral and climate resilient city.

1.5 The draft City Centre Development and Delivery Plan has now been published for consultation, which builds on the Bristol One City Plan and the Bristol City Centre Framework. The Plan will guide on the recovery, regeneration and transformation of the city centre, setting out a vision and high-level principles to guide regeneration. These focus particularly on the Broadmead and Castle Park areas, helping to transform them into more inclusive, sustainable and connected places, and create a green, safe and vibrant city centre.

1.6 One of the key aspects of the city centre remains however and is a key driver of footfall into the regional destination – the retail and leisure floorspace. As such, ensuring that this offer remains the principal use within the centre, and that the Council seeks to plan for the future success of the retail and leisure market is key to its future success. This includes the future protection of the city centre market share, ensuring that out of centre competing destinations do not erode on this market share, to the potential detriment of the overall offer. A key opportunity may be to continue to diversify the offer further, ensuring footfall remains good throughout the week and throughout the day and evening.

1.7 This report presents the key findings relating to population and expenditure in the Study Area, a summary of shopping patterns and how they have altered since the production of the 2013 City Centre Retail Study. Finally, the report provides the findings in respect of the quantitative capacity for additional retail floorspace within the city centre.

1.8 This Study is underpinned by new empirical evidence in the form of a new household shopper survey, and our site visits to survey and assess the health of the City Centre. The household survey was undertaken by NEMS Market Research in August 2020 and covers 11 separate zones, which are collectively considered representative of the principal catchment area for retail facilities within Bristol.

The zones are consistent with those utilised in the previous 2013 Bristol City Centre Retail Study in order to allow comparison of shopping patterns over time.

1.9 A plan of the Study Area is provided at Appendix 1, and the tabulated household survey results are provided at Appendix 2. The Study Area includes parts of neighbouring authority areas where residents sometimes look to facilities in Bristol to meet at least some of their retail and leisure needs.

The Bristol Local Centres Study

1.10 Following Nexus's appointment to prepare the Bristol City Centre Study, Nexus was also appointed in December 2021 to undertake an authority-wide study which focused on the other centres in the defined hierarchy within Bristol, comprising the town, district and local centres.

1.11 The principal purpose of the commission was to undertake a study on the ongoing challenges for Bristol's high streets and opportunities for their revitalisation and reimagining. The need has been identified for a study to assess a variety of short, medium and long-term challenges to the retail and leisure sectors in the authority area, thereby helping the Council and its partners across the city to respond to this fast-changing environment.

1.12 The authority-wide study also seeks to provide a range of recommendations to assist the preparation of the Local Plan for the authority area. The purpose of the Local Plan is to assist the Council in delivering new homes and jobs, whilst safeguarding the valuable environmental assets.

1.13 The authority-wide study is also underpinned by a household survey undertaken by NEMS Market Research, which focuses on a substantially smaller area than that which has been adopted for the purposes of this Study (which we cover in more detail below). The household survey was undertaken by NEMS Market Research ('NEMS') in March 2022 and covers 18 separate zones, which are collectively considered representative of the principal catchment area for retail facilities within Bristol. The number of zones ensures that one of the key outputs of the Study – to better understand the catchments of centres, where people are travelling to and from to meet their retail and leisure needs, and to better understand the potential quantitative and qualitative deficiencies within the authority area – is achieved.

1.14 Given the above, and the availability of a separate household survey which has also been commissioned by the Council to help support the future planning of the defined centres within the authority area, we have therefore provided a separate standalone appendix which provides the capacity findings for the city centre based on the latest household survey from 2022. In light of the

two household surveys covering two different Study Areas of two different spatial areas of Bristol and them being commissioned in different years, the two sets of capacity figures for the city centre are not identical.

Structure of Report

1.15 Our report firstly provides an overview of prevailing retail and leisure trends, before then going on to consider the planning policy context for the Study. We then summarise the key findings of the new household shopper survey, before considering the vitality and viability of the City centre. The remainder of the report is focussed around our assessment of retail needs.

1.16 Accordingly, our report is structured as follows:

- Section 2 identifies current retail and leisure trends of relevance;
- Section 3 provides an overview of the retail and leisure market property report produced by Aspinall Verdi;
- Section 4 provides a summary of the relevant planning policy;
- Section 5 summarises the findings of the in-street surveys in the city centre;
- Section 6 summarised the findings of the stakeholder surveys;
- Section 7 provides and overview of a comparator city analysis;
- Section 8 provides an overview of forecast changes in the Study Area population and expenditure;
- Section 9 provides an overview of spending patterns in the Study Area;
- Section 10 summarises the findings of retail needs;
- Section 11 sets out an updated assessment of leisure needs; and
- Section 12 provides a summary and conclusion of the Study and the overarching recommendations for the city centre, drawn from the baseline survey findings and research.

2 State of the Economy and Trends

2.1 In order to provide a context for this commission and to help identify the sectors that are more likely to be the subject of additional development proposals, we set out a summary of current retail and leisure trends below. In reading the summary, it should be noted that the retail and leisure sectors are dynamic and, whilst online shopping and economic conditions have impacted on the high street, new retailers and formats continue to evolve to meet shoppers' needs.

2.2 The below commentary should therefore be taken as a 'snapshot' in respect of current market conditions; it will be necessary to judge future development proposals for main town centre uses with reference to the prevailing conditions at the time of a proposal's determination. Whilst the impact of Covid-19 on the retail and leisure sectors has lessened in 2022 and 2023, the trading outlook remains challenging due to inflationary pressures and significant increases in the cost of living. We reflect further on the current economic outlook below.

Economic Conditions

2.3 The UK economy was impacted significantly by the Covid-19 pandemic in 2020 and 2021, and by restrictions on movement and behaviour which sought to mitigate its impact. This uncertain background caused retail and leisure expenditure (and business investment) to decline. Household spending fell by over 20% quarter-on-quarter in the second quarter of 2020 following the imposition of national lockdown measures. This is the largest quarterly contraction on record. Retail sales volumes also suffered double-digit falls in April 2020 as all but essential stores closed during the height of the lockdown.

2.4 However, following the gradual reopening of businesses over summer 2020, the economy returned to growth, with this gathering momentum as a greater number of sectors reopened, including hospitality and leisure services. However, a more pronounced resurgence in the number of cases of Covid-19 resulted in the Government reinstating a nationwide lockdown in early 2021. The general economic outlook in 2022 and 2023 has continued to be of concern given very significant increases in the rate of inflation and the general cost of living.

2.5 In February 2023, Experian published its Retail Planner Briefing Note 20 ('ERPBN20'), which identifies anticipated future growth in the retail and leisure sectors and considers likely changes in bricks and mortar retail floorspace and online sales.

2.6 ERPBN20 anticipates that retail spending will be squeezed in 2022 and 2023 as a consequence of inflationary pressure and increases in the cost of living. Page 5 of ERPBN20 provides the following summary of the short-term economic outlook:

'Pay is expected to grow strongly given a tight labour market, though will fail to keep pace with inflation, underpinning a decline in real personal disposable incomes and a curbing of consumer spending. Further out real incomes will recover as inflation subsides, however the rebound in spending is mild given unfavourable demographics and a rising tax burden on households.'

2.7 Overall retail sales are therefore forecast to reduce in the very short term, with growth returning over the medium and longer term. The Covid-19 pandemic has accelerated the shift to online retailing with a consequent reduction in bricks and mortar retail floorspace. As a consequence, the proportion of expenditure committed via special forms of trading (i.e. internet and mail order sales) has increased.

2.8 More generally, as a result of relatively modest growth forecasts and the shift to online retailing, Experian forecasts that there will be a reduction in the stock of retail floorspace over the next few years.

2.9 In terms of inflation, Office for National Statistics data[1] indicates that the rate of inflation (as measured by the consumer price index) increased from 0.8% at April 2020 to 1.5% at April 2021, before then increasing significantly to 9.0% at April 2022. The rate of inflation appears to have peaked at 11.1% in October 2022 and has reduced significantly to 6.8% at July 2023. Retail has been an industry under significant stress, as many retailers find themselves squeezed between rising costs and the increasing volume of sales over the internet. Such difficulties have, of course, been exacerbated by the Covid-19 pandemic and the cost of living crisis associated with rising energy prices and inflation.

2.10 There will still be the need and demand for physical stores, despite the increase in shopping online. This is particularly the case for convenience goods sales given that online shopping orders are typically picked from the shelves of physical stores. In respect of comparison goods, there is a need for the offer to become more 'experiential' in order to encourage shoppers onto the high street, and to ensure that shopping is viewed as a pleasurable pastime. The shopping experience needs to evolve and diversify both to attract footfall and convert increased activity into sales. Independents clearly

[1] ONS 'Consumer price inflation tables' dataset, July 2023.

have an important role to play in adding interest and in providing differentiation between shopping venues.

2.11 In considering the current strength of the retail and leisure sectors, it is important to recognise that different types of retailer have been the subject of different fortunes.

2.12 Non-essential retailers have been impacted by enforced 'lockdown' closures in 2020 and 2021. However, dispensing chemists traded more strongly from March 2020, and their sales continued to be above pre-pandemic levels into 2022 and early 2023. Foodstores also generally traded consistently above their pre-pandemic levels. This was initially due to a degree of stockpiling of grocery goods, but some ongoing boost in sales was evident due to the ongoing prevalence of working from home. Furniture and homeware retailers also generally benefitted from people spending more time in their homes and wanting to improve their own environment. However, in light of increasing inflation and changes to working patterns throughout 2022, it is understood that there has now been a shift away from this pattern.[2]

Available Expenditure and the Impact of the Internet

2.13 Experian expenditure data and growth forecasts confirm that the pandemic has resulted in turbulent short term changes in per capita convenience and comparison goods expenditure. In this regard, ERPBN20 identifies that per capita convenience goods expenditure decreased by 6.7% in 2022 with a further reduction of 2.4% forecast to follow in 2023. This follows a further reduction of 1.4% in 2021. Before this, in 2020, per capita convenience goods expenditure increased by 10.2%. The strong level of growth at 2020 is largely attributable to consumers spending more on such goods as a result of lockdown measures. Limited annual per capita expenditure growth (relative to that which has been achieved historically) is anticipated to return across the medium to long term.

2.14 As the below Table 2.1 indicates, the position in respect of annual per capita comparison goods expenditure has been changeable in the past few years. Whilst annual per capita comparison goods growth of 6.7% was recorded in 2021, this followed a reduction of 6.8% in 2020. Forecast per capita comparison goods expenditure increases over the medium and longer term are positive but still below the level apparent at the turn of the millennium. Experian identifies that UK annual per capita comparison goods expenditure growth decreased from 3.9% at 2017 to 1.0% at 2018, and forecasts that it will remain between 2.8% to 2.9% per annum across the medium to long term.

[2] Article headlined 'Retail sales in Great Britain rise despite cost of living crisis', The Guardian, 19 August 2022.

Table 2.1: Experian's Identified and Forecast UK Convenience and Comparison Goods Per Capita Expenditure Growth

Volume Growth per Head (%)	2018	2019	2020	2021	2022	2023	2024	2025-29	2030-40
Convenience goods	0.1	0.2	10.2	-1.4	-6.7	-2.4	0.4	0.1	0.2
Comparison goods	0.7	2.5	-6.8	6.7	-0.4	-1.6	0.3	2.5	3.0

Source: Figure 1a and Figure 1b of Experian Retail Planner Briefing Note 20

2.15 Whilst the above figures identify a level of growth which is significantly below that which has historically been achieved, the situation for high street stores is exacerbated through the increasing amount of expenditure which is committed through special forms of trading[3] and, in particular, through online sales.

2.16 In this regard, Figure 5 of ERPBN20 indicates that special forms of trading accounted for just over 30% of total retail sales at 2021 as a consequence of Covid-19 and subsequent to very strong growth in online retailing over the past decade. Although the growth in special forms of trading is anticipated to drop back slightly in 2022, Experian anticipates that special forms of trading will again account for over 30% of all retail sales by 2024, increasing to around 36% of retail expenditure by 2033.

2.17 The below Table 2.2 sets out Experian's identified and forecast level of special forms of trading as a proportion of overall convenience and comparison goods expenditure. Experian estimates that special forms of trading will account for more than four out of every ten pounds spent on comparison goods and more than a quarter of convenience goods expenditure at 2033.

Table 2.2: Experian's Identified and Forecast Market Share of Non-Store Retail Sales for Convenience and Comparison Goods Sectors

Volume Growth Per Head (%)	2018	2019	2020	2021	2022	2023	2028	2033	2038
Convenience goods	10.9	12.8	16.6	19.3	19.4	18.6	22.5	24.4	25.5
Comparison goods	21.4	24.5	37.6	38.3	36.0	35.4	39.5	41.5	42.7

Source: Figure 5 of Experian Retail Planner Briefing Note 20

2.18 The ongoing popularity of internet shopping continues to have clear implications in respect of the viability of some 'bricks and mortar' retailers. However, it is important to note that changes in how people shop also bring about some opportunities for retailers trading from the high street. In particular, many stores sell online but fulfil orders from regular stores rather than warehouses[4], with

[3] Including internet sales, mail order, stalls and markets, door-to-door and telephone sales.

[4] This is particularly the case with food shopping and speciality comparison goods purchases, where retailers often try to tap into a wider market through an online presence.

purchases therefore helping to sustain tangible retail floorspace. As a consequence, Experian also provides an 'adjusted' estimate of special forms of trading, which relates to expenditure which is not available to actual stores.

Convenience Goods

2.19 Recent socio-economic conditions have led to significant shifts in convenience goods retailing, which have resulted in the 'big four' supermarket operators' market share being cut. Indeed, analysis from Kantar has identified that the traditional 'big four' supermarket operators are no longer such, with Aldi's market share overtaking that of Morrisons over the 12 weeks to 4 September 2022. Over this period, Aldi's market share of 9.3% was ahead of Morrisons' share of 9.1%.[5]

2.20 Mintel[6] finds that the decline of the food superstore is well established and that this can be attributed to two matters.

2.21 Firstly, people are undertaking food shopping in different ways. More people are living in town and city centres and are generally purchasing their own home at a later age than was previously the case.[7] Mintel indicates that such people are more likely to undertake food shopping on an 'as needs' basis and are more likely to eat out or use takeaways. As such, they are less likely to have need to undertake a weekly 'main food shop'.

2.22 Secondly, the current uncertainty in the economy has made discount foodstore operators (namely Aldi and Lidl) a more attractive proposition, and many such foodstores are thriving given that shoppers are currently having to be 'money savvy'. Discounters have also made efforts to try to compete more directly with the 'big four' supermarket operators, with larger stores, greater ranges of goods, fresh foods, and premium products becoming increasingly prevalent. It is evident that the likes of Aldi and Lidl are no longer 'hard discounters' in quite the same way they once were, as they now fulfil a wider range of customers' needs by offering a greater range of products. The move towards the middle ground has allowed discounters to secure market share from both superstores and smaller convenience stores. In addition, we note that discount retailers are often happy to trade alongside more upmarket convenience goods retailers (such as M&S Foodhall) as, collectively, the two stores can meet a comprehensive range of grocery shopping needs.

[5] Article headlined ''Big four no more': where now for UK grocers as Aldi overtakes Morrisons?', The Guardian, September 2022

[6] 'UK Retail Rankings', Mintel, April 2018.

[7] Article headlined 'Average UK first-time buyer is now older than 30, says Halifax', The Guardian, January 2022.

2.23 The shifts in the sector are illustrated with reference to changes in retailers' market share in recent years, as shown in Table 2.3.

Table 2.3: Market Share of Convenience Goods Operators

Operator	December 2016	December 2017	December 2018	December 2019	December 2020	December 2021	December 2022
Tesco	28.4	28.1	27.8	27.4	27.3	27.9	27.5
Sainsbury's	16.5	16.5	16.1	16.0	15.9	15.7	15.5
Asda	15.3	15.3	15.2	14.8	14.3	14.2	14.0
Morrisons	10.8	10.8	10.6	10.3	10.4	10.1	9.1
Aldi	6.2	6.8	7.4	7.8	7.4	7.7	9.1
Co-op	6.3	5.8	5.9	6.1	6.0	5.8	5.6
Lidl	4.6	5.0	5.3	5.9	6.1	6.3	7.2
Waitrose	5.1	5.2	5.0	5.0	5.0	5.1	4.7
Iceland	2.2	2.2	2.2	2.3	2.5	2.4	2.5
Symbols & Independent	1.8	1.7	1.5	1.6	1.7	1.6	1.4
Other Outlets	1.7	1.6	1.7	1.6	1.8	1.8	1.8
Ocado	1.1	1.1	1.2	1.3	1.6	1.7	1.7

Source: KANTAR Grocery Market Share. Figures shown are for the final reporting period in each calendar year.

2.24 The past few years has seen the closure of a number of unprofitable grocery stores (from small convenience stores to large superstores) and the continuation of Aldi and Lidl's expansion programme. Aldi announced in September 2023 that it intends to open another 500 stores in the coming years.[8] Lidl intends to open a further 250 stores across the UK.[9] Whilst the 'big four' remain more cautious in respect of new openings, a limited number of proposals for mid-sized foodstores are currently being promoted by these operators in areas where there is a growing population or an obvious shortfall in existing provision. These stores are often of a scale that is broadly comparable to that provided by Aldi and Lidl, which allows customers to shop in a convenient and efficient manner.

[8] Article headlined 'Aldi claims it is increasingly shoppers' main supermarket for weekly shop', The Guardian, 8 September 2023.

[9] As set out in the press release headlined 'Lidl continues to search to secure sites for new stores', 24 April 2023 (https://corporate.lidl.co.uk/media-centre/pressreleases/2023/lidl-continues-search-to-secure-sites-for-new-stores).

Comparison Goods

2.25 The comparison goods sector is currently being squeezed by a number of factors, including increasing operator costs and a reduction in discretionary spending as a result of increases in the cost of living.

2.26 Whilst the sector is continually evolving and there are a number of retailers performing well (including JD Sports, Next, Primark, and Zara), recent headlines have focused on failing retailers and store closures. High profile retailers that have struggled include Debenhams, which announced the closure of all 124 stores in December 2020[10], and the Arcadia Group, which owned Topshop, Topman and Dorothy Perkins. Arcadia Group announced the closure of around 500 stores in February 2021.[11] Furthermore, Intu Properties, one of Britain's biggest shopping centre owners, fell into administration in June 2020 after failing to secure an agreement with its creditors.[12] More recently, Wilko entered into administration in August 2023 and (at the time of reporting) attempts to salvage the business appear to have failed.

2.27 Whilst the loss of some of the above names will have significant repercussions for certain towns (particularly those that have lost one or more of Debenhams, Marks & Spencer, Wilko, or House of Fraser from their high street), some well-known retailers have failed to 'move with the times' and update their offer, accommodation, and online presence. This is partly a consequence of retailers struggling to reinvest in their business when margins are tight (or non-existent).

2.28 Many operators have also rationalised their portfolio with the aim of serving the UK by concentrating on larger centres, supplemented by a strong online presence. It will be interesting to see whether any permanent change in respect of working from home may act to counterbalance this 'polarisation' trend, given the prospect of fewer commuters travelling to larger centres and greater numbers of people spending the working day in and around their home. The impact on larger centres may be to reduce footfall, particularly within the week, and result in the shift in expenditure being directed to the smaller town, district, and local centres. Whilst this will be a positive for the smaller centres, larger centres may suffer as a result.

2.29 Whilst structural changes have had a material impact on the vitality and viability of many UK high streets, there are some beneficiaries. Notwithstanding Wilko's recent difficulties, some 'discount

[10] Article headlined 'Debenhams set to close putting 12,000 jobs at risk', BBC, 1 December 2020.
[11] Article headlined 'After Topshop owner Arcadia's demise, what now for UK clothes shopping?' The Guardian, 13 February 2021.
[12] Article headlined 'Shopping centre owner Intu collapses into administration', The Guardian, 26 June 2020.

variety' operators, such as B&M Bargains and Poundland, have taken advantage of lower rents and reoccupied a number of medium to large retail units. However, as evidenced by recent events, the discount variety market may be approaching capacity.

Leisure and Food & Drink

2.30 The greater availability of high street units appears to have helped stoke an entrepreneurial spirit in recent years, with a number of centres beginning to benefit from a greater focus on independent retailers and also modern markets, which are frequently focused around food and drink operators.

2.31 More generally, the food and drink sector was buoyed pre-pandemic by the success of mid-market national multiples, which expanded quickly across the UK. However, this market has become saturated in many locations and a number of high profile operators have been in financial difficulty. Given the problems suffered by such operators, the market has become more cautious and mid-market operators are picking new sites carefully as a result. Instead, we have seen a number of independent operators flourish, both before and throughout the pandemic, and a desire for customers to choose local operators over larger regional and national brands.

2.32 A further significant recent high street success story has been the resurgence of the town centre leisure sector, which has resulted in new cinemas being developed close to the shopping core and the emergence of 'competitive socialising' concepts, which include bowling, crazy golf, table tennis, darts, axe-throwing, escape rooms and other seemingly niche pursuits.

2.33 Cinema openings have been on the up in recent years (until the Covid-19 pandemic) and 'boutique' cinema operators – including Curzon, Everyman, and The Light – are able to operate from smaller sites in town centres (partly as a consequence of digital technology). Town centre cinema development has successfully underpinned wider mixed-use developments, as food and drink operators are typically keen to locate in close proximity to benefit from spin-off custom. New, innovative leisure operators have been particularly beneficial both in re-using existing difficult to let premises, and in driving the evening economy.

2.34 More generally, the gym market continues to perform well, with there now being around 7,200 health and fitness clubs across the UK, which are estimated to have a total turnover of approximately £2bn.[13] Around one in every seven Britons has a gym membership. Budget gyms are currently particularly

[13] 'Number of health clubs in Europe in 2020, by country' dataset, Statistica, 27 October 2022.

popular, with operators such as Pure Gym, the Gym Group, and easyGym utilising a format that is based on low costs and high volume.

The Night-Time Economy

2.35 The term night-time economy is used to describe a wide range of activities that (typically) take place after 5 pm. This could range from a trip to the theatre or cinema, to a family meal, to a night out at a club. A successful night-time economy generally caters for a wide range of demographics and interests.

2.36 Creating a safe, vibrant and well-balanced evening and night-time offer is a challenge that can dramatically improve the overall health of a town centre and boost the economy.

2.37 The Association of Town and City Management ('ATCM') has identified a number of themes to help improve the attraction and operation of the night-time economy, which are summarised as follows:

- **Alive After Five** – This relates to revisions to trading hours to better suit customers' shopping needs and availability. A Retail Trading Hours Study commissioned by ATCM found that sales between 5 pm and 8 pm are typically 50% greater than those between 9 am and 11am. Revising trading hours to open and close later could increase sales by around 10% to 12%.
- **Late Night Transport** – The lack of frequent, efficient and safe public transport late at night, or at least the perception of this being the case, could be having an effect on night-time economy and socials scenes. One way of increasing night-time visitor numbers is to promote late-night travel provision and its publicity.
- **Purple Flag** – This is an accreditation scheme which recognises excellence in the management of town and city centres at night. Obtaining Purple Flag accreditation demonstrates that a town's night-time economy offers clean and safe environments, great bars and clubs, a variety of arts and cultural attractions, and excellent transport links.
- **Evening Economy Ambassadors** – The ambassadors improve the evening and night-time experience in a town centre by liaising between visitors, police, door staff, licensees, and transport operators.
- **Light Night** – This is an initiative where town or city centres stays open after dark for people to enjoy local shops and services within a wider cultural event involving music, art and, most importantly, through the lighting up of buildings and light-based art installations.

2.38 The above list is not exhaustive, and the development of a bespoke evening economy strategy can help prioritise and deliver events and initiatives which draw on a town centre's strengths and address weaknesses.

Planning Reform on the High Street

2.39 One of the most impactful planning reforms in recent times has been the consolidation of a number of separate Use Classes under a single Class E 'Commercial, Business and Service' use. This update to the Town and Country Planning (Use Classes) Order 1987 (the 'UCO') came into effect in September 2020. The new Use Class combines shops, restaurants, offices, gyms and nurseries (amongst other uses) such that planning permission is no longer required to switch uses.

2.40 Furthermore, in March 2021, an update was made to the General Permitted Development) (England) Order 2015. This allows for the change of use from Class E properties to residential from August 2021 (extending a right that had previously been restricted to office uses). This permitted development right is subject to maximum size requirements, the property having been in use as Class E for two years and having been vacant for three months. An application to the determining authority for 'prior approval' is also required for limited consideration of impacts relating to transport, contamination, flood risk, noise, light, and neighbourhood amenity. Further limitations apply in Conservation Areas and for nurseries, as well as in areas covered by 'Article 4 directions' where permitted development rights are extinguished.

2.41 On 20 July 2021, paragraph 53 of a new iteration of the National Planning Policy Framework ('NPPF') set out limitations on the use of Article 4 directions. The revised national policy seeks to qualify the areas in which it is justified to introduce Article 4 directions, limiting local authorities' ability to control development.

2.42 The changes in the application of Article 4 directions were first put forward in the January 2021 consultation for draft revisions to the NPPF. However, the actual policy provision differs from the initial consultation in a couple of key areas. Paragraph 53 of the NPPF recognises that the loss of the 'essential core of a primary shopping area' could result in wholly unacceptable adverse impacts on an area's vitality and viability. This is the Government's first acknowledgement of the potential for the permitted development rights to undermine the health of centres in the NPPF. The updated text also introduces a requirement for 'robust evidence' to support the removal of development rights.

2.43 This can be seen as generally good news for local authorities concerned about the erosion of retail and service uses, and the need to protect vulnerable centres from potentially poor quality residential development. Protection of the vitality and viability of a high street or town centre against the adverse impacts of change of use is now established as justification for issuing an Article 4 direction.

2.44 In addition to the above, the Levelling Up and Regeneration Bill is currently making its way through Parliament. The Bill seeks to provide for a more streamlined, focussed plan-making process so that local plans and minerals and waste plans can be produced, examined and adopted more quickly, and updated more often.

2.45 Of particular relevance to town centres is the Bill's intention to confer on local authorities the power to hold rental auctions for vacant commercial premises located on high streets and defined town centres (the High Street Rental Auction Process).

2.46 Further detail in respect of the proposed process is provided by High Street Rentals consultation document which was published in March 2023. Paragraph 8 of the consultation document confirms that:

'As part of the Levelling Up and Regeneration Bill, introduced to Parliament on 11 May 2022, the government is introducing High Street Rental Auctions, a new power for local authorities to require landlords to rent out persistently vacant commercial properties to new tenants, such as local businesses or community groups.'

2.47 Paragraphs 9 and 10 then go on to provide further clarification as to how the process would work in practice. These paragraphs state that:

'High Street Rental Auctions will be a permissive power for local authorities which aim to tackle the problem of persistently vacant property on high streets by empowering places to bring vacant units back into use. As an addition to a range of tools local authorities might use when attempting to regenerate an area; they will seek to increase cooperation between landlords and local authorities, and to make town centre tenancies more accessible and affordable for tenants, including small businesses and community groups.

High Street Rental Auctions will allow local authorities to auction the rental rights of commercial high street property that has been vacant for longer than 12 months in a 24-month period. Successful bidders will enter into an agreement for lease with the landlord upon completion of the auction, and then a lease of between one to five years following completion of any pre-tenancy works.'

2.48 The objective is to reduce the number of vacant premises and ensure that short to medium-term meanwhile uses can help drive footfall on the high street.

3 Retail and Leisure Market in the City Centre

City Centre Context

3.1 As part of the overview of the city centre, it is useful to understand the context of the key areas and offer, and to consider how these key elements work together to provide the residents with retail, leisure, other commercial and residential facilities.

3.2 For the purposes of this Study, the city centre is broadly split into four areas by Experian Goad:

- Broadmead;
- Baldwin Street;
- Christmas Steps; and
- Queens Road.

3.3 Broadmead comprises the principal retail and leisure area of the city centre, which includes the highest proportion of national multiple operators. The key areas include Cabots Circus, which is a modern undercover managed retail and leisure centre accessed off The Horsefair and Penn Street.

3.4 Broadmead is the other key retail and leisure area of this part of the city centre, which is pedestrianised and runs east to west, with the public square in the centre which connects to Merchant Street running north to south between The Horsefair and Broadweir in the south.

3.5 Located off Broadmead is The Galleries Shopping Centre, which is internally facing, with the key access points off Merchant Street and secondary access off Broadmead. The car park is situated in the southern part of the shopping centre, facing onto Castle Park.

3.6 The Old City (Baldwin Street) is the historic heart of Bristol. It is centred around St Nicholas Market and the Glass Arcade located off Corn Street. The area is generally characterised by independent retailers and a high number of leisure uses and has a dominant evening economy. The area is also home to Bristol Old Vic, and a number of hotels such as the Bristol Harbour Hotel & Spa, Radisson Blu and the Mercure Grand Hotel.

3.7 The area around Christmas Steps is considered to be the arts quarter of Bristol. This shopping area dates back to the 1600s and is centred around the iconic stepped lane named Christmas Steps. The area is characterised by independent and niche retailers, and it is the location of unique shops, pubs,

cafes, restaurants, art galleries, potteries, makers of dresses, shoes, musical instruments, furniture, and other creative outlets. It is also the home to the Bristol Beacon concert hall.

3.8 Finally, Queens Road is the area to the north west of the city centre. The area includes the Bristol Museum and Art Gallery, alongside the University, comprising national multiples such as Sainsbury's, and a range of independent operators on Park Street. The offer ranges between convenience and comparison retailers, leisure operators and a range of service and financial businesses. At the southern end of the area is College Green which also includes a diverse range of commercial uses and beyond College Green itself along Anchor Road is the Bristol Hippodrome and associated leisure offer.

Convenience Offer

3.9 The city centre's main convenience retail offer is principally limited to facilities which provide for a top-up function. The convenience retail offer within the Broadmead area is provided by Tesco Metro at the western end of Broadmead and Sainsbury's Local, which occupies a ground floor, corner unit at the eastern end of Broadmead, adjacent to Cabot Circus.

3.10 Within the Old City, the convenience offer is principally focussed around the Tesco Express and Co-operative both located on Baldwin Street, and the Sainsbury's Local on Broad Quay.

3.11 The convenience and comparison offer within the Old City is also supported by the St Nicholas Indoor Market located between Corn Street, Exchange Avenue, All Saints Lane and Glass Arcade. It is home to 63 independent retailers selling gifts, fashion, accessories, books, records and food.

3.12 There is only one convenience store in the Christmas Steps area, Colston Mini Market.

3.13 Queens Road provides for a more diverse convenience offer with the presence of the Sainsbury's and Waitrose which are larger than the convenience stores within the remainder of the city centre and provide for both main and top-up shopping needs, albeit still serve a local walk-in catchment focused principally around the student population.

Comparison Offer

3.14 Bristol City Centre's comparison offer is diverse and spread across the city. The principal national multiple provision is provided within Cabot Circus and along Broadmead (and surrounding commercial area). Key national multiples in the area include House of Fraser, H&M, JD, Harvey Nichols and Next within Cabot Circus, and outside along Broadmead and The Horsefair are operators such as Primark, Boots, WHSmith and so on. However, as we go on to discuss further below, the closure

of Debenhams along The Horsefair has resulted in a reduction in the comparison offer in the northern part of the city centre, and a large vacant frontage in the primary shopping area of the city.

3.15 The Galleries also provides for an important comparison offer along Broadmead. Retailers include Argos, Bonmarche, Game, Poundland, Waterstones, Trespass and Savers and includes a range of independent retailers alongside leisure and service operators such as Supercuts, Burger King, Café Nero, Greggs (x2) and Subway. The Galleries is arranged over three floors, with the principal access either side of Jack Wills, and three further pedestrian access points off Broadmead and Union Street.

3.16 Outside of Broadmead and within Old City, Baldwin Street and along Queens Road, are a variety of principally independent comparison operators. Operators include clothing and footwear businesses but also a wide variety of charity shops, antique stores, music stores, bike shops, florists and jewellers.

3.17 Within Old City, the principal comparison attraction is St. Nicholas Market, which includes a number of independent operators selling a wide range of goods. Whilst Christmas Steps provides for a range of comparison operators, again principally focussed around the independent sector, there are no substantial 'anchors' which act as footfall attractors in their own right.

3.18 Queens Road includes a range of retail operators including Mountain Warehouse, Boots and the Body Shop, alongside a range of independent comparison operators selling clothing, footwear, stationery, jewellery and homewares.

Food and Drink and Other Leisure Offer

3.19 The city centre provides for a range of food and drink offer, including a range of café, takeaway and other 'food to go' operators, alongside a range of restaurants and bars.

3.20 Key operators within Cabot Circus include Cote Brasserie, TGI Fridays, Piccolino, Pizza Express and Nando's, and cafes such as Café Nero, Costa and Pret. Wagamamas is present within Cabot Circus and along Queens Road.

3.21 Outside of Cabot Circus, the offer along Broadmead is focussed around sandwich shops and coffee shops including Pret a Manger and Greggs and a number of independent cafes. Furthermore, the food court at the Galleries includes operators such as Burger King, Caffe Nero, Greggs and Chopstix.

3.22 In the wider city centre, the offer is mixed between national multiples and independents and includes higher end operators such as San Carlo and Cosy Club, and independents such as Giuseppe's, Marmo and Mugshot.

3.23 There are a range of pubs and bars across the city centre catering for a wide market, including those focused towards the student population, more 'traditional' pubs and modern bars. Within Christmas Steps for example, the food and drink offer includes the modern Zero Degrees micro-brewery and restaurant on Colston Street, as well as a number of independent cafes, most of which are concentrated along Upper Maudlin Street. Along Queens Road and the surrounding area, the offer of bars and restaurants is mixed and clearly caters for its specific demographics.

3.24 The wider leisure offer within the city is also mixed, with the Showcase Cinema DeLux at Cabot Circus and the Odeon cinema on Union Street. The Lanes on Nelson Street provides for a bowling facility with associated bar and restaurant, serving the nighttime evening function. The actual provision of other commercial leisure offer within and surrounding Broadmead is therefore relatively limited, with the principal focus being around the daytime economy.

3.25 However, the Queens Road area includes the Bristol Hippodrome and the Bristol Museum & Art Gallery, alongside other key leisure attractions such as nightclubs and function venues, which diversifies the offer and provides activity throughout both the day and the evening.

Market Offer

3.26 An important part of the city's wider offer are the existing markets. We provide an overview of the key market provision within the city centre below.

3.27 **Bristol Farmers' and World Food Market** (every other Wednesday, 9.30am to 2.30pm) is situated on Corn Street in the City Centre and provides an opportunity for independent traders from across the city to sell fresh produce.

3.28 **St Nicholas Indoor Market** (Monday-Saturday, 9.30 am-5 pm) is located between Corn Street, Exchange Avenue, All Saints Lane and Glass Arcade. It was named Britain's Best Large Indoor Market in 2016. It has been trading since 1743 and has Bristol's largest collection of independent retailers. It is home to 63 independent retailers selling gifts, fashion, accessories, books, records and food.

3.29 The market is divided into three sections:

- Exchange Hall is a large open plan trading area with a broad collection of items for sale.
- Covered Market is home to a variety of self-contained businesses including books, records and gifts.

- Glass Arcade is home to a unique offering of world foods including Caribbean, Italian, Moroccan and British cuisines.

3.30 **Finzels Reach Market** is located on the south side of the River Avon close to Bristol Bridge on Old Temple Street. Finzels Reach Market is held every Wednesday and Friday between midday and 2pm. The market hosts a diverse range of local producers and is focused around a street food market in a pedestrian space situated in the new development at Finzels Reach. Food traders from across the wider South West serve a varied range of goods, including gourmet pies, fresh pizza, baked goods and dishes from around the world.

3.31 **Corn St Flea Market** has been in operation for approximately five years, the Corn Street Flea Market is focused around comparison goods stall operators selling antiques, vintage, retro, furnishings, furniture and a range of second hand goods. The market is held on a Saturday between 9am and 5pm and is located in close proximity to St Nicholas Market, and as such has been able to take advantage of these links to build a strong customer base who frequent the market and underpin its ongoing strength.

3.32 **The Harbourside Market** operates two markets, both of which are street food orientated, from its location on Anchor Road to the north west of Queen Square. The market is open between 12pm and 2:30pm on Wednesday and Thursday, and 11am and 4pm on Saturday and Sunday. The weekday street food market, which has been trading since 2014, provides a range of food and drink operators and seeks to take advantage of the Market's waterfront location with a range of entertainment provided.

3.33 **Temple Quarter Market** is held every Thursday between midday and 2pm, Temple Quarter Market is located just to the north of Temple Meads Station. Its offer is primarily focused around food and drink and hosts a diverse range of street food operators which serve the community in the Temple Quay business quarter. These operators vary week-on-week, and as such the market benefits from having a diverse and ever changing range of stalls and food offer.

3.34 The markets are popular, well-managed shopping destinations for local residents and day visitors. The markets are very successful and a major attraction, positively contributing to the unique character of Bristol City Centre and its wide-ranging shopping and food and beverage offer. The markets should therefore be maintained and, where possible, enhanced.

Vacancies

3.35 As set out above, there are a number of notable vacant units within the city centre which are in part key to help guide the future strategy for the centre. Key vacancies include the Debenhams on Horsefair, units along Broadmead and within the Galleries, and in more peripheral parts of the city centre.

3.36 The remainder of the centre includes a variety of vacant units ranging in size and nature and are typically scattered across the centre. Within Broadmead for example, the vacant units within the Galleries range from as small as 20 sq.m to 2,220 sq.m. Within Cabots Circus, the vacant floorspace also ranges from 90 sq.m up to 640 sq.m. Within the Christmas Steps area of the city centre the previously largest vacant unit has subsequently been redeveloped into student accommodation. Within Baldwin Street, there has also been a positive sign in terms of the reuse of floorspace at Corn Street, with the investment into the conversion of Gilbert House for office use. Along Park Row and Queens Road heading to the north west of the city centre, the vacant units are scattered and range from approximately 40 sq.m to 770 sq.m. The larger of the vacant units is situated off Berkeley Place and was set to become a family play centre but it is understood that due to works required on the adjacent car park, the entertainment centre has yet to open.

3.37 Within Broadmead as of October 2021, the proportion of vacant floorspace equates to approximately 17.2% of the commercial floorspace, which is above the national average of 13.9%. In terms of the proportion of units currently vacant, this equates to 21.7%, compared to a national average of 14.2%.

General Environmental Quality and Pedestrian Movement including Accessibility

3.38 The pedestrianised area along Broadmead and into Cabot Circus is generally of good quality and provides a safe and pleasant environment to walk and cycle through the City Centre. The area around Horsefair is dominated heavily by traffic and particularly bus movements, which provides for a less safe environment for pedestrians. There is an opportunity to enhance the overall environment in the peripheral areas of the city centre and particularly the northern and western areas in order to encourage footfall throughout the centre.

3.39 There are some attractive historic parts of the city centre which provide for pleasant environments for visitors to sit and enjoy the area. There is also good access to existing open and green space surrounding the city centre, and particularly to the south as Castle Park, although the existing frontages onto Castle Park along Broad Weir perhaps detract from the northern edge of the green space to some degree. The Bearpit is surrounded by St. James Barton Roundabout and is therefore

not an attractive environment to enjoy and St. James' Park is relatively small in comparison but does provide space for visitors to sit.

3.40 However, the College Green and the crescent shaped building fronting onto this greenspace is particularly pleasant and is well used for visitors and residents to enjoy and meet friends. In addition, the general aesthetics including shop fronts and public realm up Park Street and onto Queens Road is good and provides for a pleasant environment for shoppers.

3.41 The vacant units throughout the centre and particularly at the public square where Broadmead meets Merchant Street detract from the overall aesthetics, and there is an opportunity here to create an enhanced public square which could provide a space for informal events throughout the year.

3.42 The Old City area generally benefits from an attractive and pleasant environment. It is covered by the City and Queen Square Conservation Area and has a range of historic buildings and listed buildings. The historic environment has a positive impact on the attraction and character of the area, and the 'sense of place', but clearly limits the potential for new (physical) redevelopment and regeneration. There is limited graffiti and littering, and overall this area feels rather safe and inviting. However, Leonard Lane is heavily graffitied and littered, and its narrow nature gives the street a very unsafe perception.

3.43 The centre is well served by bus, metrobus and train services. Bus stops are located along The Horsefair, Penn Street, Broad Weir and Union Street, along with other less central locations within the city centre. The bus stops also link the city centre with Temple Meads Railway Station, which can also be accessed on foot travelling to the south across the Bristol Bridge. The route is relatively level, with good and safe pedestrian crossings across main roads. However, there are opportunities to enhance the link from Broadmead to Temple Meads to increase the legibility and overall attractiveness in order to encourage further trips between the two. The centre is also accessible on bike, with numerous options for cycle parking throughout the key areas of the centre. There is also an opportunity to enhance dedicated cycle routes to and from the city centre and through the key routes.

3.44 In terms of car parking, there are a variety of opportunities throughout the centre, including at the main shopping centres and within a series of NCP and surface level car parks.

3.45 The Bristol Transport Strategy sets out a range of further supporting measures to encourage walking and cycling, which includes a series of objectives to enhance the safety, legibility and aesthetics of

key public transport routes within and connecting to the city centre in order to draw more shoppers in by foot from surrounding areas.

The Commercial Market

3.46 Aspinall Verdi have produced a Property Market Report in order to understand the ongoing challenges for Bristol's retail and leisure sectors. A full copy of the Property Market Report prepared by Aspinall Verdi is provided at Appendix 3. However, the key findings of the report relating to the retail, leisure and residential market research are summarised below.

3.47 Bristol is currently seeing a significant level of development and investment across the City centre, including retail, leisure, housing, student accommodation, tourism development and offices. The Council has been working to facilitate this growth through the Bristol Central Area Plan (2015) and an emerging City centre Framework, which will set out aspirations for development, movement and public realm improvements.

3.48 At the time of writing the Property Market Report the longer-term impacts of Covid-19 upon the retail and leisure markets are difficult to identify. Issues currently being considered include:

- The future of physical retailing from bricks and mortar stores. With online retailing having been given a boost, whether this trend will continue to accelerate and grow.
- The nature of office occupation and spaces may change with demand, changing and the purpose of such spaces.
- Whether housing demand for urban apartments will change – with a preference for homes with gardens or as an alternative balcony /courtyard space.
- What role will centres play? Better experience, more leisure, residences, open space?

Retail Summary

3.49 At Section 2 of the Property Market Report, it is set out that the COVID-19 pandemic has accelerated the downturn in the retail sector. This is highlighted by data from the Centre for Retail Research, which shows that the number of retail stores going into administration in the first half of 2020 is already above last year's total. Further to this, the Deloitte Consumer Tracker[14] hit a record low in the first quarter of 2020, as the impact of COVID-19 unfolded in the UK.

[14] The Deloitte Consumer Tracker Q3 2020

3.50 The Bristol Shopping Quarter (Broadmead, The Galleries and Cabot Circus) forms the core high street retail offer and is where the majority of national multiples are located. Other important shopping areas include Park Street/Queens Road, Old City, Stokes Croft, Old Market and Christmas Steps/Colston Street.

Leisure Summary

3.51 In respect of leisure, consideration has been given to the food & beverage market, hotels and 'urban leisure' space. As is the case with retail spending, the COVID-19 lockdown has severely suppressed leisure spending, by removing virtually all opportunities to spend outside the home and forcing consumers to favour in-home leisure activities.

3.52 Bristol's food & beverage offering is split largely between the Bristol Shopping Quarter which is primarily home to the larger national multiples, although these do have a presence across the city. Our market research also identified a number of local or independent operators taking space on a leasehold basis located on Park Street and Stokes Croft.

3.53 This suggests the city's food & beverage offer is growing and diversifying and this is a trend consistent with the wider food & beverage market which has occurred alongside traditional A1 uses closing as discussed in the market overview section. However, the sustainability of this growth has started to be questioned with a number of casualties within the food & beverage sector.

3.54 In terms of hotels, this is a difficult market to analyse specifically at a city level. PwC predicted that the UK hotel trading performance is set to decline significantly in 2021 due to the impact of the COVID-19 pandemic. Currently, Bristol's hotel offer is comprised of traditional / independent, budget and serviced apartments. However, there is a lack of luxury hotel accommodation in Bristol City Centre as such operators tend to focus on key cities with both a substantial tourist attraction, but also a strong office market. Were the city to see a growth in its tourism and leisure offer, as well as more office-led development then this is a potential market to be exploited.

3.55 Arguably the most important form of leisure space is what we have referenced as 'urban leisure'. With consumer spending patterns changing to focus more on experiences than physical items, there has been a growth within this market and Bristol itself has seen a number of new urban leisure operators moved in such as:

- Multiple Escape Rooms
- Jungle Rumble Adventure Golf – Cabot Circus

Residential Summary

3.56 The Property Market Report also includes a high-level review of the city centre residential market utilising Land Registry, Rightmove and Zoopla. This review has identified a number of schemes in the city centre, including the Wapping Wharf development located within the Bristol Central Area which currently (January 2021) has a range of new build apartments on the market. Asking prices range between £257,500 and £282,500 for one-bedroom apartments, between £362,500 and £390,000 for two-bedroom apartments and between £550,000 and £595,000 for three-bedroom apartments.

3.57 Further to this, Aspinall Verdi identified two schemes where apartments have been sold within the past two years (2018 – 2020). Brandon Yard located along the northern section of Bristol's Harbourside, lying opposite Brunel's SS Great Britain and New Yard on the site of the former Bristol General Hospital.

3.58 Aspinall Verdi have also reviewed rental values for newer one- and two-bedroom apartments in Bristol City Centre. Rental values for one bedroom apartments range between £950 - £1,025 pcm and for two-bedroom apartments between £1,250 - £1,435 pcm.

3.59 The Property Market Report also identifies a number of schemes in the pipeline across the City Centre, including three private rented sector schemes. This is a growing sector nationwide, and as highlighted can overcome issues with viability where there is investor demand for a large number of units.

3.60 The Property Market Report considers that encouraging residential development within and around the city centre is vital to the future growth and sustainability of Bristol because increasing the population density within the city will help generate footfall and demand within the centre for retail and leisure uses. It will enable the evening economy to become more sustainable and add vibrancy into the evening.

4 Planning Policy Context

4.1 In order to shape the direction of this Study, it is helpful to understand relevant retail and town centre planning policy at a national and local level. As such, we first summarise national planning policy of relevance before considering relevant development plan policy as set out in the Bristol Core Strategy. We also consider changes to the Use Classes Order and the application of permitted development rights to town centre uses.

Revised National Planning Policy Framework

4.2 The most recent iteration of the National Planning Policy Framework ('NPPF') was published in July 2021. The NPPF reflects the fact that the traditional role of town centres has been somewhat undermined by structural changes in the retail sector, and that there may be a need to plan for a more diverse range of uses going forward. As such, the NPPF advocates a more flexible policy framework to support the future vitality and viability of town centres.

4.3 NPPF policies are considered on a thematic basis below.

Plan-Making

4.4 Paragraph 20 of the NPPF indicates that development plans should set out an overall strategy for the pattern, scale and quality of development, including policies to deliver retail, leisure and other commercial development. Paragraph 31 states that the preparation and review of all policies should be underpinned by relevant and up-to-date evidence. This should be proportionate and take into account relevant market signals.

Building a Strong, Competitive Economy

4.5 Paragraph 81 of the NPPF indicates that planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development.

Ensuring the Vitality of Town Centres

4.6 Paragraph 86 specifically relates to planning for town centres. It states that:

'Planning policies should:

a. **define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;**

b. **define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;**

c. **retain and enhance existing markets and, where appropriate, re-introduce or create new ones;**

d. **allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;**

e. **where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and**

f. **recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.'**

4.7 The requirement to plan to meet needs across a minimum ten year period represents a change from the previous NPPF which required town centre needs to be met in full across the entire plan period.

4.8 In addition, it is notable that the NPPF Annex 2 Glossary fails to make any reference to the designation of primary and secondary frontages. Page 32 of the Government Response to the Draft Revised National Planning Policy Framework Consultation[15] indicates that, whilst the revised NPPF has removed the expectation in national planning policy that such frontages must be defined, this does not necessarily preclude authorities from doing so where their use can be justified. However, it is evident that the general intention is to provide for more flexibility through a less prescriptive approach to land use.

4.9 Paragraph 90 of the NPPF states that it is appropriate to identify thresholds for the scale of edge of centre and out of centre retail and leisure development that should be the subject of an impact assessment. Any such threshold policy applies only to the impact test. All planning applications for

[15] Published July 2018.

main town centre uses that are not in an existing centre and not in accordance with an up-to-date development plan will generally be the subject of the sequential test[16].

Promoting Healthy and Safe Communities

4.10 Paragraph 93 seeks to support the social, recreational and cultural facilities and services the community needs.

4.11 As such, planning policies and decisions should:

- plan positively for the provision and use of shared spaced, community facilities (such as local shops, meeting places, sports venues, open space, cultural buildings, public houses and places of worship), and other local services to enhance the sustainability of communities and residential environments;
- take into account and support the delivery of local strategies to improve health, social and cultural well-being for all sections of the community;
- guard against the unnecessary loss of valued facilities and services, particularly where this would reduce the community's ability to meet its day-to-day needs;
- ensure that established shops, facilities and services are able to develop and modernise, and are retained for the benefit of the community; and
- ensure an integrated approach to considering the location of housing, economic uses and community facilities and services.

Ensuring the Vitality of Town Centres Planning Practice Guidance

4.12 The Ensuring the Vitality of Town Centres Planning Practice Guidance ('the Town Centres PPG') was published in July 2019 and provides additional direction in respect of how retail and town centre planning policy should be applied in respect of plan-making and decision taking. The Town Centres PPG affirms the Government's aspiration to support town centres in order to generate employment, promote beneficial competition and create attractive, diverse places where people want to live, work and visit.

[16] With the exception (in accordance with paragraph 88 of the NPPF) of small scale rural office proposals and other small scale rural development.

4.13 Paragraph 004 of the Town Centres PPG indicates that a local planning authority's strategy for their town centres should include:

- The realistic role, function and hierarchy of town centres over the plan period. Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years), but will also need to take the lifetime of the plan into account and be regularly reviewed.
- The vision for the future of each town centre, including the most appropriate mix of uses to enhance overall vitality and viability.
- The ability of the town centre to accommodate the scale of assessed need for main town centre uses, and associated need for expansion, consolidation, restructuring or to enable new development or the redevelopment of under-utilised space.
- How existing land can be used more effectively – for example, the scope to group particular uses such as retail, restaurant and leisure activities into hubs or for converting airspace above shops.
- Opportunities for improvements to the accessibility and wider quality of town centre locations, including improvements to transport links in and around town centres, and enhancement of the public realm.
- What complementary strategies are necessary or appropriate to enhance the town centre and help deliver the vision for its future, and how these can be planned and delivered. For example, this may include consideration of how parking charges and enforcement can be made proportionate.
- The role that different stakeholders can play in delivering the vision. If appropriate, it can help establish the level of cross-boundary/strategic working or information sharing required between both public and private sector groups.
- Appropriate policies to address environmental issues facing town centres, including opportunities to conserve and enhance the historic environment.

4.14 This particular piece of work seeks to provide a general Borough-wide retail strategy which will provide an overall context to the determination of planning applications for such uses and will help

inform the Council's consideration of specific strategies and regeneration initiatives. As such, many of the above detailed requirements could be addressed by future centre-specific commissions.

4.15 Paragraph 006 of the Town Centres PPG identifies a series of key indicators of relevance in assessing the health of a centre over time[17]. The indicators allow the role, performance and function of centres to be monitored and are considered in greater detail at Section 6 of this report (which specifically addresses the vitality and viability of Bristol City Centre).

Use Classes Order

4.16 Significant changes to the Use Classes Order have been enacted through the Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020, which came into force on 1 September 2020.

4.17 The amendments include the revocation of Parts A and D, and the introduction of three new Use Classes, these being Classes E, F1 and F2. The Government's objective is that the changes will support the revival of the high street and allow for greater flexibility in changing uses within town centres without the need for planning permission.

4.18 In addition to the three new Use Classes, the changes also result in some changes in respect of uses classified as sui generis. In practical terms, the changes comprise:

- **Use Class E** – Commercial, business and service uses include: shops or retail; cafes or restaurants; financial services; professional services; any service appropriate to provide in a commercial, business or service locality; indoor sports, recreation or fitness; medical or health services; creche, day nursery or day centre; and, offices.
- **Use Class F1** – Learning and non-residential institutions include any non-residential use for the: provision of education; display of works of art; museum; public library or public reading room; public hall or exhibition hall; for or in connection with public worship or religious instruction; or, as a law court.
- **Use Class F2** – Local community uses include: a shop selling mostly essential goods, including food, no larger than 280 sq.m and where there is no other such facility within 1,000 metres radius of the shop's location. A hall or meeting place for the local community, an area or place for outdoor sport or recreation and an indoor or outdoor swimming pool or skating rink.

[17] These indicators inform the healthcheck assessments that are set out at Section 6 of this report.

- **Sui Generis** – Use within this Class now includes Public house, wine bar or drinking establishment; a drinking establishment with expanded food provision; as a hot food takeaway for the sale of hot food where consumption of that food is mostly undertaken off the premises; live music venue; cinema; concert hall; bingo hall; or, dance hall.

4.19 The introduction of Class E is significant and places a wide range of uses including retail, food, financial services, gyms, healthcare, nurseries, offices and light industry into a single use class.

4.20 As ever, the Use Classes are not linked to any spatial considerations. As such, the expanded Use Class E applies equally to both town centres and out of centre locations, and there may be unintended consequences in providing additional flexibility across Class E outside of town centres. Accordingly, it may be necessary for the Council to apply restrictive conditions to certain forms of development in order to restrict the authorised use to that which has been justified in the application submission. This will help ensure that unacceptable impacts do not arise from future Class E development.

4.21 A broad range of national permitted development rights support changes of use in town centres. These rights are set out in the Town and Country Planning (General Permitted Development) (England) Order 2015, as amended. Many of the permitted development rights apply without any application process. Other require prior approval, including the change of use:

- from shops, financial and professional services, a betting shop, pay day loan shop, launderette, and hot food takeaway premises to residential use;
- from amusement arcades / centres or casinos to residential use; and
- from offices to residential use.

4.22 In addition to the above, Government introduced a new right in March 2021 to allow for the change of use from Commercial, Business and Service use (Use Class E) to residential use (Use Class C3) to create new homes. This right is subject to maximum size requirements, the property having been in Class E use for two years and vacant for three months. In addition to this, 'prior approval' for the change of use must be sought from the planning authority. Restrictions on this right apply in conservation areas and for nurseries, as well as in areas that are covered by an Article 4 direction. This is a significant amendment, which will allow a wide range of uses to benefit from permitted development rights to residential use for the first time.

Local Planning Policy Context

4.23 The statutory development plan for Bristol is the Core Strategy, which was adopted in June 2011, and the Site Allocations and Development Management Local Plan (SADMLP), which was adopted in July 2014. In addition to this the Bristol Central Area Plan, adopted in March 2015 provides policies specific to development in the centre of Bristol.

4.24 Core Strategy Policy BCS2 states that Bristol City Centre's role as a regional focus will be promoted and strengthened. Development will include mixed uses for offices, residential, retail, leisure, tourism, entertainment and arts and cultural facilities.

4.25 Core Strategy Policy BCS7 sets out the retail hierarchy of retail centres in Bristol, these are as follows:

- Bristol City Centre will be an area where retail shops uses will predominate in the designated primary shopping areas, supported by a wider range of appropriate uses in the other parts of the centre.
- The 11 town centres will have a similar function to the City Centre.
- The nine district centres will meet the day-today shopping needs of their catchments.
- The 27 local centres will have a similar function to district centres.

4.26 Core Strategy Policy BCS7 establishes that retail development, leisure and entertainment uses and tourism uses will be primarily located within or, where appropriate, adjoining these defined centres. In addition to these uses, town, district and local centres will be the focus for community facilities, higher density forms of residential development and smaller scale offices. Development should be of a scale appropriate to the position of the centre in the hierarchy. Where developments of a significantly larger scale are proposed it should be clearly demonstrated that the catchment the development will serve is in keeping with the role of the centre. Uses which contribute to the maintenance of vitality, viability and diversity of centres will be encouraged. Developments in all centres should include provision for a mix of units including opportunities for small shops and independent traders.

4.27 SADMLP Policy DM7 relates to town centre uses and states that retail and other main town centre uses should be located within defined centres and states that:

4.28 SADMLP Policy DM8 relates to primary shopping areas and secondary shopping frontages and states that within such areas, development will be expected to maintain or provide active ground floor uses.

4.29 SADMLP Policy DM9 focuses on local centres and states that within such centres, development will be expected to generate footfall, maintain an appropriate balance of uses and maintain or enhance the function of the centre and its ability to meet day-to-day shopping needs.

4.30 SADMLP Policy DM10 relates to food and drink uses and the evening economy. Development of food and drink uses will be acceptable provided that they would not harm the character of the area, residential amenity and/or public safety, either individually or cumulatively. Proposals which would result in a harmful concentration of food and drink uses will not be permitted.

4.31 SADMLP Policy DM11 relates to markets, stating that proposals for new street or open markets will be encouraged where they would be beneficial to local shopping provision and would support the vitality, viability and diversity of existing centres. Proposals involving the loss of existing market sites will not be permitted unless it can be demonstrated that there would be no harm to the range, choice and diversity of market sites in the locality or city.

4.32 Section 5 of the Bristol Central Area Plan relates to Shopping, Services and the Evening Economy. It provides a number of policies relating to the strategy for retail development in the City Centre, the location of larger retail development and small-scale retail developments, consideration of primary and secondary shopping frontages, alongside policies relating to new market provision and leisure use frontages.

Emerging Development Plan

4.33 The Council consulted on a draft of the Bristol Local Plan Review between March to May 2019 and the publication version of the new plan was agreed by Full Council on 31 October 2023. The purpose of the plan is to set out how Bristol will develop over the next 20 years, and plan for the delivery of new homes and jobs whilst safeguarding the city's environmental assets.

4.34 Draft Policy DS1: Bristol City Centre states that its role as a regional focus at the centre of a global city will be promoted and strengthened. Development will include mixed uses for offices, residential, retail, leisure, tourism, entertainment and arts and cultural facilities. Facilities and services, including those of a small scale, which contribute to the diversity and vitality of the city centre which will be encouraged and retained.

The Bristol City Centre DDP

4.35 The draft City Centre Development and Delivery Plan has now been published for consultation, which builds on the Bristol One City Plan and the Bristol City Centre Framework. The Plan will guide on the

recovery, regeneration and transformation of the city centre, setting out a vision and high-level principles to guide regeneration. These focus particularly on the Broadmead and Castle Park areas, helping to transform them into more inclusive, sustainable and connected places, and create a green, safe and vibrant city centre. Overall the Plan will help ensure future investment, development and regeneration is co-ordinated.

4.36 The Plan is a set of written documents and plans that will be used to inform and co-ordinate development and regeneration proposals across the area. Following consultation, the Plan will be reviewed, amended and submitted to the council's Cabinet. If endorsed by the Cabinet, it will become a 'material consideration' which means that the council will have to take account of what is set out in the Plan when making decisions on planning applications. It will also be used by the council to guide land and investment decisions.

5 In-Street Surveys

5.1 The purpose of this section is to provide a summary of the extensive market research undertaken in order to support the findings of the City Centre Study. The findings and analysis of the market research set out below, will help formulate the recommendations in respect of the future strategy for the city centre.

5.2 We begin by summarising the findings from the in-street survey, followed by the stakeholder survey and then we look further into the output from the business and market operator surveys.

In-Street Survey

5.3 In-street surveys were undertaken in Bristol City Centre by NEMS in July 2021, in order to understand how the city centre is used and identify those aspects of the centre that may benefit from improvement and change.

5.4 In total, 208 surveys were undertaken in the city centre. The surveys were undertaken at different times of the day and on different days of the week, to try to ensure interactions with a variety of users. Within the centres, the surveys were undertaken at various locations to ensure that the results picked up a range of responses and that they were reflective of a broad array of visitors to the centre.

5.5 The full-tabulated in-street survey results are provided at Appendix 4. We set out an overview of the key findings of the survey below, focusing on customer satisfaction ratings, customer behaviour and suggestions for improvement.

Results

Purpose of Visit

5.6 Respondents were asked to identify the principal purpose of their visit to Bristol City Centre. Whilst Bristol City Centre clearly has a varied offer, the principal driver of trips as identified in Table 5.1, was to visit city centre shops, which was cited by 51.0% of respondents. The next most popular reason to visit was for work, which was identified by 11.1% of respondents. As such, the reason the majority of people go into the city centre is for commercial retail reasons, as opposed to for food shopping trips. Indeed, the proportion stating 'city centre shops' is considerably higher than any other purpose identified, indicating the continued strength and draw of the retail offer in the city centre.

Table 5.1: Main purpose of visit to city centre

Question	1st	2nd	3rd	4th
What is the main purpose of your visit to Bristol City Centre today?	Visiting city centre shops (51.0%)	Work (work here or attending meeting) (11.1%)	Visiting health or medical facilities (10.6%)	Visiting bank or other services (hairdresser, post office, solicitor) AND visiting pub / café / restaurant (both 8.2%)

Source: Question 1 of the 2021 In-Street Survey

5.7 It is clear from Table 5.2 that people have particular destinations in mind when visiting the city centre and that they do not typically link their trips with other purposes in the city centre, as just under half of the survey group (47.6%) stated that there was no other reason to visit the city centre aside from carrying out their intended task. The second most popular answer is to visit a pub/café or restaurant, indicating that approximately a quarter of respondents visit the city centre to also undertake a leisure activity.

Table 5.2: Secondary purpose of visit to city centre

Question	1st	2nd	3rd	4th
What else, if anything, will you be doing in Bristol City Centre today?	Nothing else (47.6%)	Visiting pub / café / restaurant (24.5%)	Visiting city centre shops (18.3%)	Visiting bank or other services (hairdresser, post office, solicitor) (4.8%)

Source: Question 2 of the 2021 In-Street Survey

Shopping Intentions

5.8 In terms of food shopping, it is clear from Table 5.3 that people frequent a variety of different food retailers when visiting the city centre.

5.9 Of the 52.4% of respondents who answered 'yes' to Question 3[18], the most popular food shop within the city centre is Marks and Spencer, on Broadmead, with 13.8%[19] of the survey group undertaking their food shop here. This is followed by the Tesco Express at Broadmead.

[18] Question 3- Are you planning on doing any food shopping this week?

[19] Marks and Spencer was trading at the time of the survey

Table 5.3: Where respondents undertake food shopping

Question	1st	2nd	3rd	4th
Where will you undertake your food shop?	Marks & Spencer, Merchant Street, Broadmead, Bristol (13.8%)	Tesco Express, Broadmead, Bristol (11.0%)	Asda, East Street, Bedminster, Bristol (5.5%)	Sainsbury's, Winterstoke Road, Bristol OR Sainsbury's, Clifton Down Shopping Centre, Whiteladies Road, Clifton, Bristol OR Sainsbury's Local, Broadmead, Bristol (all 4.6%)

Source: Question 4 of the 2021 In-Street Survey

5.10 In terms of non-food shopping, approximately half of respondents answered 'yes' to Question 5, indicating that they were planning to undertake non-food shopping that week. Of those respondents, the most popular destination is Broadmead which was provided by 46.2% of the survey group.

5.11 Cabot Circus is the second most frequented location for non-food shopping, with Bristol City Centre coming in as the third most frequented location, as mentioned by 25.0% of the survey group. This indicates the importance of Broadmead and Cabot Circus in drawing shoppers into the city centre.

Table 5.4: Where respondents undertake (non-food) shopping

Question	1st	2nd	3rd	4th
Where will you undertake your non-food shop?	Broadmead (46.2%)	Cabot Circus, Bristol (36.5%)	Bristol City Centre (25.0%)	Marks & Spencer, Merchant Street, Broadmead, Bristol (4.8%)

Source: Question 5 of the 2021 In-Street Survey

Duration and Frequency of Trips

5.12 Table 5.5 shows that the largest portion of people within the survey group spend between 2-4 hours in the city centre when visiting. However, it is clear from the survey data that people do not typically spend extended periods of time within the city centre, with 18.3% of people staying between 4-6 hours and 6.3% of people spending over 6 hours in the centre.

Table 5.5: Duration of Visit to City centre

Question	1st	2nd	3rd	4th
How long do you intend to spend in Bristol City Centre today?	Between 2-4 hours (39.9%)	Between 1-2 hours (26.0%)	Between 4-6 hours (18.3%)	Less than 1 hour (9.1%)

Source: Question 7 of the 2021 In-Street Survey

5.13 According to 52.1% of the survey group, 'nothing in particular' will encourage people to stay in the centre for an extended period of time. This suggests that people are able to source the products / services they require from places other than the city centre and that there is not the overarching desire to spend longer periods of time in the city centre.

Table 5.6: What encourages respondents to stay in the centre longer than two hours

Question	1st	2nd	3rd	4th
What would encourage you to stay in Bristol City Centre for longer than 2 hours?	Nothing in particular (52.1%)	Different or better shops or markets (9.6%)	Don't know (8.2%)	More entertainment / events (5.5%)

Source: Question 8 of the 2021 In-Street Survey

5.14 Table 5.7 shows that the largest portion of the survey group are not regularly visiting the city centre despite the removal of Covid-19 restrictions, with 16% of people stating that they would only visit the city centre on a monthly basis. This perhaps highlights that the effects of Covid-19 on levels of activity within city centres, has persisted post-restrictions being lifted and reinforces the fact that people no longer need to frequent the city centre to gain access to the goods / services they want or require. This is explored further in Table 5.7, which shows that approximately 28% of people are frequenting the city centre either a little or a lot less, in comparison to two years ago.

Table 5.7: Frequency of Trips to the City centre

Question	1st	2nd	3rd	4th
When not under Covid restrictions, how often do you visit Bristol City Centre?	Less often / not regularly (34.1%)	More than once a week (27.4%)	Monthly (16.4%)	Once every 2-3 weeks (11.1%)
Compared to two years ago, would you say you are visiting Bristol City Centre more or less now?	About the same (56.7%)	A little less (15.8%)	A lot less (12.3%)	A lot more (9.4%)

Source: Questions 9a and 9b of the 2021 In-Street Survey

5.15 Table 5.8 shows that there is nothing in particular that will encourage people to visit and spend more time in Bristol City Centre, highlighting that the offering of the city centre is either not appealing to

a majority of respondents, or is there nothing that a majority of respondents could identify to improve the centre to make it more appealing as a destination.

Table 5.8: What would encourage people to visit Bristol City Centre more often?

Question	1st	2nd	3rd	4th
What would encourage you to visit Bristol City Centre more frequently?	Nothing in particular (47.4%)	Different or better shops or markets (13.5%)	Don't know (12.8%)	Good / cheap parking (5.3%)

Source: Question 10 of the 2021 In-Street Survey

Means of Travel and Car Parking

5.16 Though the survey results in Table 5.9 show that the main mode of transport to the city centre is by bus / metro (33.7% of respondents), 38.0% of respondents answered that they had arrived by car as either a driver or passenger. A further 19.7% travel on foot, indicating the relatively good walk-in catchment and localised residents who choose the city centre to meet their retail, service and leisure needs in particular.

Table 5.9: How respondents travel to the city centre today in comparison to two years ago

Question	1st	2nd	3rd	4th
How did you travel here today?	Bus / metro (33.7%)	Car / van (as driver) (26.9%)	Walk (19.7%)	Car / van (as passenger) (11.1%)
Thinking back to around two years ago, how did you usually travel to Bristol City Centre?	Bus / metro (28.6%)	Car / van (as driver) (24.6%)	Walk (22.7%)	Car / van (as passenger) (10.4%)

Source: Questions 11a and 11b of the 2021 In-Street Survey

5.17 The location of where respondents are most likely to park their cars in the city centre is explored in Table 5.10. This shows that people are most likely to park in areas that are immediately adjacent to the key retailing destinations, such as Cabot Circus and The Galleries, and the attraction of conveniently located parking.

Table 5.10: Parking locations

Question	1st	2nd	3rd	4th
Where did you park today?	Cabot Circus, Bristol (34.2%)	The Galleries, car park (16.5%)	Don't know / can't remember the name (11.4%)	On Street Parking (8.9%)

Source: Question 12 of the 2021 In-Street Survey

Overall impressions of the City centre

5.18 Table 5.11 explores what respondents like and dislike about the city centre at present. The survey results show that although the most desirable asset of the city centre is the range of shops / markets, this is also an aspect of the city centre that could do with improving as mentioned by 6.3% of survey respondents. A total of 37.0% of the respondents stated that there is nothing that they currently dislike about the city centre, comparatively with 15.0% of respondents who stated that there was nothing that they liked about the city centre.

Table 5.11: What respondents currently like and dislike about Bristol City Centre

Question	1st	2nd	3rd	4th
What do you currently like about Bristol City Centre?	Range of shops / markets (41.4%)	Nothing (15.4%)	Range or quality of places to eat (13.5%)	Quality of shops / markets AND how easy it is to walk / cycle around (both 12.5%)
What do you currently dislike about Bristol City Centre?	Nothing (38.0%)	Cleanliness of the city centre (11.5%)	Beggars / homeless / drug addicts (10.1%)	Congestion (9.1%)

Source: Questions 13 and 14 of the 2021 In-Street Survey

5.19 Table 5.12 shows that a total of 25% of respondents stated that there is 'nothing in particular' that would improve the respondents' perception / experience of the city centre. However, it is also clear from the survey results that respondents value the quality of the shops and markets in the city centre and the cleanliness of the public realm, and that these could be improved to create a nicer city centre environment.

Table 5.12: How Bristol City Centre could be improved

Question	1st	2nd	3rd	4th
How do you think Bristol City Centre should be improved?	Nothing in particular (25.5%)	Different or better shops or markets (18.8%)	Don't know (17.3%)	Improved quality or cleanliness of public spaces (11.5%)

Source: Question 16 of the 2021 In-Street Survey

5.20 Table 5.13 highlights that entertainment for children and better cinemas and theatres are the leisure facilities that are sought after the most within the city centre. This is followed by more or better sports facilities.

Table 5.13: How leisure facilities could be improved

Question	1st	2nd	3rd	4th
What kind of changes would you like to see to leisure facilities?	More or better entertainment for children AND more or better cinemas or theatres (both 50.0%)	More or better sports facilities (16.7%)	-	-

Source: Question 17 of the 2021 In-Street Survey

5.21 Table 5.14 explores the respondents' views on what separates Bristol from other cities. As seen in the table, the majority of respondents stated that Bristol City Centre does not do anything better than other cities, with almost 20% of respondents stating that they didn't know what made it better. This suggests that the city centre does not have a clear identity.

Table 5.14: What Bristol City Centre does better than other cities

Question	1st	2nd	3rd	4th
What one thing does Bristol City Centre do better than other places that you visit?	Nothing (26.9%)	Don't know (19.7%)	Shopping (13.0%)	Food / drink AND entertainment facilities AND architecture / environment (all 6.7%)

Source: Question 26 of the 2021 In-Street Survey

5.22 Other popular shopping destinations outlined by the survey respondents were Cribbs Causeway, with 28.4% of respondents referring to this destination, and Bath city centre, which was mentioned by 14.9% of the respondents. This might suggest that the offering within Bristol City Centre itself is not providing the respondents with all of the resources required or desired or that the alternative destinations have a qualitatively different offer to that provided for in the city centre.

Table 5.15: Other popular shopping centres, retail parks or town / city centres regularly frequented

Question	1st	2nd	3rd	4th
Which other shopping centres, retail parks or town / city centres do you use regularly, i.e. at least once a month? This excludes free standing supermarkets?	None (38.9%)	Cribbs Causeway, Bristol (28.4%)	Bath City centre (14.9%)	Clarks Village (9.1%)

Source: Question 30 of the 2021 In-Street Survey

6 Stakeholder Engagement

Stakeholder Survey

Introduction

6.1 In September 2020, a Stakeholder Survey was prepared on Survey Monkey and distributed through online channels (principally the Council's social media channels, website and via distribution lists) to seek important stakeholders' views, concerns and aspirations on key elements of the city centre. Stakeholders included local, regional and national agents, key landowners, representatives of businesses and other key organisations involved in the running of the city centre

6.2 The survey focused on the policy and physical interventions within the city centre. A presentation was also given to the stakeholders online to provide some background to the Study and to explain how their views would feed into the findings and recommendations.

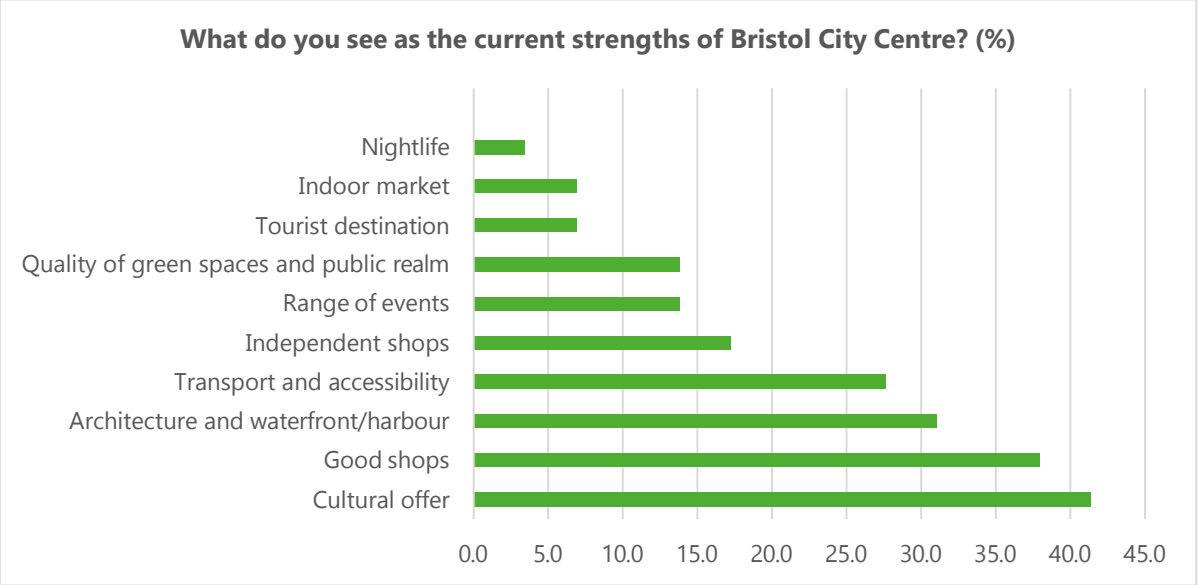
Feedback

6.3 Figure 6.1 explores the respondents' views on what the current strengths of the city centre are. Respondents were able to choose more than one strength.

6.4 As such, the most common strength mentioned were the options for food and drink (at 44.8% of all respondents), with the cultural offer (41.4% of respondents) and good shops (37.9% of respondents) also receiving a large proportion of the responses.

6.5 In terms of those elements at the other end of the scale, respondents stated that the tourism offer and indoor market (both 6.9% of respondents) were less of a current strength of the city centre, alongside the nightlife (3.4% of respondents).

Figure 6.1: The current strengths of Bristol City Centre that generate the most footfall and repeat visits



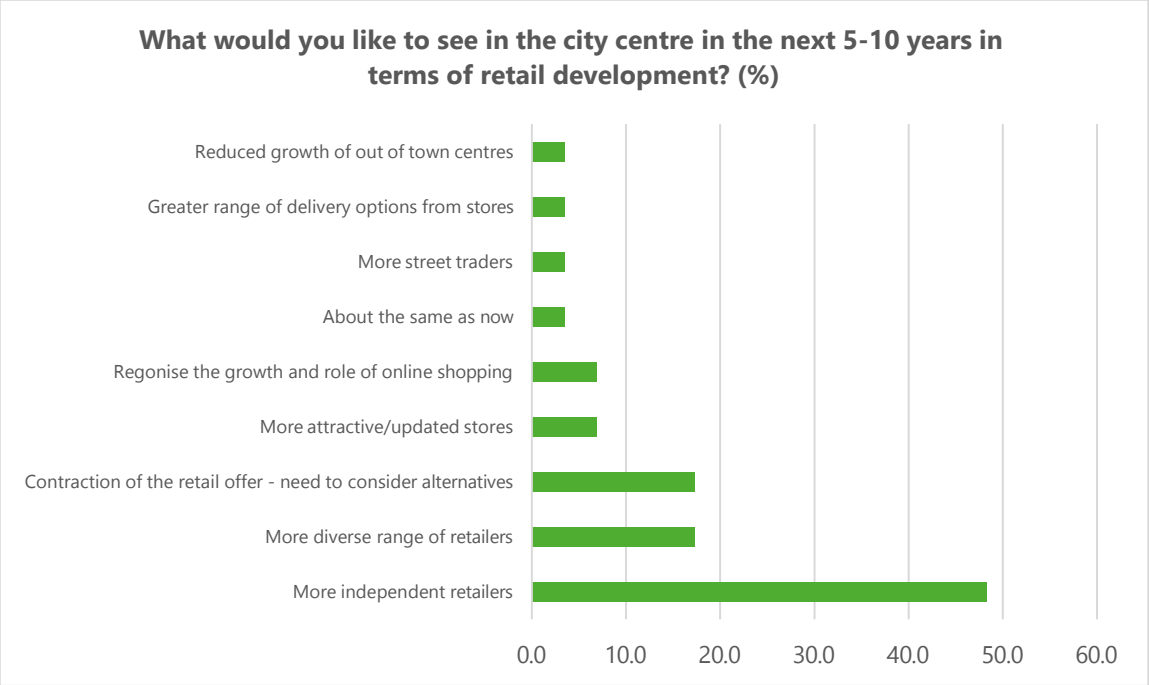
Source: Question 1 of the 2021 Stakeholder Survey

6.6 Figure 6.2 explores the respondents' views on what retail development they would like to see take place within the city centre over the next 5-10 years.

6.7 The biggest proportion of respondents – 48.3% of responses – outlined that they wish to have more independent retailers within the city centre.

6.8 Only 3.4% of respondents stated that they wished for the reduced growth of out of town centres, highlighting that the majority of people would prefer to shop within the city centre, concentrating investment within the city centre.

Figure 6.2: What respondents would like to see in terms of retail development within the city centre over the next 5-10 years



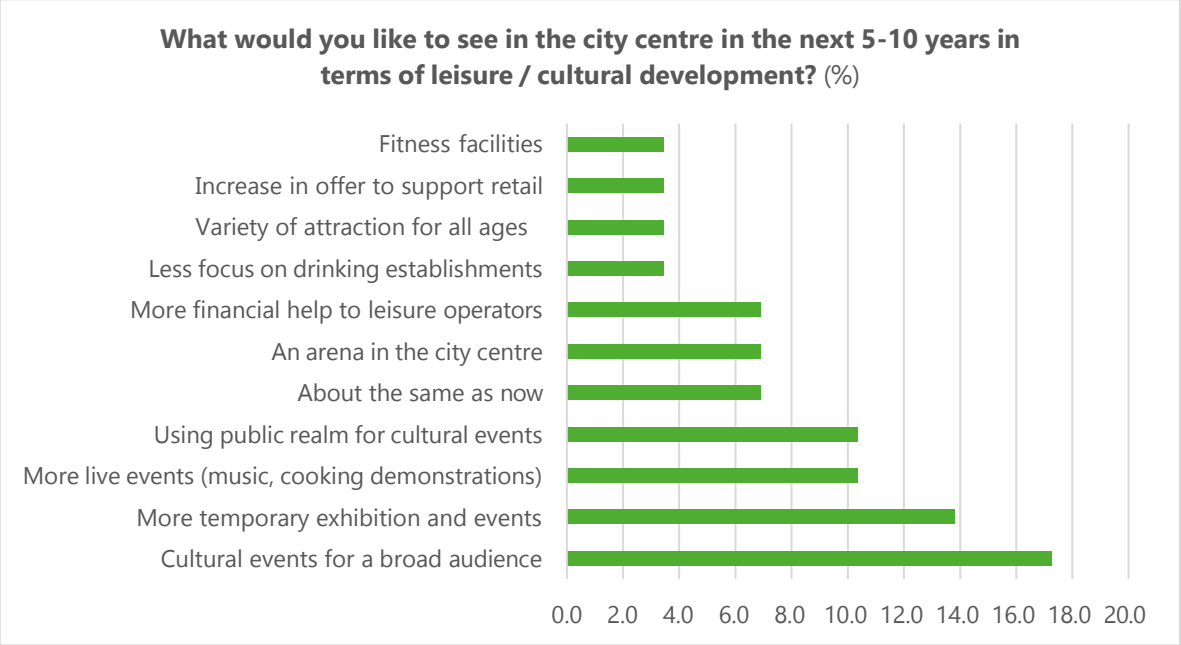
Source: Question 2a of the 2021 Stakeholder Survey

6.9 Figure 6.3 explores what respondents would most like to see in terms of the development of leisure and cultural infrastructure within the city centre over the course of the next decade.

6.10 The responses show that the most important cultural / leisure development for respondents are cultural events for broad audiences (17.2% of respondents), more temporary exhibition and events spaces (13.8% of respondents) and more live events and greater use of public realm for cultural events (both at 10.3% of respondents).

6.11 A total of 6.9% of all respondents answered by saying 'about the same as now', highlighting that the current leisure / cultural offer of the city centre is sufficient for some stakeholders.

Figure 6.3: What respondents would like to see in terms of leisure / cultural development within the city centre over the next 5-10 years

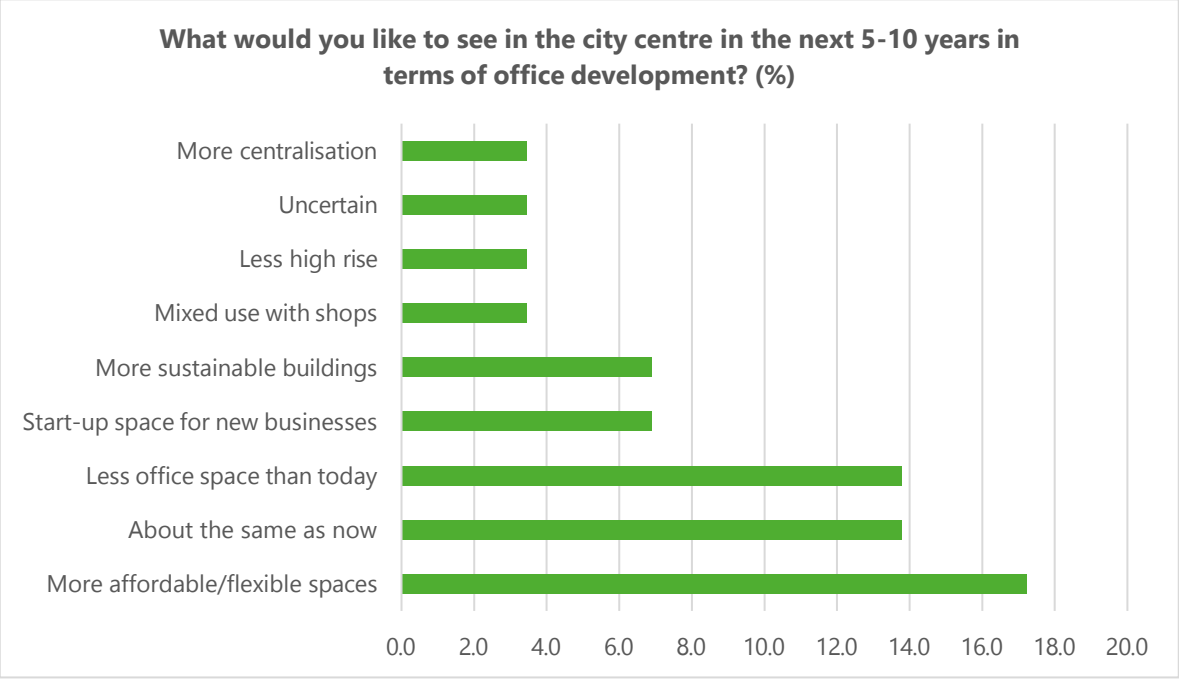


Source: Question 2b of the 2021 Stakeholder Survey

6.12 Figure 6.4 explores what people would like to see in terms of office development over the next decade. The largest amount of responses (17.2% of the total) received were for more affordable / flexible spaces. This suggests that the current office offering is not accessible for everyone and does not currently meet the demand within the city centre.

6.13 The second most common response was for less office space than there is today or about the same as now (both at 13.8% of respondents). This suggests that there is less of a need for office space within city centres, perhaps as a result of the change in work patterns post-pandemic.

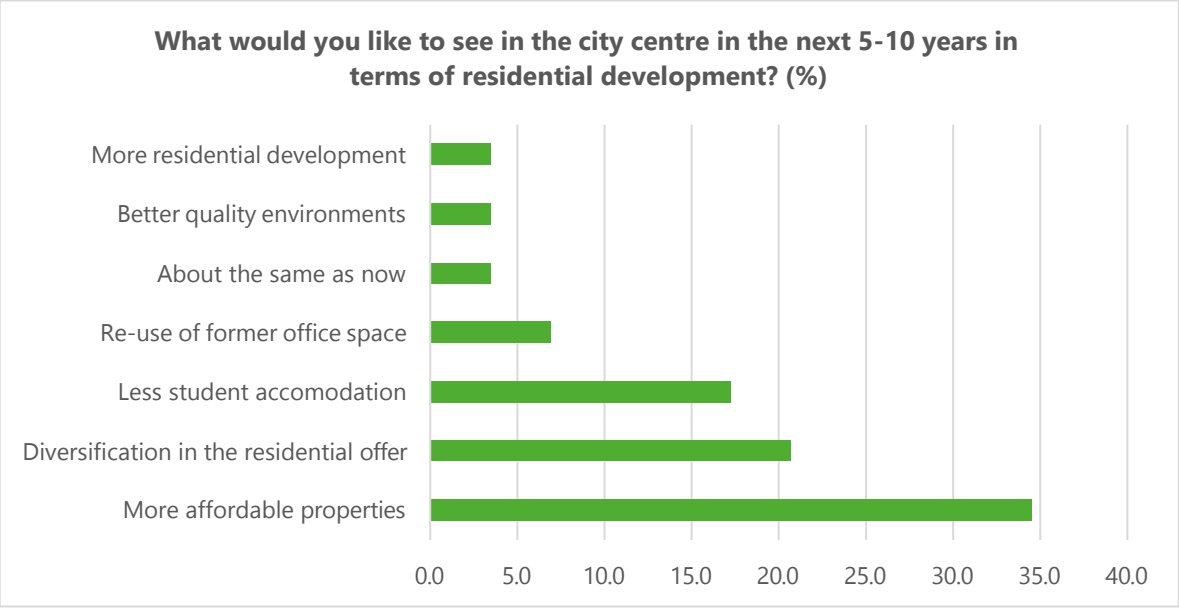
Figure 6.4: What respondents would like to see in terms of office development within the city centre over the next 5-10 years



Source: Question 2c of the 2021 Stakeholder Survey

6.14 Figure 6.5 explores what respondents would most like to see in terms of residential development within the city centre over the next 5-10 years. The most common response stated that people would like to see more affordable properties within the city centre (34.5% of respondents).

Figure 6.5: What respondents would like to see in terms of residential development within the city centre over the next 5-10 years



Source: Question 2d of the 2021 Stakeholder Survey

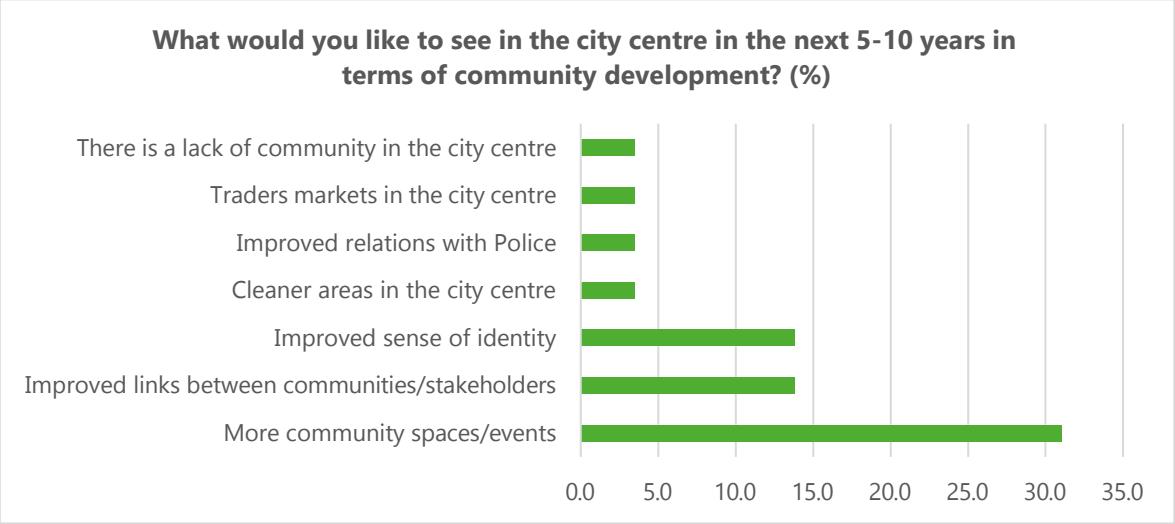
6.15 Figure 6.6 explores what people would most like to see developed to improve movement and accessibility within the city centre. The most common response received referred to the pedestrianising of the city centre and better public transport options (both at 27.6% of respondents).

Figure 5.6: What respondents would like to see in terms of development relating to movement and accessibility within the city centre over the next 5-10 years

Source: Question 2e of the 2021 Stakeholder Survey

6.16 Figure 6.7 identifies what respondents would most like to see improved in regard to community developments over the course of the next decade. The majority of responses received referred to the development of more community spaces and events (31.0% of respondents).

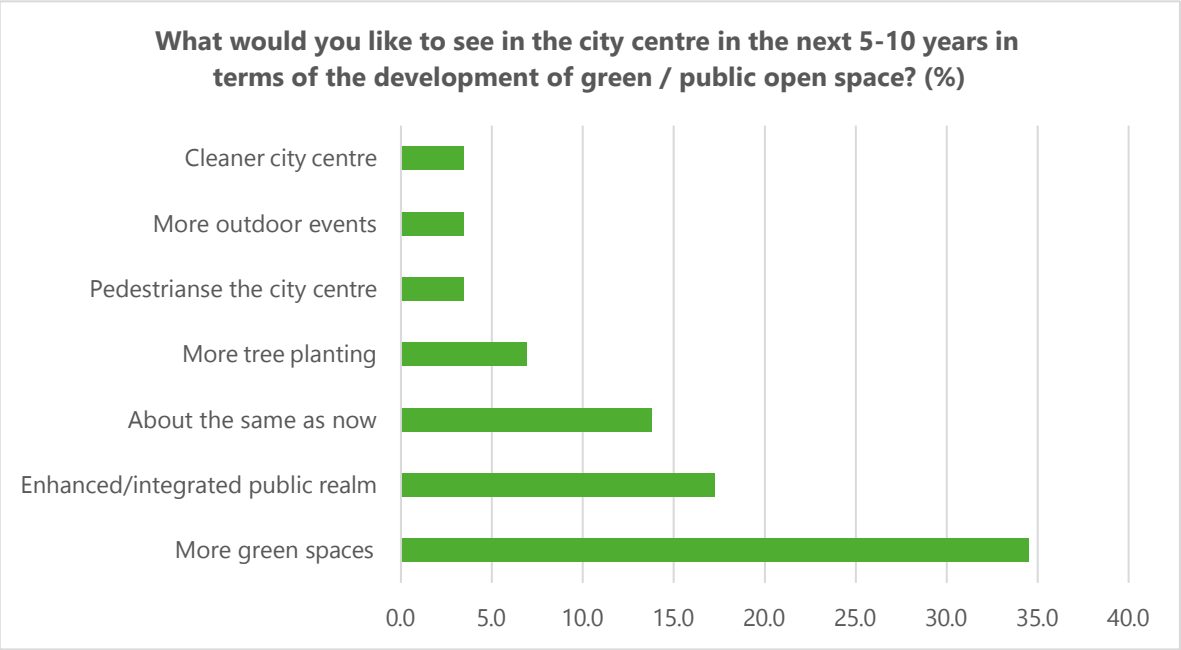
Figure 6.7: What respondents would like to see in terms of community development within the city centre over the next 5-10 years



Source: Question 2g of the 2021 Stakeholder Survey

6.17 Figure 6.8 highlights the views of the respondents in regard to the development of the public realm in Bristol City Centre over the next 5-10 years. The most common response, at 34.5% of all respondents, was more green spaces.

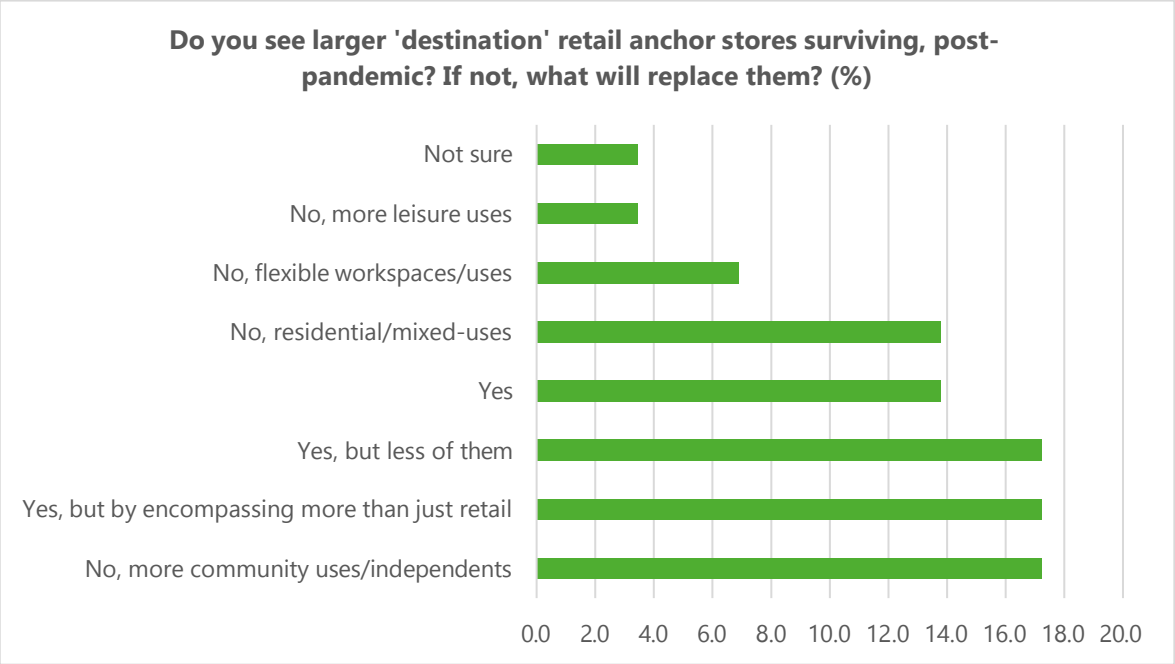
Figure 6.8: What respondents would like to see in terms of the development of green / public open space within the city centre over the next 5-10 years



Source: Question 2h of the 2021 Stakeholder Survey

6.18 Figure 6.9 highlights the views of respondents in regard to the longevity of larger 'destination' retail anchor stores, within the post-COVID 19 pandemic economy. The majority of the respondents do believe that the retail anchor stores will survive, just less of them and particularly those with more than solely a retail offering or just that there will be fewer of them in total (both at 17.2% of respondents). A total of 17.2% of respondents stated that they would not survive, and that there would be more community uses and independent operators.

Figure 6.9: What respondents believe will happen to larger 'destination' retail anchor stores, post-COVID 19 pandemic



Source: Question 3 of the 2021 Stakeholder Survey

6.19 Question 4 of the Stakeholder Survey asked people whether they still consider it likely that retail will be the key driver of footfall in the city centre in five-years' time. A total of 37.9% of respondents stated that they believed retail would remain the key driver, compared to 31.0% of respondents dissenting from this. Furthermore, 17.2% of respondents stated that whilst retail would still be key, it would not likely be as important as it had been previously.

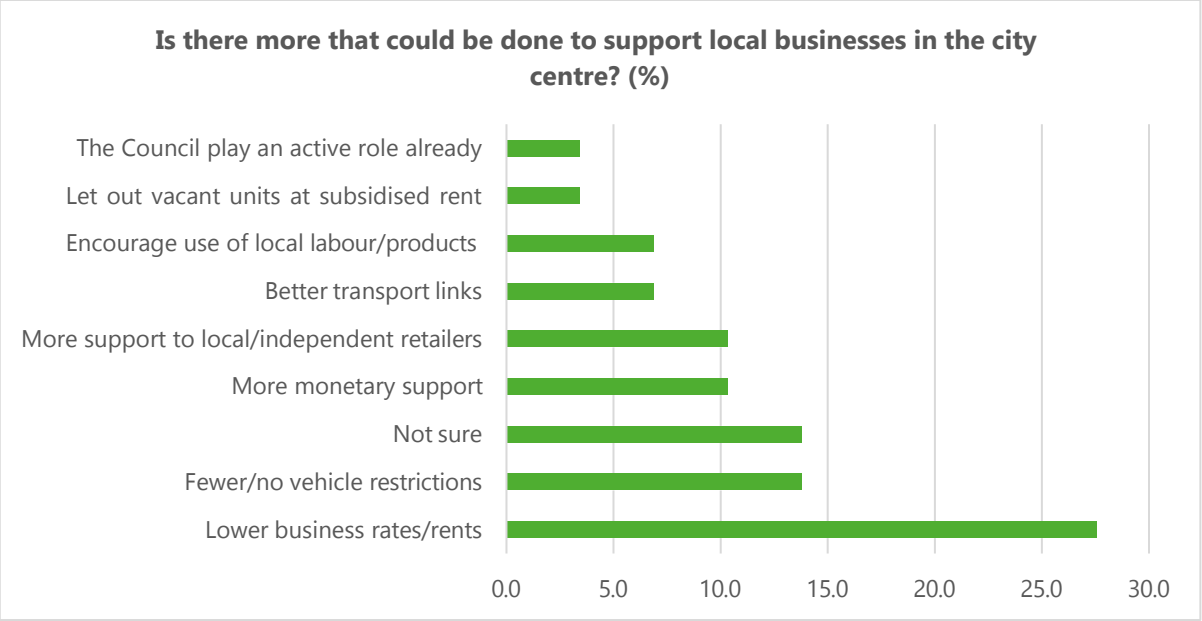
6.20 Figure 6.10 outlines what respondents believe will increase leisure and retail activity in the city centre. The most responses received related to diversifying the leisure offer and the pedestrianisation of the city centre (both at 20.7% of respondents. A further 17.2% of respondents stated improving the transport links. This highlights that the accessibility levels to and from the city centre have a direct influence on the levels of activity within this destination. These responses also show that there is a demand for an improved leisure offer in the city centre.

Figure 6.10: What respondents believe will underpin the retail and leisure activity within the city centre

Source: Question 5 of the 2021 Stakeholder Survey

6.21 Figure 6.11 outlines how respondents believe local businesses that are located in the city centre could be supported more. The most common response received related to lowering the business rates and rents for these businesses (27.6% of all respondents). In contrast, the lowest amount of people stated that the Council play an active role already in helping to support local businesses (3.4% of respondents), suggesting that people would like to see more Council involvement.

Figure 6.11: How respondents believe local businesses located within the city centre could be further supported



Source: Question 6 of the 2021 Stakeholder Survey

Business Survey

Introduction

6.22 Bristol City Council have undertaken a survey of business within the city centre, and a total of 138 responses were received to this survey. The following is analysis undertaken by AspinallVerdi and is provided at Appendix 3. This analysis focuses on questions that relate to the independent sector and what can be done to improve trading for this sector and outdoor trading.

Responses

Question 17

6.23 Table 6.16 summarises AspinallVerdi's analysis of the responses received in relation to question 17. This question asked the respondents to consider how the external environment immediately around their premises could be changed to improve trading.

Table 6.16: How could the external environment immediately around your premises be changed to improve trading?

Question	1st	2nd	3rd	4th
How could the external environment immediately around your premises be changed to improve trading?	Public realm improvements (10%)	Yes/Other (8%)	Highway improvements (7%)	Shop improvements/ Trading/ Car parking (3% each)

Source: Table 6.1 of Appendix 3

6.24 AspinallVerdi's analysis shows that:

- 58% of the participants provided no response
- 8% of the participants provided 'yes' as a response but provided no further comments.
- The remaining 34% of respondents provided a response, the categories can be seen in the table above.
    - 10% of responses related to public realm improvement including pedestrianisation, cleaning the streets and making them more welcoming and inclusive.
    - 7% of responses relate to highway improvements, including implementing traffic restrictions to reduce traffic. Specifically, the removal of segregated cycle lane bollards and temporary street furniture put in place to close parking spaces on St Philips Bridge was also mentioned along with the implementation of 'no cycling / scooter signs on pavements.

- The remaining 17% of responses related to shop improvements, car parking and improving existing services and facilities present within the city.

6.25 Discounting the N/A category, it is clear that there is an appetite for improvements to be made to the public realm and aspects such as car parking.

Question 20

6.26 Table 6.17 provides AspinallVerdi's analysis of the responses received in relation to question 20 of the Business Survey. This question asked the respondents to consider what support is needed to encourage independent businesses to take on city centre / high street premises.

Table 6.17: What support is needed to encourage independent businesses to take on city centre / high street premises?

Question	1st	2nd	3rd	4th
What support is needed to encourage independent businesses to take on city centre / high street premises?	Rents & Rates (14%)	Rents/Other (12%)	Business Rates (11%)	Financial (7%)

Source: Table 6.2 of Appendix 3

6.27 AspinallVerdi's analysis shows that:

- 34% of the participants provided no response.
- The remaining 66% of respondents provided a response, the categories can be seen in the table above.
  - 36% (over 50% of respondents) of these responses related to business rates and rents, all responses stated that these should be lower for the independent businesses.
  - 7% of the responses related to financial support which ranged from incentives, grants and support for legal costs involved in moving into premises.
  - The remaining 23% of responses related to planning, public realm improvements, flexible leases and transport improvements.

6.28 From this analysis it is not clear whether the responders enjoy the benefits of the Small Business Rates Relief scheme and the more recent Business Rates holiday which the Chancellor announced in the October 2022 Budget. For traders with more than one outlet there is a Business Rates implication and therefore this significant cost is a concern to the operators.

Question 21

6.29 Table 6.18 provides AspinallVerdi's analysis of the responses received in relation to Question 21 of the Business Survey. This question asked the respondents to provide their ideas on what could be done to reuse vacant space within the city centre and high streets.

Table 6.18: What could be done to reuse vacant space within the city centre and high streets?

Question	1st	2nd	3rd	4th
What could be done to reuse vacant space within the city centre and high streets?	Rent (12%)	Housing (11%)	Leisure/ Culture (8%)	Pop-up space (7%)

Source: Table 6.3 of Appendix 3

6.30 AspinallVerdi's analysis shows that

- 44% of the participants provided no response.
- The remaining 56% of respondents provided a response, the categories can be seen in the table above.
    - 12% of the respondents stated that lower rents for vacant buildings could be an incentive for pop ups and independent business.
    - 11% of the respondents stated that vacant buildings could be turned into residential accommodation including social housing or for the homeless. One respondent suggested that vacant space could be converted into a hotel for the homeless.
    - The remaining 33% of responses related to converting vacant space for Arts, Leisure, Culture, workspace and public realm.

6.31 The respondents to the survey show clear support for bringing activity back into vacant accommodation. Interestingly the preference is for non-residential uses such as for arts, leisure and culture and this may reflect the nature of the locations as well as the expectation that such uses would be footfall drivers in a way that residential would not achieve.

Question 22

6.32 Table 6.19 provides AspinallVerdi's analysis of the responses received in relation to Question 22 of the Business Survey. This question asked respondents to consider what more could be done to facilitate outdoor trading.

Table 6.19: What more could be done to facilitate outdoor trading?

Question	1st	2nd	3rd	4th
What more could be done to facilitate outdoor trading?	Public realm (9%)	Covered Areas (8%)	Financial support/ Licencing (4%)	Transport/ Other (3%)

Source: Table 6.4 of Appendix 3

6.33 AspinallVerdi's analysis shows that

- 66% of the participants provided no response.
- The remaining 34% of respondents provided a response, the categories can be seen in the table above. To summarise:
  - 9% of the respondents stated that public realm improvements including, pedestrianisation, cleaning the streets, better outdoor toilet provision and regular street closures for markets in areas outside of the city centre such as East Street, Bedminster.
  - 8% of the respondents related to covered areas / market for outdoor trading. No specific locations were provided.
  - The remaining 7% relates to transport improvements, making trading licenses easier to obtain and financial support.

6.34 The responses to this question do not provide a definitive picture. Responders appear to have a wide range of views, although public realm and covered areas seem to stand out.

Market Operators Survey

Introduction

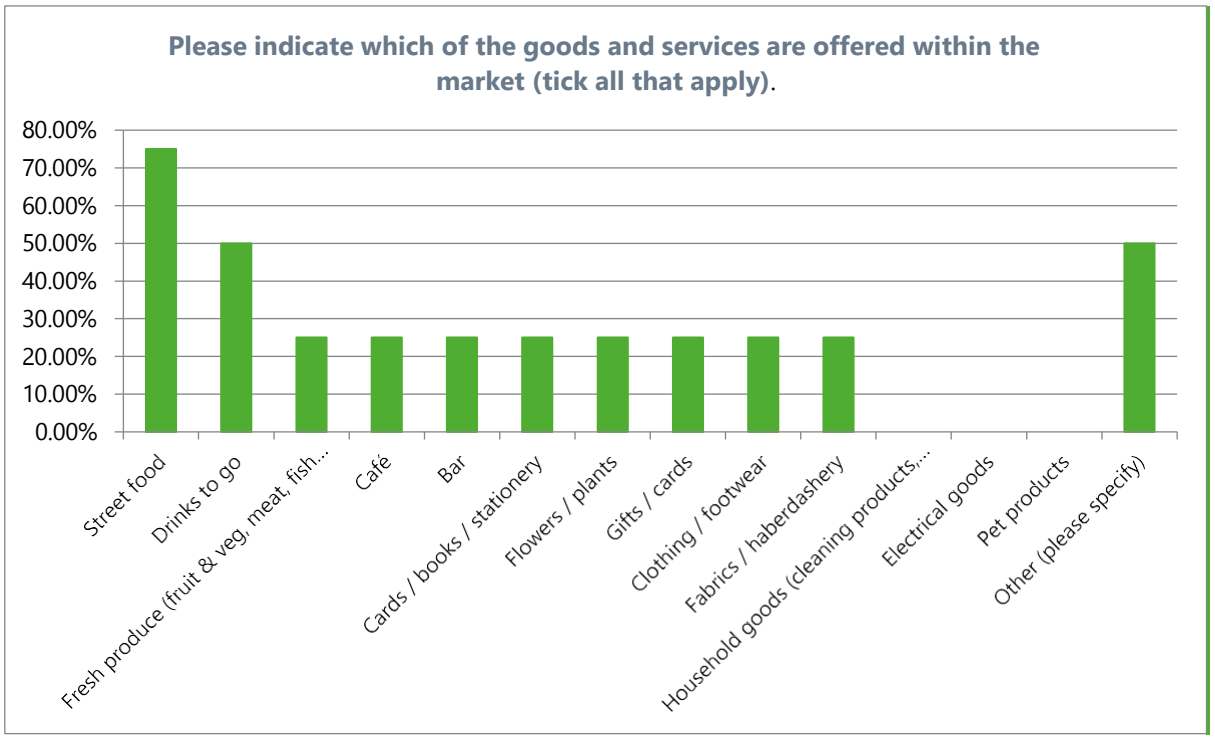
6.35 A survey was distributed to five market operators in the City Centre in order to gauge the current trading characteristics of the markets and to determine how the Covid-19 pandemic has impacted the operation of them. In total, four markets responded to the survey. The results and findings are summarised below.

Findings

6.36 The four markets which responded vary in size from having a maximum of 11 stalls per day to up to 100 operators (60 indoor and 40 outdoor operators).

6.37 Question 3 asked the operators to indicate the goods and services offered within the market. The most common response was street food, with three of the four markets who responded containing such operators. Alongside street food, drinks to go are offered in two of the four markets. It is therefore clear that a strong food and drinks offer is common to many of the markets, alongside a more traditional fresh food and comparison goods offer (clothing, gifts, flowers etc).

Figure 6.12: Please indicate which of the goods and services are offered within the market



Source: Question 3 of the 2021 Market Operators Survey

6.38 Each of the four markets reported that more local residents visit the markets than tourists. In respect of vacancies, two markets have a vacancy rate below 10%, whereas the other two markets reported a vacancy rate of between 26% and 50%. Three of the four markets who responded reported that the proportion of vacant units/stalls has increased following the lockdown associated with the Covid-19 pandemic.

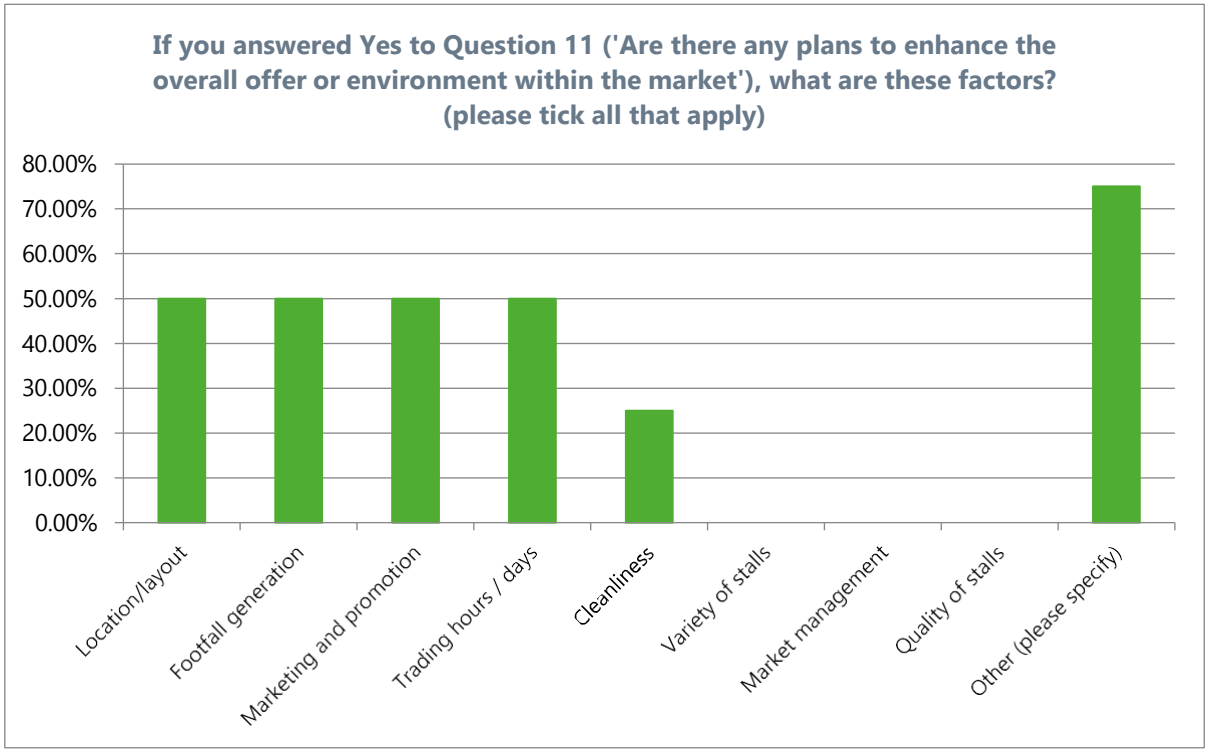
6.39 At Question 7, respondents were asked to describe the general trading characteristics within the market prior to the lockdowns associated with the Covid-19 pandemic. Respondents noted a strong level of footfall, generated by a mix of local residents, office workers, students and tourists. The markets were used for socialising and meeting, alongside a strong range of buyers and low vacancy levels. Furthermore, seasonal trends were noted with a high level of footfall at Christmas noted by

one operator. Respondents noted a significant drop in activity in 2020 due to the lockdown, with levels of activity slowly increasing throughout 2021.

6.40 All four respondents noted that the characteristics of the market prior to the lockdowns have now changed. At Question 9, respondents were asked to elaborate on what these changed characteristics were. Primarily, respondents noted that the levels of activity have dropped significantly as routines and shopping patterns have altered. This drop in activity, alongside limits to capacity, has resulted in some operators struggling to return to operation, and as such the markets have fewer stalls and larger areas for hospitality space, largely areas for food and drink consumption. Key events, including around the Christmas period, have been cancelled or scaled back. However, one operator reported a still strong level of footfall, with a diversified base of traders including those who sell vintage goods/clothing.

6.41 All four respondents stated that there are factors which are currently hindering the successful performance of the market. Question 11 asked respondents to elaborate on these factors, and these responses are shown in Figure 6.13.

Figure 6.13: If you answered Yes to Question 11 ('Are there any plans to enhance the overall offer or overall environment within the market'), what are these factors?



Source: Question 11 of the 2021 Market Operators Survey

6.42 In respect of whether the markets have increased the amount of temporary seating provided, half of respondents reported that they had done so, however only one operator reported that any increase in outdoor seating has been at the expense of traditional market pitches.

6.43 All four respondents reported that there were current plans to enhance the offer or overall environment within the market. Respondents were asked to elaborate on these plans. These changes included renovations to the furniture and signage of markets, an increase in the seating areas and covered units for traders, introducing more food and drink producers to the market, improving the quality and appearance of the individual traders pitches, reviewing layouts and reducing carbon footprint and giving greater consideration to sustainability issues.

6.44 At Question 16, respondents were asked to give their view on where they saw the market being in approximately five years. Views included increased awareness of the market amongst local customers, further investment in the fabric of market buildings and plans to grow market offer at different times of the day and throughout the city centre. However, although the need to ensure cleaner air was recognised, there were concerns around the impacts a Clean Air Zone may have on individual traders.

Summary

6.45 The market research undertaken and summarised above has provided a range of outputs which will assist in the overarching recommendations for the city centre later in this Study. We summarise the key findings from each element below.

In-Street Survey

6.46 The in-street survey, which was conducted within the city centre at various locations and at various times throughout the week, indicates that the principal purpose for visiting the city centre is to visit retail destinations, and for no other purpose. However, the survey also demonstrates that there were a proportion of visitors who when visiting the city centre to shop, were also linking their trips with a visit to the pubs, cafes or restaurants. When visiting for non-food retail purposes, the principal destination visited was Broadmead, followed by Cabot Circus, with a further quarter of the respondents generally stating 'the city centre'. The results therefore clearly indicate that retailing is still the principal purpose for visiting the city centre.

6.47 The highest proportion of visitors travel to the city centre by bus or metro, followed by travelling by car or other private vehicle. The high proportion of visitors travelling by public transport or walking

into the city indicates that the accessibility of the city centre is good, and that there is also a good local walk-in catchment which the city centre operators benefit from.

6.48 In terms of the qualitative questions, and an attempt to understand what visitors liked and disliked about the city centre and what they thought could be done to improve the city centre, the answers were mixed. In terms of the positives of the city centre, respondents stated that they like the range of shops and markets and the range of places to eat. However, when asked what they disliked, issues such as the cleanliness of the city centre and number of beggars or homeless people were listed. The range of shops and cleanliness of the city centre were also picked up by respondents in identifying how the city centre could be improved.

6.49 Importantly, just over a quarter of respondents stated that they also visit Cribbs Causeway frequently, indicating that visitors are visiting both destinations despite the offer within the city centre.

Stakeholder Survey

6.50 Given the importance of understanding the views of the key stakeholders involved in the success (both current and future) of the city centre, we also undertook a stakeholder survey.

6.51 Stakeholders identified that the current principal strengths of the city centre is the food and drink offer, followed by the cultural offer and shopping facilities.

6.52 Importantly, stakeholders were asked what they would like to see in the city centre over the next five to ten years. Key suggestions and aspirations for stakeholders include:

- A higher proportion of independent retailers;
- More cultural events for a broad audience and more temporary exhibition and events;
- More affordable and flexible office space;
- A higher proportion of affordable residential properties within the city centre;
- Better public transport options and pedestrianisation within the city centre;
- A wider offer of community spaces and events; and
- More green spaces and an enhanced public realm.

6.53 In addition to the above, stakeholders also provided their views on what could be done to help further underpin the retail and leisure activity within the city centre. Key improvements identified by the stakeholders include:

- Diversification of the leisure offer;
- Pedestrianisation of the city centre;
- Better transport accessibility;
- More financial support to the sector; and
- An increased residential population in the city centre.

Business Survey

6.54 AspinallVerdi have analysed the responses to the Business Survey which relate to the four questions which considered the independent sector and what could be done to improve trading for this sector and outdoor trading.

6.55 In terms of their analysis, AspinallVerdi have identified a number of overarching themes which are summarised below

- Public realm improvements relating to pedestrianisation, cleaner streets and making the environment more welcoming and inclusive.
- Transport and highways improvements relating to including implementing traffic restrictions to reduce traffic. Comments were also made in relation to street closures as a means of making space for outdoor markets.
- Lower business rates and rents to provide incentives to independent businesses as well as reducing the number of vacant buildings in the city centre.
- Covered areas / market for outdoor trading. No specific locations were provided. Specific responses included;
    - Temporary marquee / gazebos could be set up for traders
    - Introduction of Bristol City Centre farmers markets to encourage lower food miles, education drives about local food.
    - Alfresco covered dining facilities for bars and restaurants.

6.56 In terms of independent trading, Question 20 specifically asked respondents to consider what support is needed to encourage independent business to take on city centre / high street premises. Key themes which emerged from this included; lower business rates and rents for independent

businesses; flexible leases (length) and turnover rents; financial support through incentives, grants (Government Funding?); and, wider public realm and transport improvements.

6.57 Vacant units are clearly an opportunity to improve the retail and wider offer within the town centre. Careful consideration should be given to how this space can be used and what incentives could be offered to businesses looking for space.

Market Survey

6.58 In addition to the above, a separate online survey was also issued to the five market operators within the city centre, to gather views on the trading characteristics and to determine how the markets are performing post Covid.

6.59 It is clear that the markets within the city centre vary in size, nature and overall quality. Of the four market operators and managers who responded, three stated that the most common nature of goods and services on offer was street food, with drinks to go. The food and drink offer of the markets is therefore a principal offer, alongside a wider more traditional convenience and comparison offer often found within markets.

6.60 The respondents were asked to describe the general trading characteristics within the market prior to the lockdowns associated with the Covid-19 pandemic. Respondents noted a strong level of footfall, generated by a mix of local residents, office workers, students and tourists. The markets were used for socialising and meeting, alongside a strong range of buyers and low vacancy levels. Furthermore, seasonal trends were noted with a high level of footfall at Christmas noted by one operator.

6.61 All four respondents reported that there were current plans to enhance the offer or overall environment within the market. These changes include renovations to the furniture and signage of markets, an increase in the seating areas and covered units for traders, introducing more food and drink producers to the market, improving the quality and appearance of the individual traders pitches, reviewing layouts and reducing carbon footprint and giving greater consideration to sustainability issues.

6.62 Respondents were also asked to give their view on where they saw the market being in approximately five years. Views included increased awareness of the market amongst local customers, further investment in the fabric of market buildings and plans to grow market offer at different times of the

day and throughout the city centre. However, although the need to ensure cleaner air was recognised, there were concerns around the impacts a Clean Air Zone may have on individual traders.

7 Comparator City Analysis

Introduction

7.1 AspinallVerdi have undertaken an analysis of four comparator cities, which have been selected based on a broad range of factors including location and size of the city. These four cities are Cardiff, Exeter, Leeds and Southampton. AspinallVerdi's Comparator City Analysis is provided at Appendix 6.

Overview and Key Indicators

7.2 AspinallVerdi's analysis has considered the performance of the four selected centres, plus Bristol. This has included an analysis of the net absorption rate of each centre[20]. This has shown that three out of the five cities (Bristol, Cardiff and Leeds) have experienced a negative net absorption which indicates that more retail space was vacated and placed on the market than was leased. This indicates that demand for retail in these cities has decreased relative to supply. Exeter and Southampton on the other hand have experienced a positive net absorption indicating that demand in these cities has increased over the last 12 months.

7.3 The Vacancy Rate across the five cities is similar with three having the exact same rate at 1.6%. Southampton is slightly higher at 2.4% indicating that over the last year fewer retail units were occupied here when compared to the other four cities. The vacancy rate is discussed further in Sections 2 and 5 of Appendix 6.

7.4 In terms of monthly rent growth, four out of the five cities have seen a decrease with Exeter showing the greatest decrease at 3.8% whilst Leeds has seen monthly rents increase over the last year by 2.2%.

7.5 AspinallVerdi have compared the centres by four key indicators, which include; Net Internal Area of retail space, Vacancy Rates, Market Rent and Availability across three retail sectors; shopping centres, retail parks and general retail.

Net Internal Area

7.6 The City of Leeds submarket area contains more than 20 million sq.ft of retail, around two-thirds is classed as general retail, with around 4 million sq.ft situated within shopping centres and just under 2 million sq.ft situated in retail parks. Bristol has the second highest amount of retail floorspace (circa

[20] The net absorption relates to existing buildings and is a measure of the total sq.ft occupied less the total space vacated over the period of time.

15 million sq.ft) whilst Exeter currently has the lowest amount of retail floorspace at just over 6 million sq.ft.

Vacancy Rates

7.7 Vacancy rates are expressed as a percentage and identifies the amount of vacant space divided by the total existing floorspace. High vacancy rates indicate that properties are not renting well while low vacancy rates can point to a stronger rental market. In respect of the three retail centres:

- For shopping centres, the Vacancy Rate is highest in Exeter at 3.4% whilst Southampton has the lowest Vacancy Rate at 1.10%;
- For retail parks, the Vacancy Rate is highest in Leeds at 6.2% whilst Exeter has the lowest Vacancy Rate at 0.20%; and,
- For general retail, the Vacancy Rate is similar for four out of the five cities, averaging 1.45% whilst Southampton has a higher Vacancy Rate at 2.6%.

Market Rents and Yields

7.8 AspinallVerdi have also undertaken an analysis of market rents across the five cities, and have identified that for both retail parks and general retail, rental values are similar across the five cities:

- Bristol - £20 psf
- Cardiff - £18 psf
- Exeter - £20 to £25 psf
- Leeds - £22 psf
- Southampton - £16 psf

7.9 There is a greater variance in rental values for shopping centres across the five cities, the highest being Southampton at £56 psf and the lowest being for Cardiff at £24 psf.

7.10 For retail parks, AspinallVerdi have identified that between 2009 and 2021, Exeter has generally achieved the highest rent when compared to the other four cities. In four of the cities, rental values reached their peak in 2013/14 whilst in Leeds, rents have been steadily increasing since 2013, reaching a peak in 2020. The forecast does suggest a slight decrease in rental values across the five cities before reaching 2021 rental levels in 2024. Market rents for retail parks across the five cities currently (May 2021) range between £13 psf (Southampton) and £23 psf (Leeds).

7.11 For shopping centres, AspinallVerdi have identified that between 2009 and 2021 Southampton has achieved the highest rent when compared to the other four cities. In four of the cities, rental values decreased in 2021 with the exception of Leeds where rental values in shopping centres rose by 1.5%. The forecast does suggest a levelling off of rental values with slight increases towards 2024 / 25. Market rents for shopping centres across the five cities currently (May 2021) range between £23 psf (Cardiff) and £57 psf (Southampton).

7.12 Finally, for general retail AspinallVerdi have identified that between 2009 and 2021, Exeter has achieved the highest rent when compared to the other four cities. In four of cities, rental values reached their peak in 2012/13 whilst in Leeds, rents have been steadily increasing since 2012, reaching a peak in 2019 before levelling off. The forecast does suggest a decrease in rental values across the four of the cities (except Leeds) before increasing again in 2021. Market rents for shopping centres across the five cities currently (May 2021) range between £16 psf (Southampton) and £24 psf (Exeter).

7.13 In respect of market yields, AspinallVerdi have analysed evidence based on transactions which have occurred each year since 2009 in each of the five cities.

7.14 In terms of retail parks, it can be seen that Yields have fluctuated between 5% and 8% during the time period. Since 2017 /18 Yields for retail parks have generally been softening (rising), which looks set to continue into 2022 in part due to economic uncertainty following Brexit and the current Covid-19 pandemic. Yields for retail parks across the five cities currently (May 2021) range between 6.1 % (Bristol) and 8.1% (Exeter).

7.15 A similar trend can be seen for shopping centres with Yields ranging between 5.5% and 7% during the time period. Yields appear to have levelled off (Cardiff, Exeter and Southampton) during 2019, in Leeds Yields slightly hardened (falling) before levelling off in 2020 whilst in Bristol Yields began softening in 2019. In all cities, Yields for shopping centres are forecasted to continue to soften into 2022 before levelling off again. Yields for shopping centres across the five cities currently (May 2021) range between 6.7% (Bristol and Southampton) and 7.2% (Cardiff).

7.16 Again, a similar trend can be seen for general retail with Yields ranging between 6% and 7.5% during the time period. Between 2014 and 2018 Yields were generally hardening to around 6% and 6.75%. During 2019 Yields began to soften and in all cities apart from Leeds (which levelled off at 7%) have continued to do. In all cities Yields for general retail are expected to continue to soften into 2022 before levelling off.

Availability Rate

7.17 AspinallVerdi have also undertaken a review of the availability rates across the five cities, this being the percentage of space available on the last day of each quarter. The total available sq.ft is divided by the total existing floorspace. It should be noted that with closure announcements including Arcadia Group, Debenhams, John Lewis (and soon Marks and Spencer) that occupy large amounts of floorspace fluctuations can be significant. In respect of the three retail centres:

- For shopping centres, the Availability Rate is highest in Southampton at 4.8% whilst Leeds and Exeter have the lowest Vacancy Rate at 2.6%;
- For retail parks, the Availability Rate is highest in Leeds at 6.2% whilst Exeter has the lowest Vacancy Rate at 0.20%; and,
- For general retail, the Availability Rate is highest in Cardiff 7.10% whilst Leeds has the lowest Availability Rate at 2.3%.

Summary

7.18 AspinallVerdi analysis of the four comparator cities has focused on the following key indicators:

- Overview and Key Indicators
  - Our analysis of net absorption identified that three of the cities (Bristol, Cardiff and Leeds) all experienced a negative net absorption indicating that more retail space was vacated and placed on the market than was leased. Exeter and Southampton on the other hand experience a positive net absorption indicating that demand for retail space in these cities increased during the review period.
- Net Internal Area
  - AspinallVerdi's analysis reviewed the total Net Internal Area of retail space in each of the five cities. This analysis identified Leeds as having more than 20m sq.ft of retail followed by Bristol with 15m sq.ft of retail. Exeter had the lowest amount of the retail space at just over 6m sq.ft.
- Vacancy Rates
  - In terms of vacancy rates, AspinallVerdi's analysis identified that for shopping centres the rate was highest in Exeter, For retail parks, the rate was highest in Leeds and for general retail, the rate was similar across four out of the five cities. With the ongoing Covid Pandemic it is possible that more units will become vacant.

- Market Rents and Yields
  - Rental values across the five cities were similar in relation to retail parks and general retail, ranging between £16 psf and £25 psf.
  - In terms of shopping centre rents, there was a greater variance across the five cities, the highest being Southampton at £56 psf and the lowest being for Cardiff at £24 psf.

    In respect of market yields, AspinallVerdi analysed evidence based on transactions which have occurred each year since 2009 in each of the five cities. For general retail yields ranged between 6% and 7.5% during the time period. Between 2014 and 2018 Yields were generally hardening to around 6% and 6.75%. During 2019 Yields began to soften and in all cities apart from Leeds (which levelled off at 7%) have continued to do so. In all cities Yields for general retail are expected to continue to soften into 2022 before levelling off.

- Availability Rate
  - This is calculated by dividing the total available sq.ft with the total existing floorspace.
    - For shopping centres, the availability Rate is highest in Southampton at 4.8%.
    - For retail parks, the availability Rate is highest in Leeds at 6.2%.
    - For general retail, the availability Rate is highest in Cardiff 7.10%

8 Population and Expenditure

The Study Area

8.1 In August 2020, a survey of 1,100 households was undertaken by NEMS within the defined Study Area in order to ascertain where residents go to undertake a range of shopping and leisure activities.

8.2 The Study Area comprises eleven zones which covers the Bristol authority area but also surrounding areas which look to retail and leisure facilities within Bristol to meet their retail and leisure needs (including but not limited to the city centre). As such, the study area also covers Bath and Trowbridge to the east and Weston-Super-Mare and Clevedon to the south west.

8.3 The extent of the Study Area adopted to inform the Bristol City Centre Retail Study of 2013 (which covers a significant geographical area), was sub-divided into 12 zones. We have considered the results of the household survey from 2013 within each of these 12 zones in detail and are of the view that the previously adopted Study Area generally reflects the catchment area of the city centre. However, in analysing the household survey results from 2013, we established that the principal exception to this is Zone 12 (covering the Newport area), where no material trade draw to Bristol City Centre was recorded.

8.4 As such, it was agreed between Nexus and the Council that Zone 12 of the 2013 Study could be removed from the Study Area without any detriment to its outputs. In all of the other zones, the previously recorded level of trade draw is such that the zone can appropriately be considered part of Bristol City Centre's catchment. In our view, a smaller Study Area would fundamentally undermine the Study's objectives as it would not include all residents who look to Bristol City Centre to meet at least some of their retail and leisure needs.

8.5 The defined Study Area has been broken down into eleven separate zones (in a manner which is also consistent with the previous Study) which reflect postcode sectors. The eleven zones are considered to be representative of geographic areas that may accommodate broadly similar patterns of shopping behaviour.

8.6 The Bristol city authority area broadly comprises Study Area zone 1, a part of zone 2 and the majority of zone 3. A copy of the Study Area is provided at Appendix 1.

8.7 The zones were used as the basis for the NEMS household survey, which is used to inform our assessment of shopping patterns (with relation to the market share of expenditure claimed by various destinations). The survey results also underpin the quantitative retail capacity assessment.

8.8 However, in order to consider the flow of expenditure to retail destinations, it is first necessary to estimate the population and future convenience and comparison goods expenditure apparent in the Study Area.

8.9 The population within each postcode sector and each zone at 2020 has been calculated using Experian Micromarketer G3 data (2018 estimate, which was issued in February 2020). In estimating the future population of the Study Area, consideration has been given to the authority's population projections across the period to 2035.

8.10 The Study Area population will increase from 1,699,885 persons at 2018 to 1,904,296 at 2035. This equates to an increase of 204,411 over the 17-year period. In this context, planning policy seeks to manage population increase and to support and encourage future growth.

Retail Expenditure

8.11 In order to calculate per capita convenience and comparison goods expenditure, we have again utilised Experian Micromarketer G3 data, which provides detailed information on local consumer expenditure that takes into consideration the socio-economic characteristics of the local population.

8.12 The base year for the Experian expenditure data is 2018. Our methodology takes account of the fact that some special forms of trading expenditure[21] is not available to support retail floorspace, and then allows for increases in per capita expenditure growth on an annual basis.

8.13 Figure 5 of Appendix 3 of ERPBN20 (February 2023) provides forecasts in respect of the proportion of convenience and comparison goods expenditure that will be committed through special forms of trading both now and in the future. We have 'stripped out' any survey responses which relate to expenditure committed via special forms of trading and have instead made an allowance derived from Experian's recommendations (which we consider to be the most appropriate means by which to account for such expenditure).

8.14 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a store's shelves or stockroom (particularly in the case of

[21] Identified as comprising sales via the internet, mail order, stalls and markets, door-to-door and telephone sales (i.e. all expenditure not available to traditional retail floorspace)

convenience goods). As such, expenditure committed in this manner acts to sustain shops and can be considered 'available' to support floorspace within the Study Area.

8.15 Accordingly, in order not to overstate the influence of special forms of trading on retailers, our methodology utilises Experian's 'adjusted' allowance for special forms of trading (which is provided at Figure 5 of ERPBN20). This allowance indicates that 3.8% of convenience goods expenditure and 18.4% of comparison goods expenditure is 'lost' from shops at base year 2019 through special forms of trading purchases.

8.16 Having made an allowance for special forms of trading, we then take account of projected changes in expenditure in accordance with the recommendations provided by Figure 6 of Appendix 3 of ERPBN20. Experian provides overall growth rates and 'adjusted' rates, which account for any additional increases in expenditure lost to special forms of trading.

8.17 For convenience goods, Experian forecasts very limited per capita expenditure growth across the entire period to 2035.

8.18 The position in respect of comparison goods expenditure is more positive. Experian forecasts that per capita comparison goods expenditure growth will increase from a decline of 18.1% at 2020 to 6.0% at 2021 and 2.0% at 2022 and will thereafter not exceed 3.8% per annum in the period from 2023 to 2035. Experian's forecast suggests that there will be relatively healthy growth in comparison goods even after accounting for expenditure lost to special forms of trading.

8.19 Growth in expenditure forecasts in the longer term (beyond the next ten years) should be treated with caution given the inherent uncertainties associated with predicting the performance of the economy over time (particularly in the current economic, health and political climates). As such, assessments of this nature should be reviewed on a regular basis in order to ensure that forecasts over the medium and longer term reflect changing circumstances.

8.20 In this regard, we also note that paragraph 85 of the revised NPPF requires local planning authorities to allocate sites to meet likely needs **'...looking at least ten years ahead'**, which differs from the previous requirement to meet needs across the entire plan period. We believe that this change directly reflects current economic conditions and changes in the retail sector in recent years. By applying Experian's recommendations in respect of special forms of trading and expenditure growth, we are able to produce expenditure estimates for each survey zone and the Study Area as a whole at 2020, 2025, 2030 and 2035.

Comparison Goods Expenditure

8.21 For comparison goods, Table 8.1 sets out our estimate that the resident population of the Study Area will generate £5,160.6m of comparison goods expenditure at 2020. Available comparison goods expenditure is then forecast to grow significantly to £7,726.0m at 2035. As identified at Table 8.2, this represents a substantial increase of £2,565.3 between 2020 and 2035. The large majority of this growth is forecast to occur in the medium to longer term (i.e. after 2025).

Table 8.1: Total Available Study Area Comparison Goods Expenditure

2020 (£m)	2025 (£m)	2030 (£m)	2035 (£m)
5,160.6	5,696.2	6,583.7	7,726.0

In 2019 Prices

8.22 The identified increase in comparison goods expenditure growth is substantial, but it represents a level of annual growth that is more circumspect than that which has been achieved in the past. This is due to both a reduction in the overall level of growth when compared to that achieved in the early part of this millennium and as a consequence of further forecast increases in expenditure committed via special forms of trading (most obviously, internet shopping).

Table 8.2: Growth in Available Study Area Comparison Goods Expenditure

Growth 2020-25 (£m)	Growth 2020-30 (£m)	Growth 2020-35 (£m)
535.6	1,423.1	2,565.3

In 2019 Prices

8.23 We sub-divide comparison goods expenditure into eight categories, these being: 'DIY', 'Electrical' and 'Furniture' (collectively referred to as bulky goods); and, 'Clothing and Footwear', 'CDs, DVDs and Books', 'Health, Beauty and Chemist Goods', 'Small Household Goods', and 'Toys, Games, Bicycles and Recreational Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis. Experian's estimates are reflected in the detailed expenditure tables set out at Table 7b of the Nexus Planning Quantitative Needs Assessment.

8.24 In considering expenditure growth, it should be noted that not all growth arising within the Study Area will be to support additional floorspace. Instead, account needs to be taken of: the market share of expenditure secured by retailers within the city centre; the claim made by existing retailers on expenditure growth (the future efficiency of retail floorspace); and, the expenditure that will be claimed by committed retail developments.

Convenience Goods Expenditure

8.25 Taking into account the Study Area resident population and the available per capita convenience goods expenditure, we estimate that £4,164.7m[22] of convenience goods expenditure originates within the Study Area at 2020. The below Table 8.3 indicates that available Study Area convenience goods expenditure is forecast to remain relatively static and decrease slightly to £4,206.3m at 2035.

Table 8.3: Total Available Study Area Convenience Goods Expenditure

2020 (£m)	2025 (£m)	2030 (£m)	2035 (£m)
4,292.5	3,962.2	4,078.9	4,206.3

In 2019 Prices

8.26 Table 8.4 indicates that this represents a decrease of -£86.1m across the Study Area between 2020 and 2035.

Table 8.4: Growth in Available Study Area Convenience Goods Expenditure

Growth 2020-25 (£m)	Growth 2020-30 (£m)	Growth 2020-35 (£m)
-330.3	-213.5	-86.1

In 2019 Prices

8.27 We have assumed that around 75% of available convenience goods expenditure would take the form of main food shopping and that around 25% would take the form of top-up shopping (which relates to smaller purchases, often including staple items such as milk and bread)[23].

[22] In 2019 prices, as is every subsequent monetary reference

[23] This is based on Nexus Planning judgement and is consistent with assumptions used and accepted elsewhere in undertaking such an exercise

9 Market Research: Spending Patterns

Introduction

9.1 An assessment of spending patterns is undertaken to identify where residents across the study area are currently undertaking their convenience (food) and comparison (non-food) spending. This exercise is important to establish how much money is spent in centres within Bristol, and particularly the city centre and how much 'leaks' to other destinations in South Gloucestershire, Bath and further afield.

9.2 In undertaking the assessment of quantitative need for the city centre and in accordance with the approach adopted in the 2013 Study, it is important to understand the market shares attracted by existing city centre destinations (both convenience and comparison). It is these market shares which we then adopt in calculating the potential future capacity for additional floorspace as set out at Section 9.

9.3 As such, we provide below an analysis of existing shopping patterns within the study area, current retention rates of market share within the zones, and provide details of the key comparison and convenience destinations.

Comparison Shopping Patterns

9.4 Table 9.1 below provides the principal comparison destinations within and outside of the Study Area. The table demonstrates that the principle destinations for residents in the entire Study Area are Cribbs Causeway (accounting for both the Mall and the retail parks), which attracts 16.2% of the total comparison expenditure, followed by Bristol City Centre at 9.3% and Bath city centre at 7.8%.

9.5 As of 2012 (prepared for the 2013 Study), the city centre destinations attracted a total of £685m of the available £4,789m comparison goods expenditure within Zones 1-11 of the Study Area. This equated to 14.3% of the available expenditure generated by residents within the eleven zones. As such, the market share of the city centre has decreased by 5.5 percentage points in eight years.

9.6 In terms of Cribbs Causeway (Mall only), the market share has increased by 4.5 percentage points since 2013 which was cited as being 6.5% (see paragraph 4.36 of the 2013 Study) and is now calculated to be 11.0% (from Zones 1 to 11).

9.7 However, when looking at residents in Zones 1 to 3 only, the market share of expenditure attracted to facilities in Bristol City Centre is higher at 17.6%, with the market share attracted to Cribbs Causeway (Mall and retail parks) totalling in 20.7%. The Mall only figure from Zones 1 to 3 is 13.2% at 2020.

9.8 As of 2012, the comparable comparison market share figure for the city centre from residents in Zones 1 to 3 was 25.6%, therefore representing a decrease in market share of 8.0 percentage points, and the Cribbs Causeway Mall figure from Zones 1 to 3 was 9.1%, therefore representing an increase in 4.1 percentage points since 2012.

9.9 As such, when considering both the Study Area as a whole, and the zones which broadly cover the Bristol city authority area, there has been a notable decrease in comparison expenditure attracted by facilities in the city centre, and a respective increase attracted by facilities at Cribbs Causeway. It is this shift in shopping patterns which gives cause for concern, and a potential longer change in habits which could have wider implications on the performance of the city centre looking into the future.

Table 9.1: Total Comparison Expenditure Summary – Principal Destinations

Comparison Spending Patterns	2020 Study Area Residents' Expenditure (£m)	2020 Study Area Market Share (%)	2020 Zone 1-3 Residents' Expenditure (£m)	2020 Zone 1-3 Residents' Market Share (%)
Destinations in Bristol Authority Area				
Bristol City Centre	478.8	9.3%	360.9	17.6%
Imperial Retail Park, Wills Way	102.8	2.0%	93.5	4.6%
Ikea, Eastgate Retail Park, Bristol	80.5	1.6%	44.5	2.2%
Brislington Retail Park	59.6	1.2%	35.7	1.7%
Other Destinations in the Study Area				
Cribbs Causeway (the Mall only)	565.4	11.0%	270.1	13.2%
Cribbs Causeway (retail park)	268.2	5.2%	153.3	7.5%
Bath City centre	400.1	7.8%	34.5	1.7%

9.10 In light of the above, it is also useful to review the findings of the survey undertaken to support the Joint Retail Assessment produced in respect of the Public Inquiry relating to the development at Cribbs Causeway. The 2012 household survey was the basis for the evidence produced by the Council for the Inquiry, which covered a Study Area with a total of 12 zones. Importantly however, Zones 1-11 correspond with the eleven zones adopted in the previous city centre Study and which have subsequently been adopted as part of the 2020 Study. We are therefore able to concentrate the comparative exercise on these zones specifically.

9.11 As of 2012, Bristol City Centre retailers attracted a total of 17.1% of the available expenditure generated by residents in Zones 1 to 11 of the Study Area, which is 7.8 percentage points higher than the market share calculated from the 2020 household survey. The level of expenditure attracted to the Mall at Cribbs Causeway equated to 8.5% of the available expenditure from Zones 1 to 11 and the retail parks attracting 6.6% (15.1% in total to both the Mall and the retail parks) at 2012. The corresponding figure at 2020 is 16.2%, indicating the proportion of available expenditure within the Study Area attracted to the destinations at Cribbs Causeway has increased, albeit not to the same level of the decrease in the proportion of expenditure attracted to the city centre.

9.12 Table 9.2 below then sets out the level of comparison expenditure retention within Zones 1 to 3 of the Study Area. The purpose of this analysis is to understand how existing facilities in each respective zone satisfactorily meets residents' needs and provides for sustainable shopping opportunities.

9.13 We can see that the level of comparison retention from Zone 1 residents' spending to facilities within Zone 1 (which covers the city centre), is at 47.7%, with a further 42.1% of the expenditure being spent at facilities within Zone 2 (which covers Cribbs Causeway). In total, 96.6% of Zone 1 residents' expenditure is being spent at facilities located within Zones 1 to 3.

9.14 Looking more specifically at Zone 1 residents shopping habits, if we focus in on clothing and footwear shopping in the first instance, the city centre attracts a total of 39.8% of clothing and footwear trips from Zone 1 residents as of 2020. The same figure for Zone 2 residents is 16.7% and for Zone 3 residents is 40.7%. The comparable figures as of the 2012 household survey were 56.5%, 30.8% and 54.3% respectively. The proportion of clothing and footwear trips attracted to the city centre has therefore decreased for Zones 1 to 3 residents, being those located closest to the city centre.

9.15 In terms of Zone 2 residents, 20.5% of the available comparison expenditure is being spent at facilities within Zone 1, and 67.6% at Zone 2 facilities. Finally, for Zone 3 residents, 58.5% of available comparison expenditure is being spent at facilities also located in Zone 3, with 25.9% in Zone 1 followed by 12.3% in Zone 2.

Table 9.2: Comparison Expenditure Retention Levels (Zones 1 – 3)

	Zone 1 Spending		Zone 2 Spending		Zone 3 Spending	
	£m	%	£m	%	£m	%
Zone 1	329.9	47.7%	180.4	20.5%	127.9	25.9%
Zone 2	291.1	42.1%	594.5	67.6%	60.9	12.3%
Zone 3	47.3	6.8%	37.1	4.2%	289.5	58.5%
Total	668.4	96.6%	811.9	92.4%	478.3	93.7%

9.16 Looking in more detail in respect of shopping patterns, we are able to establish the attraction of the city centre in respect of each of the eight key comparison categories surveyed in the household survey. In reviewing the market shares for each of the eight comparison categories, it is also useful to compare these with the relative market shares attracted by the facilities at Cribbs Causeway (both the Mall and the retail park operators). Table 9.3 below provides this analysis at 2020, by calculating the market share based on the available expenditure across the Study Area.

Table 9.3: Total Comparison Expenditure – Comparison Sector Breakdown (Study Area)

Comparison Goods Sector	Bristol City Centre – 2020 Total Market Share Based on Available Expenditure	Cribbs Causeway Mall – 2020 Total Market Share Based on Available Expenditure	Cribbs Causeway (Mall and Retail Park) – 2020 Total Market Share Based on Available Expenditure
Clothing and Footwear	17.2%	18.2%	19.5%
Books and CDs	17.0%	12.6%	12.7%
Household Goods	4.6%	13.4%	18.6%
Toys and Recreational Goods	9.0%	10.0%	18.1%
Chemist Goods	7.4%	3.6%	4.3%
Electrical Goods	3.7%	12.4%	26.4%
DIY Goods	2.1%	0.7%	9.4%
Furniture	1.8%	5.0%	20.8%

9.17 We can establish from the above that both Bristol City Centre and Cribbs Causeway are key destinations for purchasing clothing and footwear and books and CDs. However, Cribbs Causeway attracts substantially more household goods, toys and recreational goods, electrical goods and furniture goods expenditure when compared to Bristol City Centre.

9.18 This is not unsurprising in terms of the bulky goods (electrical, DIY and furniture) given the business model format and typical specific operator requirements in association with bulky goods retailers requiring adjacent car parking to transport goods, and larger, unrestricted unit formats and layouts. However, it is perhaps a little more surprising in terms of the non-bulky goods, given that the city centre is typically focused on selling these types of comparison goods and the centre's attraction to shoppers to purchase these types of goods. We explore the implications of this shift in shopping habits as part of our recommendations for the city centre.

9.19 In this regard, as was the case with the previous city centre Study, both the city centre and the Mall attract relatively low market shares of expenditure for furniture, but the out of centre retail parks attract substantially higher proportions.

9.20 In terms of clothing and footwear, whilst this is the highest proportion of each comparison goods sector attracted to the city centre at 17.2% at 2020, this figure has reduced significantly since 2013 when the city centre attracted 25.2% of the available clothing and footwear expenditure, and the Mall attracts a higher proportion from across the Study Area.

9.21 Table 9.4 below provides the proportion of expenditure attracted to the principal destinations of Bristol City Centre and Cribbs Causeway, from residents located in Zones 1 to 3 only.

9.22 If we consider the expenditure generated by residents in Zones 1 to 3 only (the zones which broadly cover the Bristol authority area), the proportion of clothing and footwear expenditure attracted to the city centre is higher at 30.5% compared to the Mall at 21.4%. This indicates that the Mall draws higher proportions of clothing and footwear expenditure from the zones which fall outside of the city's authority area, and that the city centre generally draws higher proportions from residents in the authority area itself. As of 2014, the comparable proportion of clothing and footwear expenditure attracted to the city centre from Zones 1 to 3 residents was 42.6%, which again indicates a reduction in market share based on available expenditure since the previous study. As of 2021, the comparable proportion of clothing and footwear expenditure from Zones 1 to 3 residents attracted to the Mall at Cribbs Causeway accounted for 12.1% of the available expenditure. The proportion has therefore considerably increased since 2012.

9.23 However, there is still a clear pull from those zones closer to the city centre, to Cribbs Causeway, indicating a desire to choose the out of centre facilities over the city centre. It is also an indication of the wide-ranging draw of Cribbs, and perhaps a more localised shopping role the city centre is providing, despite its size and level of floorspace available. Access, convenience and ability to park freely at Cribbs may be one reason why it is proving popular.

9.24 There are of course other key comparison shopping destinations within the Study Area which are also drawing residents' trips and expenditure. For example, Gallagher Retail Park which includes a range of both non-bulky and bulky comparison operators is a popular choice for Zone 1, 2 and 3 residents and Imperial Retail Park at Wills Way, which also provides for a range of types of comparison operators, is a key destination for Zone 3 residents in particular. Overall therefore, whilst the city centre has seen a reduction in comparison market share in terms of both trips and expenditure, this is not just due to the attraction of Cribbs Causeway and is instead in light of a range of destinations across the Study Area.

Table 9.4: Total Comparison Expenditure – Comparison Sector Breakdown (Zones 1-3)

Comparison Goods Sector	Bristol City Centre – 2020 Zones 1-3 Market Share Based on Available Expenditure	Cribbs Causeway Mall – 2020 Zones 1-3 Market Share Based on Available Expenditure	Cribbs Causeway (Retail Park) – 2020 Zones 1-3 Market Share Based on Available Expenditure
Clothing and Footwear	30.5%	21.4%	1.9%
Books and CDs	39.9%	16.4%	0.0%
Household Goods	8.9%	14.5%	6.2%
Toys and Recreational Goods	16.9%	10.7%	11.2%
Chemist Goods	16.2%	6.7%	1.5%
Electrical Goods	6.3%	15.2%	20.1%
DIY Goods	5.5%	1.8%	18.6%
Furniture	3.4%	3.2%	21.2%

Convenience Shopping Patterns

9.25 Table 9.5 below provides the top five destinations in Bristol based on the level of convenience expenditure attracted.

Table 9.5: Total Convenience Expenditure Summary

Convenience Spending Patterns	2020 Study Area Residents' Expenditure	2020 Market Share (%)
Destinations in Bristol Authority Area		
Tesco Extra, Callington Road, Brislington, Bristol	£87.1m	2.0%
Asda, East Street, Bedminster, Bristol	£79.1m	1.8%
Tesco Extra, Eastgate Retail Park, Eastville, Bristol	£74.0m	1.7%
Morrisons, Fishponds Road, Bristol	£62.4m	1.5%
Tesco Superstore, Lime Trees Road, Golden Hill, Bristol	£56.8m	1.3%

9.26 In terms of other principal destinations, within Bristol the Asda on East Street in Bedminster, the Tesco Extra on Eastgate Retail Park and the Morrisons on Fishponds Road all attract over £60m.

9.27 Table 9.6 below provides the main, top up and total retention of expenditure on a zonal basis. The retention level demonstrates the proportion of residents residing in that zone who also shop at destinations in the same zone. We can see that in terms of main food expenditure, the highest retention is within Zones 7 (Chippenham/Trowbridge), Zone 8 (Bath), Zone 3 (south Bristol) and Zone 5 (Weston-Super-Mare) within which over 90% of the main food trips are retained, three of which contain larger towns within the Study Area. For the other two zones within Bristol (Zones 1 and 2), these retain 57.4% and 78.8% of their main food expenditure respectively. In this regard, the primacy of Bristol as the regional centre is reflective in the reduced retention of expenditure in these zones

and suggests that a number of those who use facilities within these two zones travel into them from outside of the Bristol authority area. Looking at Zone 1 in particular (which covers the city centre), we can see that 28.5% of main food trips are to destinations within Zone 2 including the Asda on Craven Way (6.7%) and the Morrisons on Fishponds Road (4.8%).

Table 9.6: Convenience Expenditure Retention by Zone

Zone	Main Food Expenditure Retention	Top-Up Food Expenditure Retention	Total Convenience Expenditure Retention Per Zone
1	57.4%	85.1%	64.3%
2	78.8%	79.2%	78.9%
3	91.6%	94.9%	92.4%
4	86.3%	89.2%	87.0%
5	90.4%	83.7%	88.7%
6	86.1%	91.5%	87.4%
7	94.0%	97.9%	95.0%
8	92.0%	98.0%	93.5%
9	77.9%	78.2%	78.0%
10	89.0%	97.5%	91.1%
11	78.1%	91.2%	81.3%

9.28 In terms of top-up food shopping trips, the retention levels are higher in the eight zones overall which is not unexpected given that residents will typically travel short distances to meet their top-up shopping needs. The highest retention can be seen in Zones 8 (Bath) and 7 (Chippenham/Trowbridge), followed by Zones 10 (Stroud) and 3 (south Bristol). However, all of the zones except Zone 2 (north Bristol) have a top-up shopping retention level of over 80%.

Summary and Conclusions

9.29 The following provides a summary of the key findings in respect of both the comparison and convenience shopping habits identified within the household survey.

Comparison Shopping Trips

9.30 Bristol City Centre has witnessed a decline in the total level of comparison expenditure attracted to city centre destinations since the previous City Centre Study was published. As of 2012, Bristol City Centre retailers attracted a total of 17.1% of the available expenditure generated by residents in Zones 1 to 11 of the Study Area, which is 7.8 percentage points higher than the market share calculated from the 2020 household survey. The level of expenditure attracted to the Mall at Cribbs Causeway equated to 8.5% of the available expenditure from Zones 1 to 11 and the retail parks attracting 6.6% (15.1% in total to both the Mall and the retail parks) at 2012. The corresponding figure at 2020 is 16.2%, indicating the proportion of available expenditure within the Study Area attracted

to the destinations at Cribbs Causeway has increased, albeit not to the same level of the decrease in the proportion of expenditure attracted to the city centre.

9.31 This is particularly apparent when we look at clothing and footwear expenditure specifically from Zones 1 to 3 residents (which broadly covers the Bristol authority area), which accounts for just under a quarter of residents' comparison spending. In this regard, there has also been a significant reduction in the level of clothing and footwear expenditure being attracted to the city centre destinations, and an increase to retailers particularly at the Mall at Cribbs Causeway.

Convenience Shopping Trips

9.32 In terms of convenience shopping trips, the principal destinations for convenience goods shopping across the Study Area as a whole are Asda on Craven Way in Longwell Green which attracts 3.3% of available expenditure, followed by Asda at Highwood Lane near Cribbs Causeway which attracts 2.1% of the total available convenience expenditure, followed by the Tesco Extra on Callington Road in Bristol which attracts 2.0% of available expenditure. In terms of city centre destinations, the principal destination is the Tesco Metro in Broadmead, followed by the Marks and Spencer foodhall also in Broadmead.

9.33 Overall, the main food retention level within Zone 1 is relatively low at 57.4%, indicating an overall lack in main food shopping provision within the centre of Bristol, which is noted as part of the city centre context provided earlier in the Study. However, the top-up convenience retention rate within Zone 1 is higher at 85.1% which indicates that the convenience provision within the city centre is serving a more top-up function for residents.

10 Assessment of Retail Capacity

10.1 Our retail capacity tables set out our step-by-step approach to estimating quantitative retail need and are provided at Appendix 7. A summary of our methodological approach, together with our findings, is provided below.

10.2 As set out in the introductory paragraphs of this Report, following Nexus's appointment to prepare the Bristol City Centre Study, Nexus was also appointed in December 2021 to undertake an authority-wide study which focused on the other centres in the defined hierarchy within Bristol, comprising the town, district and local centres.

10.3 The authority-wide study is also underpinned by a household survey undertaken by NEMS Market Research, which focuses on a substantially smaller area than that which has been adopted for the purposes of this Study. The household survey was undertaken by NEMS Market Research ('NEMS') in March 2022 and covers 18 separate zones, which are collectively considered representative of the principal catchment area for retail facilities within Bristol. The number of zones ensures that one of the key outputs of the Study – to better understand the catchments of centres, where people are travelling to and from to meet their retail and leisure needs, and to better understand the potential quantitative and qualitative deficiencies within the authority area – is achieved.

10.4 Given the above, and the availability of a separate household survey which has also been commissioned by the Council to help support the future planning of the defined centres within the authority area, we have therefore provided a separate standalone appendix (Appendix 8) which provides the capacity findings based on the latest household survey from 2022. In light of the two household surveys covering two different Study Areas of two different spatial areas of Bristol and them being commissioned in different years, the two sets of capacity figures for the city centre are not identical.

General Approach to Estimating Need

10.5 Retail capacity modelling follows the basic principle that: Available Expenditure minus Expected Turnover of Existing and Committed Floorspace equals Expenditure Surplus or Deficit. We summarise the key considerations relating to each component of the equation below.

Available Expenditure

10.6 As we set out in Section 7 of this report, available expenditure within a zone is calculated by multiplying the population at a given reporting year by the estimated per capita expenditure. The available expenditure takes into consideration:

- estimated population growth;
- forecast increases in per capita expenditure; and
- forecast increases in special forms of trading.

Turnover

10.7 The turnover relates to the expenditure required by existing retailers (and by retail commitments benefitting from an extant planning permission) in order to ensure that they trade viably. For convenience goods retailers, the expected 'benchmark' turnover of existing convenience goods facilities is calculated with reference to GlobalData Convenience and Comparison Goods Sales Densities of Major Grocers 2018 and Mintel Retail Rankings 2018 data[24].

Surplus/Deficit

10.8 The expenditure surplus (or deficit) is calculated by subtracting the turnover of existing and committed floorspace from the available expenditure in each of the authority areas. A surplus figure effectively represents an under-provision of retail facilities within Bristol City Centre (which may indicate that additional floorspace could be supported), whereas a deficit would suggest a quantitative over-provision of retail floorspace.

10.9 Although a surplus is presented as a monetary figure, it can be converted to a floorspace requirement through the application of an appropriate sales density. In this regard, the floorspace requirement will vary according to operator and the likely sales density they could achieve. For example, in the case of comparison goods, non-bulky goods retailers tend to achieve higher sales densities than bulky goods retailers. However, within the bulky goods sector there is significant variation in the sale densities of bulky operators, with electrical retailers typically having higher sales densities than DIY or furniture retailers.

[24] These datasets provide independent analysis of key grocery retailers' declared turnover and the overall floorspace in their portfolio in order to calculate national average sales densities

10.10 The turnover of destinations is generally considered with reference to retailers' net sales areas and all of the following floorspace figures relate to net sales areas. Our assessment considers convenience and comparison goods needs across Bristol City Centre.

Capacity for Future Comparison Goods Floorspace

10.11 Our methodology in calculating comparison goods capacity deviates from that employed in respect of convenience goods. This is because it is difficult to accurately estimate a benchmark turnover for comparison goods floorspace, both because of the number of units involved (which are occupied by a wide variety of retailers), and due to the variation in the trading performance of floorspace depending on its location, the character of the area and the nature of the catchment.

10.12 As a consequence, we adopt the position for comparison goods floorspace that it is trading 'at equilibrium' at base year 2020 (i.e. our survey derived turnover including the tourism inflow estimate effectively equates to the benchmark trading performance).

10.13 We have given consideration to the likelihood of any material inflow of expenditure originating outside the Study Area to comparison stores located within the city centre. We note that the 2013 City centre Study apportioned a 2.5% inflow as part of the impact assessment and we have again adopted this approach. Importantly, the same inflow was adopted as part of the Inquiry Evidence for the Cribbs Causeway Call-In Appeal and accepted by the Inspector (see paragraph 643 of Appeal Decision APP/P0119/V/17/3170627).

10.14 Taking the above into account, we then assume that there is a nil quantitative need for any additional comparison goods floorspace across the city centre at 2020. Going forward, we again assume that the performance of comparison goods facilities will be commensurate with the identified market share currently claimed by such provision within the city centre.

10.15 The £471.2m of comparison goods expenditure that originates in the Study Area and is claimed by facilities within the city centre equates to a market share of 8.9% of all such comparison goods expenditure.

10.16 By making provision for inflow and 'rolling forward' this market share, our assessment estimates that existing facilities within the city centre will attract £520.1m at 2025, increasing to £601.1m at 2030, and then to £705.4m at 2035.

10.17 As Table 10.1 sets out, given forecast increases in comparison goods expenditure and allowing for annual forecast changes in the productivity of existing floorspace, we estimate that, at 2025, there

will be an expenditure deficit of -£0.6m, increasing to a surplus of £21.7m at 2030 and at 2035, we estimate a surplus expenditure of £40.2m once inflow has been taken account of.

Table 10.1: Quantitative Need for Comparison Goods Floorspace in Bristol City Centre

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)
2020	471.2	459.7	0.0
2025	520.1	507.4	-0.6
2030	601.1	586.4	21.7
2035	705.4	688.2	40.2

Source: Appendix 7
Notes: Assumes constant market share (8.9%) of Study Area expenditure claimed by facilities in Bristol City Centre; allows for changes in benchmark turnover sales efficiency in accordance with Table 4b of Experian Retail Planner Briefing Note 20

10.18 The above assessment does not take into consideration existing commitments and their claim on the identified expenditure surplus.

10.19 In calculating the total turnover of commitments, we have taken account of all of the committed development which is likely to have a draw on expenditure which would otherwise be attracted to city centre operators and undertaken a review of the likelihood of whether extant commitments would in fact come forward. In undertaking this review, we have assessed whether the commitments may no longer be implemented due to changes in the commercial climate or indeed if other developments have come forward instead. Given the current commercial climate and the nature of new mixed-use schemes, we consider it unlikely that the development would come forward for comparison floorspace in particular. We comment below on the implications should the commitments be stripped out for the purposes of the capacity model.

10.20 Planning permission was granted in 2018 for the redevelopment of an existing retail area which was allocated in the local plan for major retail-led mixed-used redevelopment. The permission was for up to 102,480 sq.m of retail, commercial, leisure and hospitality floorspace with up to 150 dwellings. This permission was granted when the commercial market was expecting higher levels of demand for new retail space than is currently likely to be the case and so it is unlikely that the permission will be taken forward in its current format. For that reason we have not accounted for this permission as a commitment.

10.21 In considering comparison goods commitments, it is again relevant to note that the capacity assessment is based on the market share of the city centre being maintained going forward.

10.22 Once the turnover of commitments which are likely to be implemented has been taken account of, we do not identify any capacity for additional comparison floorspace in the short or medium term. In the longer term from 2030 onwards, we identify a capacity of between 1,600 and 2,700 sq.m at 2030 and between 3,400 and 5,800 sq.m at 2035.

10.23 This analysis has been undertaken to date on the assumption that the city centre's market share will remain at a consistent level across the plan period. However, if it were the case that a substantial new development were to come forward in the city centre, there is the potential for there to be an increase in available expenditure to support additional floorspace. Given the current commercial climate however, it is sensible to plan for the market share to remain consistent.

Table 10.2: Quantitative Need for Comparison Goods Floorspace in Bristol City Centre after Commitments

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2020	0.0	8.1	-8.1	-1,300	-2,300
2025	-0.6	8.9	-9.5	-1,400	-2,500
2030	21.7	9.9	11.8	1,600	2,700
2035	40.2	11.4	28.9	3,400	5,800

Notes: Assumes constant market share (8.9%) of Study Area expenditure claimed by facilities in Bristol City Centre; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 20; minimum floorspace requirement based on an assumed sales density of £3,500 per sq.m at 2020; maximum floorspace requirement based on an assumed sales density of £6,000 per sq.m at 2020
In 2019 prices

Capacity for Future Convenience Goods Floorspace

10.24 In order to identify the likely need for additional convenience goods floorspace within the city centre, it is first necessary to consider the performance of the current provision.

10.25 Based on the existing market share, we estimate that £68.0m of convenience goods expenditure which originates within the Study Area is claimed by retailers in the city centre at 2020. The existing market share comprises the following key convenience destinations:

- Local shops, Bristol City Centre;
- Tesco Metro, Broadmead;
- Marks and Spencer, Broadmead;
- Sainsbury's, Queens Road; and
- Little Waitrose, Queens Road.

10.26 We have again given consideration[25] to the likelihood of any material inflow of expenditure originating outside the Study Area to foodstores located within the city centre. We note that the 2013 City centre Study did not apportion any inflow into the convenience goods assessment, as it was stated that convenience spending is typically more local. However, we consider there to be a prospect for both day and overnight visitors who reside outside of the Study Area to purchase convenience goods as part of their trip to the city and have therefore assigned a 2.5% inflow as part of the assessment.

10.27 For each convenience goods retail destination, the identified survey derived turnover is compared to its expected benchmark performance (which is estimated with reference to company average sales densities and the estimated net sales areas of individual shops). Our assessment assumes a 'goods based' approach, which disaggregates expenditure by sector, as it is important to recognise that major foodstore operators generally also sell some comparison goods, such as clothing, household goods, books and CDs. To account for this, the typical split between convenience and comparison goods provision for each operator has been identified[26] and this multiplier has been applied to the estimated net floorspace[27] of each foodstore. This provides an indication of the likely floorspace dedicated to the sale of convenience goods at each store and provides for an estimation of convenience goods benchmark turnover.

10.28 The calculation of the estimated benchmark turnover of individual stores allows an assessment to be made in respect of individual retailers' trading performance and whether (on an aggregated basis) surplus expenditure exists to support additional floorspace. For smaller shops (where it is more difficult to collate accurate floorspace and sales density data), we assume that stores are trading 'in equilibrium' (i.e. the survey-derived turnover equates to the anticipated benchmark turnover). Our assessment is summarised below at Table 9.3 and identifies that convenience goods floorspace in Bristol has an expected benchmark turnover of £39.8m at 2020, which is below the estimated survey derived turnover including inflow of £69.7m. As such, taken collectively, convenience goods floorspace is 'overtrading' (i.e. its turnover is less than would be expected by reference to company average performance) by £29.9m.

[25] With reference to the Study Area boundary, the location of foodstores within it, and the spatial distribution of the population that lies beyond it

[26] Generally sourced from GlobalData Convenience and Comparison Goods Sales Densities of Major Grocers 2018, except where we believe that this data is not likely representative of how a store trades in practice. Detailed notes in respect of our approach in calculating net convenience goods sales areas are provided at Table 5 of Appendix 2

[27] The floorspace of individual stores is derived from Valuation Office Agency records (using typical gross to net multipliers where required)

10.29 In order to appraise the future need for additional convenience goods floorspace, it is necessary to consider how the performance of stores will be affected by forecast expenditure growth. Accordingly, Table 10.3 also sets out the anticipated increases in expenditure that will be available to convenience goods retailers within Bristol City Centre, assuming the current convenience goods market share is maintained. We have assumed that the benchmark turnover of floorspace will change going forward in accordance with the forecast changes in floorspace efficiency set out in ERPBN20.

10.30 Table 10.3 sets out our estimate that the convenience goods expenditure available to facilities in Bristol City Centre. Table 9.4 indicates that before commitments are taken into account, there is an estimated surplus in convenience expenditure of £29.9m at 2020, increasing to £29.8m at 2030 and £31.9m at 2035.

Table 10.3: Quantitative Need for Convenience Goods Floorspace in Bristol City Centre

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)
2020	39.8	69.7	29.9
2025	36.3	64.3	28.1
2030	36.4	66.2	29.8
2035	36.4	68.3	31.9

Notes: Assumes constant market share (1.6%) of Study Area expenditure claimed by facilities in Bristol City Centre; allows for changes in benchmark turnover sales efficiency in accordance with Table 4b of Experian Retail Planner Briefing Note 20
In 2019 prices

10.31 In considering the future position in respect of convenience goods needs, it is also necessary to take into consideration commitments and the claim these may make on expenditure.

10.32 We estimate that extant retail planning permissions together provide approximately 7,204 sq.m of convenience goods sales floorspace across Bristol City Centre, and that this floorspace would have a turnover of around £33.9m at 2020 (if it was operational).

10.33 Convenience goods commitments are generally limited to relatively small-scale convenience stores and floorspace which is contained within larger mixed-use developments. However, there are two larger schemes proposed at Dove Lane (reference 17/02066/X) and Redcliffe Quarter (16/02349/F) which could both ultimately accommodate a medium-scale convenience operator given the controls imposed on the planning permission. However, given the nature of the proposals, their location and respective likely draw, it is unlikely that larger convenience floorplates will come forward and should any additional convenience floorspace be delivered as part of the commitments, these will also likely be smaller scale. For completeness however, these commitments have been included within the assessment.

10.34 As such, in allowing for the turnovers of the commitments within the capacity model, we have adopted a robust approach to take account of all committed floorspace. It is likely that the turnover of the commitments would be reduced however, given that it is unlikely that all of the floorspace permitted would be used for the sale of convenience goods.

10.35 Full details of the assumptions made in estimating the turnover of convenience goods commitments are provided in the notes that accompany Appendix 7.

10.36 After an allowance has been made to account for the turnover of commitments, there is no identified requirement for additional convenience floorspace over the plan period.

Table 10.4: Quantitative Need for Convenience Goods Floorspace in Bristol City Centre after Commitments

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2020	29.9	33.9	-4.0	-300	-400
2025	28.1	30.9	-2.8	-200	-300
2030	29.8	31.0	-1.2	-100	-100
2035	31.9	31.0	0.9	100	100

Notes: Assumes constant market share (1.6%) of Study Area expenditure claimed by facilities in Bristol City Centre; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 20; minimum floorspace requirement based on an assumed sales density of £12,580 per sq.m at 2020 (which equates to the average sales density of the 'big four' foodstore operators); maximum floorspace requirement based on an assumed sales density of £11,264 per sq.m at 2020 (which is typical figure for discount operators)
In 2019 prices

10.37 Whilst we have not identified a capacity for any additional convenience floorspace in the city centre based on a constant market share, the new store now opened in September 2022 and operated by Lidl will be going some way to meeting a local consumer demand and increase the qualitative offer within the city centre, particularly in meeting main food shopping needs of residents and workers. In this regard, from a qualitative perspective, the city centre itself is lacking in a main food shopping destination. Whilst this is not entirely unusual, operators such as Aldi and Lidl are adopting a city and town centre business model format which is built around providing quick and convenient access to convenience products, and less reliance on the requirement for adjacent car parking. The provision of a new foodstore which meets both main and top-up convenience needs within the city centre has the potential to increase the convenience market share going forward. Therefore, whilst the current assessment does not identify any capacity for additional floorspace (based on a consistent market share), this may alter going forward once the new floorspace has bedded-in and shopping patterns altered to reflect this.

10.38 New convenience provision will also assist in supporting any increase in population residing in the city centre and support sustainable economic growth.

11 Assessment of Leisure Capacity

Existing Market Share by Leisure Sector

11.1 The NEMS Household survey undertaken in September 2020 asked respondents to describe their leisure, recreation and cultural activities and habits. The responses to these survey questions (Questions 32 – 40) informs our understanding of leisure trends in the Study Area. The breakdown of these questions and responses are set out in full in Appendix 2. The key results have been extrapolated to inform the following section.

11.2 It is important to acknowledge that residents outside of Bristol may visit the facilities within the city centre for leisure purposes. In response to this, the Study Area (from which respondents were engaged) has been divided into the Inner Study Area and Outer Study Area. The Inner Study Area covers the Bristol Authority Area and includes Zones 1-3. The Outer Study Area covers Zones 4-11 and includes postcodes from Bath, Clevedon, Newport, Stroud, Wells, Weston-Super-Mare, Wiltshire and Wotton-under-Edge.

11.3 In the following section, we summarise and interpret the responses given to the NEMS household survey.

Participation in Leisure Activities

11.4 In the first instance, respondents were asked at Question 32 by NEMS which of the following leisure activities they participate in. Key findings from this question are identified in Table 11.1 and provided in full at Appendix 2.

11.5 The most popular response across the Study Area was visiting restaurants, pubs and bars, which 81.5% of respondents said they do. The second most popular activity across the Study Area was visiting cinemas, with 66.4% of respondents stating they do this. This is followed by visiting theatres, concert halls and live performance venues (at 59.0%). The least popular activity across the Study Area was visiting casinos and bingo halls, with only 5.0% of respondents stating they partake in this activity.

Table 11.1: Participation in Leisure Activities (%)

Activity	Study Area Average	Bristol Authority Area (Zones 1-3)	Outer Study Area (Zones 4-11)
Restaurants, Bars and Pubs	81.5	80.7	82.1
Cinemas	66.4	66.7	66.2
Theatres, Concert Halls and Live Performance Venues	59.0	61.5	57.2
Museums and Galleries	47.6	47.3	47.7
Health and Fitness	29.5	28.6	30.2
Family or Adult Leisure	28.0	28.6	27.6
None mentioned	9.6	10.3	9.1
Nightclubs	7.2	9.5	5.5
Casinos or Bingo Halls	5.0	6.8	3.8

Question 32 of NEMS Household Survey, Appendix 2

11.6 The trends for the Bristol authority area broadly follow the trends for the wider Study Area. There are no notable differences between the two data sets, albeit respondents within the authority area listed visiting nightclubs more than the Study Area average (9.2% compared to 7.2%) and visiting theatres, concert halls and live performance venues (61.5% compared to 59.0%) and casinos or bingo halls (6.8% to 3.8%).

Leisure Destinations

11.7 NEMS asked a series of questions to ascertain where respondents from each zone usually undertake their chosen leisure activity.

11.8 Table 11.2 indicates that Bristol City Centre and the authority area (including out of centre destinations such as AvonMeads Shopping Park and Aspects Leisure Park) is the key destination for leisure activities across the Study Area as a whole.

11.9 However, in regard to zones outside the Bristol authority area, the most popular destination for cultural and leisure activities varies. A more in depth analysis on a sector by sector basis of where residents visit to carry out their cultural and leisure activities follows.

Table 11.2: Most Popular Leisure Destinations by Zone (%)

Activity	Study Area Average	Bristol Authority Area (Zones 1-3)
Restaurants, Bars and Pubs	Bristol City Centre	Bristol City Centre
Nightclubs	Bristol City Centre	Bristol City Centre
Theatres, Concert Halls and Live Performance Venues	Bristol City Centre	Bristol City Centre
Museums and Galleries	Bristol City Centre	Bristol City Centre
Health and Fitness	Bristol City Centre	Bristol City Centre
Family or Adult Leisure	Bristol Authority Area	Bristol Authority Area
Casinos or Bingo Halls	Bristol Authority Area	Bristol Authority Area
Cinemas	Bristol Authority Area	Bristol Authority Area

Restaurants, Bars and Pubs

11.10 The NEMS Household Survey identifies the most popular leisure activity across the Study Area as visiting restaurants, bars and pubs. NEMS asked at Question 33 where respondents from each zone last visited a restaurant, pub or bar.

11.11 A high number of respondents identified their most recently visited location for restaurants was Bristol City Centre (20.7%), followed by Bath city centre in Zone 8 (8.5%) and Stroud (2.8%). 9.4% of respondents left the Study Area, to go to Cardiff city centre (0.9%) and other destinations.

11.12 Table 11.3 below highlights key findings from this information and carries out an in-depth analysis on a sector by sector basis of where residents visit. Market share was widely distributed across the Study Area. Bristol City Centre was the most popular destination for visiting restaurants, bars and pubs for Zones 1-3 at 38.1%. Only 9.0% of respondents from the wider study area (Zones 4-11) stated they visited Bristol City Centre.

Table 11.3: Top Destinations of Last Visited Restaurants, Bars and Pubs

Zone	1st		2nd		3rd	
	Name	Market Share (%)	Name	Market Share (%)	Name	Market Share (%)
1	Bristol City Centre	44.0	Clifton Village	8.0	Westbury Park Local Centre	4.0
2	Bristol City Centre	26.9	Fishponds Local Centre	7.0	Bath City Centre	5.4
3	Bristol City Centre	49.0	Keynsham Town Centre	11.6	Bath City Centre	5.4
4	Portishead Town Centre	19.7	Bristol City Centre	16.2	Clevedon Town Centre	14.2
5	Weston-Super-Mare Town Centre	34.7	Burnham-on-Sea Town Centre	13.8	Bristol City Centre	8.3
6	Bath City Centre	15.6	Wells City Centre	14.7	Bristol City Centre	14.0
7	Chippenham Town Centre	15.5	Trowbridge Town Centre	12.8	Frome Village Centre	9.6
8	Bath City Centre	72.6	Bristol City Centre	2.7	Gallagher Retail Park	2.5
9	Thornbury Town Centre	17.9	Yate Town Centre	14.9	Bristol City Centre	8.6
10	Stroud Town Centre	48.6	Nailsworth Town Centre	13.3	Gloucester Quays Outlet	6.0
11	Chepstow Town Centre	24.8	Cardiff City Centre	12.7	Cadicot Town Centre	11.2

Question 33 of NEMS Household Survey, Appendix 2

Nightclubs

11.13 In total, 7.2% of respondents within the Study Area visit nightclubs, with respondents within the Bristol Authority Area more likely to go to nightclubs (9.5% compared to 5.5%).

11.14 Overall, Bristol City Centre received 63.48% of the total market share, with 100% of the market share from Zones 1-3 and a total of 22.9% of respondents from the wider study area visited the City Centre. Respondents from Zones 4-11 visited destinations outside the study area including Newport City Centre (5.2%) and Plymouth City Centre (3.5%).

Theatres, Concert Halls and Live Performance Venues

11.15 The NEMS Household Survey asked respondents where they had last visited to go to a theatre, concert hall or live performance venue.

11.16 The overall top visited destination for cultural facilities was Bristol City Centre (54.7%). Of this total, 80.4% of respondents from the Bristol Authority Area (Zones 1-3) last visited Bristol City Centre. 35.7% of Zone 4-11 respondents stated they travelled to Bristol City Centre for a theatre performance, concert or live performance. Other popular destinations within the Study Area included Bath city centre, with 23.1% of respondents from the Outer Study Area visiting Bath.

11.17 Overall, 21.4% of total respondents had travelled outside the Study Area for theatres, concerts and live performances, to London's West End (9.9%), followed by Cardiff city centre (3.9%) and Cheltenham town centre (2.4%).

Table 11.4: Top Destinations of Last Visited Theatres, Concert Halls and Live Performances

Zone	1st		2nd		3rd	
	Name	Market Share (%)	Name	Market Share (%)	Name	Market Share (%)
1	Bristol City Centre	82.5	Central London / West End	6.6	Bath City Centre	3.1
2	Bristol City Centre	80.5	Bath City Centre	7.7	Stoke's Croft	2.1
3	Bristol City Centre	76.4	Central London / West End	12.2	Bath City Centre	5.7
4	Bristol City Centre	70.2	Bath City Centre	11.6	Central London / West End	5.3
5	Bristol City Centre	59.2	Weston-Super-Mare Town Centre	16.8	London West End	6.2
6	Bristol City Centre	45.0	Bath City Centre	19.5	Central London / West End	11.6
7	Bath City Centre	35.0	Central London / West End	27.4	Bristol City Centre	17.7
8	Bath City Centre	81.1	Bristol City Centre	16.7	Central London / West End	2.2
9	Bristol City Centre	48.7	Bath City Centre	17.3	Central London / West End	12.9
10	Cheltenham	39.1	Stroud Town Centre	13.6	Bristol City Centre	11.3
11	Cardiff City Centre	43.3	Bristol City Centre	26.8	London City Centre	18.5

Question 35 of NEMS Household Survey, Appendix 2

Family or Adult Leisure

11.18 Question 38 of the Household Survey asked respondents which facility they last visited for family or adult leisure activities. Family or adult leisure facilities include destinations such as tenpin bowling, soft play centres, crazy golf, multi-game social venues and escape rooms.

11.19 The principal destination recorded within the Study Area is the Hollywood Bowl at Cribbs Causeway (24.1%) followed by the Hollywood Bowl at Aspects Leisure Park (22.5%) and the Tenpin Bristol at 10.2%.

11.20 Table 11.5 demonstrates the market share on a zone by zone basis. The Table also demonstrates that relatively high proportions of trips for family or adult leisure activities are being attracted to the Hollywood Bowl at Cribbs Causeway (for Zones 1 and 2 residents in particular) and the Hollywood Bowl at Longwell Green for Zone 3 residents. Tenpin bowling facilities on the whole are also the most popular adult or family leisure destinations.

Table 11.5: Most Visited Family or Adult Leisure Destinations by Zone

Zone	1st		2nd		3rd	
	Name	Market Share (%)	Name	Market Share (%)	Name	Market Share (%)
1	Hollywood Bowl Longwell Green	30.8	Hollywood Bowl Bristol, Cribbs Causeway	30.6	Wacky Warehouse, Bristol	13.1
2	Hollywood Bowl Longwell Green	44.9	Hollywood Bowl Bristol, Cribbs Causeway	25.8	Aspects Leisure Centre	12.5
3	Tenpin Bristol AvonMeads	43.4	Hollywood Bowl Longwell Green	24.9	Hollywood Bowl Bristol, Cribbs Causeway	14.1
4	Hollywood Bowl Bristol, Cribbs Causeway	73.0	Weston-Super-Mare Town Centre	10.8	Clevedon Town Centre	6.7
5	Hollywood Bowl Bristol, Cribbs Causeway	41.0	Hollywood Bowl Longwell Green	13.0	Taunton Town Centre	12.9
6	Hollywood Bowl Longwell Green	38.5	Hollywood Bowl Taunton, Heron Gate, Taunton	13.2	Hollywood Bowl Bristol, Cribbs Causeway	9.1
7	Trowbridge Town Centre	30.0	Hollywood Bowl Longwell Green	21.0	Tenpin Swindon	10.4
8	Bath Sports and Leisure Centre, Bathwick, Bath	27.0	Hollywood Bowl Longwell Green	16.8	Tenpin Bristol AvonMeads	16.0
9	Hollywood Bowl Longwell Green	42.5	Plymouth City Centre	12.7	Tenpin Gloucester	12.7
10	Go Bananas, Stroud	25.7	Stroud Bowl	19.7	Cainscross Town Centre	17.6
11	Superbowl UK Newport, John Frost Square, Newport	27.0	Hollywood Bowl Bristol, Cribbs Causeway, Bristol	16.9	Hollywood Bowl Cwmbran, Glyndwr Road, Cwmbran	10.9

Question 38 of NEMS Household Survey, Appendix 2

Casinos and Bingo Halls

11.21 A total of 5.0% of respondents across the study area stated that they visit casinos or bingo halls.

11.22 Question 39 of the NEMS Household Survey asked respondents which casino or bingo hall they had last visited. The Bristol Authority Area accommodates three casinos, Genting Casino and Grosvenor Casino in Bristol City Centre, and Rainbow Casino. There are four dedicated bingo halls within the Authority Area, including Buzz Bingo, Fishponds, Buzz Bingo, Hengrove Leisure Park and Club 3000 Bristol.

11.23 The top visited casino across the Study Area was Rainbow Casino (27.7%) while the top visited bingo hall was Buzz Bingo, Fishponds (21.9%).

11.24 A leakage of 12.3% of the market share to casinos and bingo halls outside the Study Area was noted.

Cinemas

11.25 A total of 66.4% respondents within the Study Area visit the cinema. Question 40 of the NEMS Household Survey asked which cinema respondents had last visited.

11.26 The most recently visited cinema across the study area is Vue at Cribbs Causeway (at 17.2%), closely followed by Vue at the Aspects Leisure Park in Longwell Green (16.6%).

11.27 The top visited cinemas by respondents from the Bristol Authority Area was Vue at Aspects Leisure Park (31.1%); the Orpheus Cinema in Henleaze (19.1%), followed by Vue at Cribbs Causeway (18.8%).

11.28 Despite the presence of the Odeon on Union Street and the Showcase Cinema deLux on Broadmead, alongside the smaller boutique offer such as The Screening Room, the city centre offer of cinema screens does not draw the highest proportion of trips across the Study Area or from Zones 1 to 3. Instead, the two Vue cinemas at Aspects Leisure Park and Cribbs Causeway are principal cinema destinations for residents in Zones 1 to 3, alongside the Cineworld at Hengrove Leisure Park in particular for Zone 3 residents.

11.29 Table 11.6 below demonstrates the top recently visited cinemas by Zone. Of those respondents that live in the Outer Study Area (Zones 4-11), 16.4% stated they visited the authority area for Vue at Cribbs Causeway and 6.4% for Vue at Aspects Leisure Park. Only 3.8% of respondents visited cinemas outside the Study Area.

Table 11.6: Most Visited Cinema by Zone (%)

Zone	1st		2nd		3rd	
	Name	Market Share	Name	Market Share	Name	Market Share
1	Vue, Aspects Leisure Park, Longwell Green	26.0	The Orpheus Cinema, Henleaze Bristol	19.2	Showcase, Cabot Circus, Bristol	12.5
2	Vue, Cribbs Causeway, Bristol	34.3	Vue, Aspects Leisure Park, Longwell Green	32.6	Showcase, Avonmeads, St Philips Causeway, Bristol	7.6
3	Cineworld, Hengrove Leisure Park, Bristol	42.3	Vue, Aspects Leisure Park, Longwell Green	36.2	Showcase Cabot Circus, Bristol	7.9
4	Vue, Cribbs Causeway, Bristol	50.2	Curzon Cinema, Old Church Road, Clevedon	21.8	Cineworld, Weston-Super-Mare	18.7
5	Cineworld, Weston-Super-Mare	40.0	Vue, Cribbs Causeway, Bristol	18.5	The Ritz Cinema Victoria Street, Burnham-on-Sea	18.2
6	Vue, Aspects Leisure Park, Longwell Green	27.8	Wells Film Centre, Princes Road, Wells	13.8	Cineworld, Weston-Super-Mare	7.4
7	Odeon, St Stephen's Place, Trowbridge	48.2	Westway Cinema, Cork Street, Frome	21.3	Reel Cinema, Marshfield Road, Chippenham	10.3
8	Odeon, Kingsmead Leisure Complex, Bath	37.5	The Little Theatre Cinema, St. Michaels Place, Bath	30.9	Vue, Aspects Leisure Park, Longwell Green, Bristol	14.0
9	Cineworld, Riverside Retail Park, Yate, Bristol	37.6	Vue, Cribbs Causeway, Bristol	25.5	Reel Cinema, Marshfield Road, Chippenham	9.1
10	Vue, Merrywalks Centre, Stroud	86.4	Cineworld, Gloucester Quays	9.7	Cineworld, Riverside Retail Park, Yate	1.3
11	Cineworld, Spytty Road, Newport Retail Park	53.5	Vue, Cribbs Causeway, Bristol	32.0	Vue, Glyndwr Road, Cwmbran	6.7

Question 40 of NEMS Household Survey, Appendix 2

Summary and Conclusions

11.30 The commercial leisure questions included within the household questionnaire seek to establish where residents from within the Study Area are choosing to meet their leisure needs. In particular, the survey enables us to establish the draw of commercial leisure facilities within the city centre, and which facilities principally compete against these city centre destinations.

11.31 Overall, restaurants, nightclubs, theatres, museums and health and fitness clubs within the city centre are the principal destinations for residents within the Study Area, and which draw the highest proportion of trips in each case.

11.32 Bristol City Centre is the principal destination for restaurants, bars and pub trips for residents in Zones 1 to 3 and Zones 6 and 8. The city centre therefore draws the highest proportion of trips from the Bristol authority area. The city centre also draws very high proportions of theatre and concert hall trips from residents in zones 1 to 6 and 9.

11.33 In terms of cinema trips, despite the presence of the Odeon on Union Street and the Showcase Cinema deLux on Broadmead, alongside the smaller boutique offer such as The Screening Room, the city centre offer of cinema screens does not draw the highest proportion of trips across the Study Area or from Zones 1 to 3. Instead, the two Vue cinemas at Aspects Leisure Park and Cribbs Causeway are principal cinema destinations for residents in Zones 1 to 3, alongside the Cineworld at Hengrove Leisure Park in particular for Zone 3 residents.

12 Summary and Recommendations

12.1 The purpose of the Study is to assess the qualitative and quantitative needs for city centre retail and leisure development over the period to 2035; how such needs should be accommodated; and what other improvements are needed to enhance the status and performance of the city centre. The work will also encompass a wide range of stakeholder engagement and market appraisal analysis to establish how the city centre can best adapt to the commercial climate.

12.2 This section provides a summary of the key findings of the Study and seeks to provide a series of recommendations for the city centre based on the outputs from the various elements of the Study.

Key Findings: Shopping Patterns

12.3 The following provides a summary of the key findings in respect of both the comparison and convenience shopping habits identified within the household survey.

Comparison Shopping Trips

12.4 Bristol City Centre has witnessed a decline in the total level of comparison expenditure attracted to city centre destinations since the previous City Centre Study was published. As of 2012, Bristol City Centre retailers attracted a total of 17.1% of the available expenditure generated by residents in Zones 1 to 11 of the Study Area, which is 7.8 percentage points higher than the market share calculated from the 2020 household survey. The level of expenditure attracted to the Mall at Cribbs Causeway equated to 8.5% of the available expenditure from Zones 1 to 11 and the retail parks attracting 6.6% (15.1% in total to both the Mall and the retail parks) at 2012. The corresponding figure at 2020 is 16.2%, indicating the proportion of available expenditure within the Study Area attracted to the destinations at Cribbs Causeway has increased, albeit not to the same level of the decrease in the proportion of expenditure attracted to the city centre.

12.5 This is particularly apparent when we look at clothing and footwear expenditure specifically from Zones 1 to 3 residents (which broadly covers the Bristol authority area), which accounts for just under a quarter of residents' comparison spending. In this regard, there has also been a significant reduction in the level of clothing and footwear expenditure being attracted to the city centre destinations, and an increase to retailers particularly at the Mall at Cribbs Causeway.

Convenience Shopping Trips

12.6 In terms of convenience shopping trips, the principal destinations for convenience goods shopping across the Study Area as a whole are Asda on Craven Way in Longwell Green which attracts 3.3% of available expenditure, followed by Asda at Highwood Lane near Cribbs Causeway which attracts 2.1% of the total available convenience expenditure, followed by the Tesco Extra on Callington Road in Bristol which attracts 2.0% of available expenditure. In terms of city centre destinations, the principal destination is the Tesco Metro in Broadmead, followed by the Marks and Spencer foodhall also in Broadmead.

12.7 Overall, the main food retention level within Zone 1 is relatively low at 57.4%, indicating an overall lack in main food shopping provision within the centre of Bristol, which is noted as part of the city centre context provided earlier in the Study. However, the top-up convenience retention rate within Zone 1 is higher at 85.1% which indicates that the convenience provision within the city centre is serving a more top-up function for residents.

Key Findings: Retail Capacity

12.8 The capacity requirements identified in this Study are of some relevance to the determination of future planning applications. However, there is a clear need to carefully consider the impacts arising from such planning applications in accordance with the relevant policies of the NPPF and the development plan.

12.9 As identified at Section 9 of this report, once account is taken of commitments, we do not identify any short term capacity for additional comparison floorspace, and some limited capacity looking beyond 2025. By 2035, we identify a capacity of between 3,400 and 5,800 sq.m of additional comparison floorspace.

12.10 This analysis has been undertaken to date on the assumption that the city centre's market share will remain at a consistent level across the plan period. However, if it were the case that a substantial new development were to come forward in the city centre, there is the potential for there to be an increase in available expenditure to support additional floorspace. Given the current commercial climate however, it is sensible to plan for the market share to remain consistent.

12.11 On this basis, the key conclusion is that there is not a pressing need for additional retail floorspace. The priority should be to ensure that that future comparison goods retail requirements are principally directed towards Bristol City Centre in order to bring about the reoccupation or redevelopment of

vacant premises.

12.12 Should there be any additional requirement for comparison goods floorspace in practice over the longer term (above and beyond that which could be accommodated in vacant units), it will also likely be appropriate to try and ensure that the majority of this is delivered in the city centre, in accordance with 'town centre first' principles. There is a clear need to provide for the ongoing health of Bristol City Centre through improving its offer relative to that of competing destinations (most obviously Cribbs Causeway). In this regard, our Study has indicated that comparison goods retail remains of key importance to the ongoing vitality and viability of the city centre, and that in order to retain, or indeed increase the market share of the city centre back to its previous level, the existing retail stock will need to be protected where viable.

12.13 Whilst we have not identified a capacity for any additional convenience floorspace in the city centre based on a constant market share, new convenience provision would seek to meet a local consumer demand and increase the qualitative offer within the city centre, particularly in meeting main food shopping needs of residents and workers. As set out in the earlier parts of this Study, Lidl opened in the former H&M unit on Union Street subsequent to the household survey, which will assist in retaining additional convenience expenditure within the city centre.

12.14 In this regard, from a qualitative perspective, the city centre itself is lacking in a main food shopping destination. Whilst this is not entirely unusual, operators such as Aldi and Lidl are adopting a city and town centre business model format which is built around providing quick and convenient access to convenience products, and less reliance on the requirement for adjacent car parking. The provision of new foodstore provision which meets both main and top-up convenience needs within the city centre has the potential to increase the convenience market share going forward.

Key Findings: Commercial Leisure

12.15 The commercial leisure questions included within the household questionnaire seeks to establish where residents from within the Study Area are choosing to meet their leisure needs. In particular, the survey enables us to establish the draw of commercial leisure facilities within the city centre, and which facilities principally compete against these city centre destinations.

12.16 Overall, restaurants, nightclubs, theatres, museums and health and fitness clubs within the city centre are the principal destinations for residents within the Study Area, and they draw the highest proportion of trips in each case.

12.17 Bristol City Centre is the principal destination for restaurants, bars and pub trips for residents in Zones 1 to 3 and Zones 6 and 8. The city centre therefore draws the highest proportion of trips from the Bristol authority area. The city centre also draws very high proportions of theatre and concert hall trips from residents in zones 1 to 6 and 9.

12.18 In terms of cinema trips, despite the presence of the Odeon on Union Street and the Showcase Cinema deLux on Broadmead, alongside the smaller boutique offer, the city centre offer of cinema screens does not draw the highest proportion of trips across the Study Area or from Zones 1 to 3. Instead, the two Vue cinemas at Aspects Leisure Park, Longwell Green and Cribbs Causeway are principal cinema destinations for residents in Zones 1 to 3, alongside the Cineworld at Hengrove Leisure Park in particular for Zone 3 residents. There therefore may be an opportunity to enhance the city centre offer to draw trips back from out of centre destinations.

12.19 Although the city centre draws trips from the majority of the Study Area for commercial leisure uses, there are alternative out of centre facilities which compete with facilities in the city centre. However, it is clear that the restaurants, bars and pubs are key destinations for residents in the city centre, indicating that visitors are seeking a diverse offer of operators. The range of national multiple and independent operators ensures that the city centre is unique in its offer and is clearly still a key attractor for residents and visitors alike. Building on this commercial leisure offer further will assist in diversifying the offer of the city centre and provide facilities for residents and students residing in the local area. There may also be further opportunities to encourage additional unique commercial operators which meet both the family and adult market, and which provide facilities to draw visitors into the city centre.

Key Findings: Property Market Overview

Retail Summary

12.20 As discussed in the market overview, the Covid-19 pandemic has accelerated the downturn in the retail sector. This is highlighted by data from the Centre for Retail Research, which shows that the number of retail stores going into administration in the first half of 2020 is already above last year's total. Further to this, the Deloitte Consumer Tracker hit a record low in the first quarter of 2020, as the impact of COVID-19 unfolded in the UK.

12.21 The Bristol Shopping Quarter (Broadmead, The Galleries and Cabot Circus) forms the core high street retail offer where the majority of national multiples are located. Other important shopping areas

including Park Street/Queens Road, Old City, Stokes Croft, Old Market and Christmas Steps/Colston Street.

12.22 With the closure of Debenhams and some operators relocating from other parts of the city centre to Cabots Circus, along with the closure of the M&S, the result is a number of larger floorplates remaining vacant elsewhere in the city centre at a difficult time. However, one such example of repurposing and reusing large vacant floorplates is 'Sparks', which has come forward in the former M&S unit and is defined as a 'department store with a difference', providing space to support people in Bristol to take actions on climate, equality and wellbeing.

12.23 However, a recent news article in 'Business Live' (November 2023) states that plans have been unveiled for the formed Debenhams store, to bring forward more than 500 new homes within the city centre. It is understood that residential and office uses are being considered, subject to planning.

Leisure Summary

12.24 As discussed above the Covid-19 lockdown has severely suppressed leisure spending, by removing virtually all opportunities to spend outside the home and forcing consumers to favour in-home leisure activities.

12.25 Bristol's F & B offering is split largely between the Bristol Shopping Quarter which is primarily home to the larger national multiples, although these do have a presence across the city. Our market research also identified a number of local or independent operators taking space on a leasehold basis located on Park Street and Stokes Croft.

12.26 This suggests the city's F & B offer is growing and diversifying and this is a trend consistent with the wider F & B market which has occurred alongside traditional A1 uses closing as discussed in the market overview section. However, the sustainability of this growth has started to be question with a number of casualties within the F & B sector (as discussed earlier).

12.27 In terms of hotels, this is a difficult market to analyse specifically at a city level. PwC predicted that the UK hotel trading performance is set to decline significantly in 2021 due to the impact of the COVID-19 pandemic. Currently, Bristol's hotel offer is comprised of traditional / independent, budget and serviced apartments. However, there is a lack of luxury hotel accommodation in Bristol City Centre as such operators tend to focus on key cities with both a substantial tourist attraction, but also a strong office market. Were the city to see a growth in its tourism and leisure offer, as well as more office-led development then this is a potential market to be exploited.

12.28 Arguably the most important form of leisure space is what we have referenced as 'urban leisure'. With consumer spending patterns changing to focus more on experiences than physical items, there has been a growth within this market and Bristol itself has seen a number of new urban leisure operators moved in such as:

- Multiple Escape Rooms
- Jungle Rumble Adventure Golf – Cabot Circus

Residential Summary

12.29 We have undertaken a high-level review of the city centre residential market utilising Land Registry, Rightmove and Zoopla.

12.30 We have identified the Wapping Wharf development located within the Bristol Central Area which currently (January 2021) has a range of new build apartments on the market. Asking prices range between £257,500 and £282,500 for one-bedroom apartments, between £362,500 and £390,000 for two-bedroom apartments and between £550,000 and £595,000 for three-bedroom apartments.

12.31 Further to this, we identified two schemes where apartments have been sold within the past two years (2018 – 2020). Brandon Yard located along the northern section of Bristol's Harbourside, lying opposite Brunel's SS Great Britain and New Yard on the site of the former Bristol General Hospital.

12.32 We have also reviewed rental values for newer one- and two-bedroom apartments in Bristol City Centre. Rental values for one bedroom apartments range between £950 - £1,025 pcm and for two-bedroom apartments between £1,250 - £1,435 pcm.

12.33 We are aware of a number of schemes in the pipeline across the city centre, including three private rented sector schemes. This is a growing sector nationwide, and as highlighted can overcome issues with viability where these is investor demand for a large number of units.

12.34 We consider that encouraging residential development within and around the city centre is important to the future growth and sustainability of Bristol because increasing the population density within the city will help in generating footfall and demand within the centre for retail and leisure uses. It will enable the evening economy to become more sustainable and add vibrancy into the evening.

Key Findings: Survey Summary

12.35 The market research undertaken and summarised above has provided a range of outputs which will assist in the overarching recommendations for the city centre later in this Study. We summarise the key findings from each element below.

In-Street Survey

12.36 The in-street survey, which was conducted within the city centre at various locations and at various times throughout the week, indicates that the principal purpose for visiting the city centre is to visit retail destinations.

12.37 The survey also demonstrates that there were a proportion of visitors who when visiting the city centre to shop, were also linking their trips with a visit to the pubs, cafes or restaurants. When visiting for non-food retail purposes, the principal destination visited was Broadmead, followed by Cabot Circus, with a further quarter of the respondents generally stating 'the city centre'. The results therefore clearly indicate that retailing is still the principal purpose for visiting the city centre.

12.38 The highest proportion of visitors travel to the city centre by bus or metro, followed by travelling by car or other private vehicle. The high proportion of visitors traveling by public transport or walking into the city indicates that the accessibility of the city centre is good, and that there is also a good local walk-in catchment which the city centre operators benefit from. This also corresponds with our analysis in respect of the overall accessibility of the city centre set out earlier in the Study.

12.39 In terms of the qualitative questions, and an attempt to understand what visitors liked and disliked about the city centre and what they thought could be done to improve the city centre, the answers were mixed. In terms of the positives of the city centre, respondents stated that they like the range of shops and markets and the range of places to eat. However, when asked what they disliked, issues such as the cleanliness of the city centre and number of beggars or homeless people were listed. The range of shops and cleanliness of the city centre were also picked up by respondents in identifying how the city centre could be improved.

12.40 In terms of other centres visited, just over a quarter of respondents stated that they also visit Cribbs Causeway frequently.

Stakeholder Survey

12.41 Given the importance of understanding the views of the key stakeholders involved in the success (both current and future) of the city centre, we also undertook a stakeholder survey. The survey asked

stakeholders in respect of their views of the strengths and weaknesses of the centre, and where they saw the city centre progressing in the short, medium and long term. Stakeholders included key landowners, local, regional and national agents, representatives of businesses and other leaders in local groups.

12.42 Stakeholders identified that the current principal strengths of the city centre is the food and drink offer, followed by the cultural offer and shopping facilities.

12.43 Importantly, stakeholders were asked what they would like to see in the city centre over the next five to ten years. Key suggestions and aspirations for stakeholders include:

- A higher proportion of independent retailers;
- More cultural events for a broad audience and more temporary exhibition and events;
- More affordable and flexible office space;
- A higher proportion of affordable residential properties within the city centre;
- Better public transport options and pedestrianisation within the city centre;
- A wider offer of community spaces and events; and
- More green spaces and an enhanced public realm.

12.44 In addition to the above, stakeholders also provided their views on what could be done to help further underpin the retail and leisure activity within the city centre. Key improvements identified by the stakeholders include:

- Diversification of the leisure offer;
- Pedestrianisation of the city centre;
- Better transport accessibility;
- More financial support to the sector; and
- An increased residential population in the city centre.

Business Survey

12.45 We have also analysed the responses to the Business Survey commissioned by Bristol Council which was carried out in the latter stages of 2021. The analysis focuses on the key questions which relate to

the independent sector within the city centre and what could be done to improve trading opportunities for this sector.

12.46 We have identified a number of overarching themes which are summarised below:

- Public realm improvements relating to pedestrianisation, cleaner streets and making the environment more welcoming and inclusive.
- Transport and highways improvements relating to including implementing traffic restrictions to reduce traffic. Comments were also made in relation to street closures as a means of making space for outdoor markets.
- Lower business rates and rents to provide incentives to independent businesses as well as reducing the number of vacant buildings in the city centre.
- Covered areas / market for outdoor trading. No specific locations were provided. Specific responses included;
    - Temporary marquee / gazebos could be set up for traders
    - Introduction of Bristol City Centre farmers markets to encourage lower food miles, education drives about local food.
    - Alfresco covered dining facilities for bars and restaurants.

12.47 In terms of independent trading, Question 20 of the business survey specifically asked respondents to consider what support is needed to encourage independent business to take on city centre / high street premises. Key themes which emerged from this included; lower business rates and rents for independent businesses; flexible leases (length) and turnover rents; financial support through incentives, grants (Government Funding?); and, wider public realm and transport improvements.

12.48 Vacant units are clearly an opportunity to improve the retail and wider offer within the town centre. Careful consideration should be given to how this space can be used and what incentives could be offered to businesses looking for space.

Survey of Market Operators

12.49 In addition to the above, a separate online survey was also issued to the five market operators within the city centre, to gather views on the trading characteristics and to determine how the markets are performing post Covid.

12.50 It is clear that the markets within the city centre vary in size, nature and overall quality. Of the four market operators and managers who responded, three stated that the most common nature of goods and services on offer was street food, with drinks to go. The food and drink offer of the markets is therefore a principal offer, alongside a wider more traditional convenience and comparison offer often found within markets.

12.51 The respondents were asked to describe the general trading characteristics within the market prior to the lockdowns associated with the Covid-19 pandemic. Respondents noted a strong level of footfall, generated by a mix of local residents, office workers, students and tourists. The markets were used for socialising and meeting, alongside a strong range of buyers and low vacancy levels. Furthermore, seasonal trends were noted with a high level of footfall at Christmas noted by one operator.

12.52 All four respondents reported that there were current plans to enhance the offer or overall environment within the market. These changes include renovations to the furniture and signage of markets, an increase in the seating areas and covered units for traders, introducing more food and drink producers to the market, improving the quality and appearance of the individual traders pitches, reviewing layouts and reducing carbon footprint and giving greater consideration to sustainability issues.

12.53 Respondents were also asked to give their view on where they saw the market being in approximately five years. Views included increased awareness of the market amongst local customers, further investment in the fabric of market buildings and plans to grow market offer at different times of the day and throughout the city centre. However, although the need to ensure cleaner air was recognised, there were concerns around the impacts a Clean Air Zone may have on individual traders.

Key Findings: Comparator City Analysis

12.54 An additional element of the study focused on a comparison of how Bristol functions when compared to other key cities across the country. The comparator cities have been selected based on a broad range of factors including location and size of the city. These four cities are Cardiff, Exeter, Leeds and Southampton.

12.55 The analysis of the four comparator cities has focused on the following key indicators:

- Overview and Key Indicators

- Our analysis of net absorption identified that three of the cities (Bristol, Cardiff and Leeds) all experienced a negative net absorption indicating that more retail space was vacated and placed on the market than was leased. Exeter and Southampton on the other hand experienced a positive net absorption indicating that demand for retail space in these cities increased during the review period.

- Net Internal Area
  - AspinallVerdi's analysis reviewed the total Net Internal Area of retail space in each of the five cities. This analysis identified Leeds as having more than 20m sq.ft of retail followed by Bristol with 15m sq.ft of retail. Exeter had the lowest amount of the retail space at just over 6m sq.ft.

- Vacancy Rates
  - In terms of vacancy rates, AspinallVerdi's analysis identified that for shopping centres the rate was highest in Exeter. For retail parks, the rate was highest in Leeds and for general retail, the rate was similar across four out of the five cities. With the ongoing Covid Pandemic it is possible that more units will become vacant.

- Market Rents and Yields
  - Rental values across the five cities were similar in relation to retail parks and general retail, ranging between £16 psf and £25 psf.
  - In terms of shopping centre rents, there was a greater variance across the five cities, the highest being Southampton at £56 psf and the lowest being for Cardiff at £24 psf.
  - In respect of market yields, AspinallVerdi analysed evidence based on transactions which have occurred each year since 2009 in each of the five cities. For general retail yields ranged between 6% and 7.5% during the time period. Between 2014 and 2018 Yields were generally hardening to around 6% and 6.75%. During 2019 Yields began to soften and in all cities apart from Leeds (which levelled off at 7%) have continued to do so. In all cities Yields for general retail are expected to continue to soften into 2022 before levelling off.

- Availability Rate
  - This is calculated by dividing the total available sq.ft with the total existing floorspace.

- For shopping centres, the availability Rate is highest in Southampton at 4.8%.
- For retail parks, the availability Rate is highest in Leeds at 6.2%.
- For general retail, the availability Rate is highest in Cardiff 7.10%.

Recommendations for the City Centre

12.56 As we set out in the introductory section of this Study, in terms of physical regeneration, the city centre has seen significant economic and population growth over the last 15 years. There are also a number of major transport, public space and development projects being planned for delivery over the next 5-15 years.

12.57 The projects are focused around Broadmead, St James Barton Roundabout, Castle Park and the Old City. These developments will be informed by the City Centre Framework, which includes the following objectives:

- Creating a liveable, vibrant, safe and inclusive city centre for the benefit of people of all ages to live, work, learn and enjoy, both during the day and night;
- Tackling traffic congestion and improving air quality;
- Making the city centre better connected, accessible and healthier;
- Supporting the city centre as the core retail, leisure and cultural heart of the region, by enabling regeneration, diversifying uses and promoting the offer; and
- Ensuring the sustainable development of new homes, employment space, enhancement of heritage assets, streets and public open spaces; contributing to a carbon neutral and climate resilient city.

12.58 The draft City Centre Development and Delivery Plan has now been published for consultation, which builds on the Bristol One City Plan and the Bristol City Centre Framework. The Plan will guide on the recovery, regeneration and transformation of the city centre, setting out a vision and high-level principles to guide regeneration. These focus particularly on the Broadmead and Castle Park areas, helping to transform them into more inclusive, sustainable and connected places, and create a green, safe and vibrant city centre.

12.59 One of the key aspects of the city centre remains and is a key driver of footfall into the regional destination, is its retail and leisure offer. As such, despite the implications of the pandemic and wider commercial market factors, ensuring that this offer remains the principal use within the centre, and

that the Council seeks to plan for the future success of the retail and leisure market, is key to its future success. This includes the future protection of the city centre market share, ensuring that out of centre competing destinations do not continue to erode this market share to the potential detriment to the overall offer.

12.60 The findings of this Study therefore fully support the overarching aspirations as set out within the City Centre Framework, and further justify the need to ensure that the city centre's offer and associated draw is not further eroded by competing destinations, not least at Cribbs Causeway. Although this is just one of a number of out of centre destinations which inevitably has drawn trade and associated footfall away from the city centre over the past decade, alongside the implications associated with the pandemic, there is a further strain on the city centre to ensure that footfall is retained and even pulled back to help support the future vitality and viability.

12.61 The strategy for Bristol City Centre should be focused around fostering quality and encouraging diversity of land use and economic activity. This should include encouraging diversification in the retail sector but also through the provision of new homes, opportunities for new job creation and enhancements to the public realm, accessibility and sustainability.

12.62 In terms of planning policy and management, the Council should encourage the provision of homes and jobs in the city centre.

12.63 In addition, consideration should be given to securing new convenience goods shopping floorspace which could meet main food shopping trips within the city centre and the areas around the city centre.

12.64 While consumers were forced to adopt and adapt to online retail during the pandemic, the two worlds have perhaps merged now as part of our natural shopping behaviour. Consumers however still like to experience products in the flesh to feel confident they're making the right choice. Shopping is also a social pastime. Brands have recognised this, so the need for physical retail spaces which might double as interactive showrooms, will remain and evolve as more brands embrace the advantages of 'merged' retail. There is therefore a need to retain retail floorspace and the offer within the city centre in order to drive footfall and retain expenditure. This will in turn help to support the wider offer in the city centre and provide an offer to meet local needs.

12.65 However, a key finding from this study is that it's not only the authority's residents which need to be encouraged back into the city centre, but that those living in areas outside of the authority area who

perhaps used to look to the city centre to meet their retail and leisure needs also need to be drawn back.

12.66 In this regard and based on a constant market share as identified in this Study, the findings of the capacity assessment do not identify any short, medium or long term need for additional comparison or convenience floorspace within the city centre.

12.67 The capacity assessment assumes however that the market share will remain consistent over the plan period and does not therefore plan for the potential to increase the city centre's market share. One of the principal ways of increasing the market share is through a large redevelopment scheme which will bring expenditure back into the city centre.

12.68 Therefore, whilst the capacity assessment identifies a deficit in terms of floorspace capacity, we do not consider this automatically equates to the requirement to retract retail floorspace considerably. Instead, there is a real requirement to ensure that the offer remains diverse, provides attractors to draw shoppers in which is of a qualitatively different offer to Cribbs Causeway (and other out of centre destinations). This may be achieved through a diversification of the leisure and business offer, as well as the increase in residential properties in the centre. There is a further opportunity to encourage additional formal and informal community events which cannot be replicated at out of centre destinations. It is this wider offer and opportunity to provide a centre which is focused on the community, alongside both the daytime and nighttime economy which is unique to the city centre and which draws visitors in.

12.69 Bristol is a positive example of how Councils need to embrace the needs of their local communities and engage with stakeholders in planning for the future success of the city centre. In this regard, tailored multi-use communal spaces may be an opportunity for some of the vacant floorspace within the city centre. The extensive stakeholder engagement already undertaken by the authority is helping to guide the future of the city centre, defining not only what is viable but what residents and business want and need within the city.

12.70 Furthermore, there is a real opportunity through the regeneration of key sites within the city centre to bring a variety of main town centre uses and encourage activity throughout the day and evening. The regeneration schemes may include residential uses but will need to consider how they can assist in enhancing the wider public realm and accessibility links across the city centre.

12.71 In this regard, one of the most popular uses for revived department store spaces in 2021 was for housing, with the majority of residential conversions elsewhere in the country also incorporating a mix of retail at street level. As we set out earlier in this section, it is understood that a similar scheme for the former Debenhams will be forthcoming.

12.72 In terms of the key themes running through the stakeholder consultation, business and residents surveys, there is a real desire and aspiration to diversify the offer of the city centre through the provision of a wider choice of homes, flexible office and workspace and the overarching enhancement of the public realm, including ensuring there is less dominance from traffic within the city centre.

12.73 We provide below a series of key recommendations against six key themes.

- **Placemaking & Public Realm** – one of the aspects that we would encourage the Council to consider is investment into the public realm of the City Centre. This was a key finding in our analysis of the survey results, and particularly which was drawn out of the stakeholder surveys and business surveys of the independent sector. Investment in the public realm in terms of activation and quality are key to visitor experience and this would form part of a response to attract more operators and visitors. High quality wayfinding, pedestrian and cycling linkages could also contribute to connecting the various quarters of the City Centre more effectively. For example, links between the Harbourside, office quarters and city centre could be enhanced.

- **Diversifying the leisure offer** – for centres to thrive they need to fulfil several roles to attract the diversity and numbers of visitors. Uses such as gyms, entertainment centres, escape rooms, bars, restaurants and other complementary amenities within the city centre would increase both the breadth of the type of visitor as well as the time expended within the city centre and would therefore contribute to the local economy. This is particularly important to attract younger people and families. Cultural facilities are also important in this context. The city centre provides for a range of existing leisure and cultural facilities which can be built on moving forward.

- **Multi-use large floorplates and buildings** – in the past large department stores were made up of concessions which brought different brands and offers together; moving forwards operators are emerging which bring a range of different uses including retail, leisure and workspace uses in to larger spaces such as vacant department stores. This is in its infancy and clearly will be dependent on both the property owner and any operator coming together to deliver such

schemes. The Council may choose to explore this approach to some of the larger vacant buildings with owners.

- **Residential** – the emerging build to rent and student accommodation sectors could be an opportunity in appropriate locations to bring people into the city centre and to drive footfall and patronage to the retail and leisure sector. The project team's market research identified a number of build to rent schemes in the pipeline along with new build flatted developments located along the Harbourside. Ensuring active frontages and that prospective conflicts are minimised will be important.

- **Independent retailing** – as larger national multiples consolidate; new operators will come forward. Landlords are increasingly looking to work with operators such that attractive terms can be agreed, but which are sustainable – this includes turnover leases and shorter terms too. This was identified in the analysis of the independent sector business survey.

- **Events** – successful centres are increasingly using public realm/centres to host events and thus attract visitors, examples include Christmas markets, fairs, festivals (food/literature), specialist markets, light nights, art and other displays. These are often brought forward by a Business Improvement District partnership who act as the organisers and promotors of the events. The aim is to increase patronage and to create peaks such that the traders in the centre can benefit.

- **Use of vacant space** – vacant space provides an opportunity for the local authority to consider how this space can be best used to accommodate not only the residents but also visitor needs. This topic formed one of the questions in the business survey, the responses covered a range of ideas which is summarised in Section 5 of this report and set out in detail in Appendix 3. Ideas ranged from converting space for art, leisure and culture uses to creating residential accommodation including social housing. One such example is 'Sparks' which has come forward in the former M&S unit and is defined as a 'department store with a difference', providing space to support people in Bristol to take actions on climate, equality and wellbeing. Further consideration of how best to use these spaces is critical in order to enhance the vitality and vibrancy of a place.

Appendix 1: Study Area Plan

Appendix 2: Household Survey Results

Appendix 3: Property Market Report – Aspinall Verdi

Appendix 4: In-Street Survey Results

Appendix 5: Stakeholder Survey Results

Appendix 6: Comparison Cities Analysis

Appendix 7: Quantitative Capacity Tables

Appendix 8: 2022 Quantitative Capacity Tables and Summary

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