South Gloucestershire Council

TOWN CENTRES AND RETAIL STUDY

Final Report: Volume 1
April 2010
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INTRODUCTION

1.1 South Gloucestershire Council commissioned Roger Tym & Partners to undertake this Town Centres and Retail Study, which forms an evidence base to guide retail planning and policy for the Council’s Local Development Framework. The broad requirements of the study were to establish the scope and likely future investment required for retail and leisure provision in South Gloucestershire’s town centres, including exploration of new opportunities. In addition, the study identifies how retail need can be met in line with the Council’s spatial objectives which includes housing and population growth and the possibility of urban extensions. The study has a forward horizon to 2026.

1.2 The study objectives are as follows:

- Healthcheck assessment of vitality and viability for the ten major and minor town centres in South Gloucestershire: Kingswood, Yate, Thornbury, Chipping Sodbury, Downend, Hanham, Staple Hill, Emersons Green, Bradley Stoke and Filton
- Assessment of resident shopping patterns to clarify the level of demand within the catchment by means of a telephone survey of households
- Assessing future changes in the current position, taking account of:
  - Population changes, including the possibility of new communities
  - Forecast changes in retail expenditure
  - Changes in forms of retail
  - Possible increases or decreases in trade draw for the study catchment
- Assessment of scope for additional retail provision and how this can be accommodated within South Gloucestershire in the most appropriate format and locations
- Define a network and hierarchy of centres which most effectively serve the needs of the catchment, both now and in the future.

1.3 The brief for this study set out that the role and catchment of the regional shopping centre at The Mall/Cribbs Causeway should not be assessed, however consideration is given in relation to the impact it has on the town centres and the current spending patterns of residents.

1.4 The study reflects the Government’s requirements for town centre and retail planning, as set out in PPS4 and PPS12, which are discussed in Section 2 of our report.

1.5 As part of the study, a seminar was held for interested parties to disseminate the findings of the surveys and, by way of workshops, to focus on the issues and opportunities facing the various town centres. Following the seminar, attendees were invited to comment on the healthcheck assessments. The notes from the workshops are at Appendix 3. Where appropriate, the comments and workshop notes have been incorporated into this report. However, many of the comments and notes made fall outside the scope of this study but will be taken account of by South Gloucestershire Council in preparing their Core Strategy.
Retail Context

1.6 The past two decades have seen a significant change in the role and function for town centres in South Gloucestershire, largely due to economic and urban growth, new forms of retailing and more dispersed activity across the district. The regional shopping centre, The Mall and associated retail park at Cribbs Causeway is well established as an out of town destination, primarily for comparison goods but also for convenience food shopping. There are also retail parks at Longwell Green and Abbeywood. These retail parks attract a major share of comparison goods expenditure from the study area’s residents and in the case of The Mall/Cribbs Causeway a much wider catchment is attained, including residents of Bristol, Gloucestershire, Somerset and South Wales. The major quantum of leisure facilities is also located at Cribbs Causeway and Longwell Green.

1.7 A new town centre for Bradley Stoke at Willow Brook now provides a Tesco Extra store of approximately 27,000 sq.m, a shopping mall of approximately 3,000 sq.m and further retail units of approximately 8,000 sq.m, as well as office space and community and leisure services, clustered around a town square. The impact of the new retail outlets at Bradley Stoke on shopping patterns will take time to become established.

1.8 A major extension to Bristol City Centre was opened in autumn 2008. Cabot Circus, an extension to the Broadmead shopping area, features an additional 92,900 sq.m retail floorspace in 120 stores, a 13-screen cinema, food and drink outlets, a 150-bed hotel and offices space. Whilst it will not be possible to assess the actual impact of this increase in floorspace, it will need to be taken into account in assessing future needs within South Gloucestershire.

1.9 Thus the established town centres accommodate around 30 per cent of the district’s total retail floorspace, with 50 per cent being located in the retail parks - 25 per cent is at The Mall/Cribbs Causeway. The traditional town centres have seen a decline in the proportion of shop frontages in retail use, with an increase in non-retail uses such as cafes, take-aways, and building societies etc. The role of the town centres has become more focused upon meeting day to day convenience needs with comparison shopping comprising more of amenity goods, such as chemist items, household hardware, so on and so forth. Higher order material goods tend to be purchased at the out of centre retail parks.

1.10 Over the past 20 years, retail expenditure has polarized towards the out-of-town retail parks and freestanding stores, a pattern experienced in many locations across the UK. There is increasing pressure from retail operators to enhance the retail provision at retail parks, including convenience goods and a wider range of comparison goods which will further the competition gap with the district’s town centres.

1.11 There is a need to redefine the role and increase the competitiveness of the town centres to ensure they retain strong local support and maintain viability and vitality. This strategic study has largely focused on managing the pressures from major institutional investment in retail and other town centre facilities. At a local level there is also a need to encourage local retailers and niche markets which will help to give centres a unique retail offer/character and which is required for their long-term health and vitality.
2 POLICY REVIEW

2.1 The following chapter details the policy context within which this study is set.

PPS12

2.2 PPS12 introduces a “test of soundness” for the development of the Council’s Local Development Framework, in particular the Core Strategy Development Plan Document. The “test of soundness” is as follows:

- To be “sound” a core strategy should be justified, effective and consistent with national policy
- “Justified” means that the document must be: founded on a robust and credible evidence base the most appropriate strategy when considered against reasonable alternatives
- “Effective” means that the document must be: deliverable, flexible and able to be monitored.”

PPS4


2.4 The Government’s objective as set out in PPS4 is to achieve sustainable economic growth by:

- Building prosperous communities by improving the economic performance of cities, towns, regions, sub regions and local areas
- Reducing the gap in economic growth rates between regions, promoting regeneration and tackling deprivation
- Delivering more sustainable patterns of development
- Promoting the vitality and viability of town and other centres as important places for communities
- Raising the quality of life and the environment in rural areas by promoting thriving, inclusive and locally distinctive rural communities

2.5 Policies EC3 to EC5 are plan making policies regarding town and other centres. Regional Planning Bodies (RPBs) and Local Planning Authorities (LPAs) are required to:

- Set out a strategy for the management and growth of centres over the plan period
- Promote competitive town centre environments and provide consumer choice
- Identify a range of sites to accommodate identified need
- Define a network and hierarchy of centres that is resilient to future economic changes and which meets the needs of their catchments.
Practice guidance

2.6 Planning for town centres: practice guidance on need, impact and the sequential approach was published in December 2009 alongside PPS4. It supports the implementation of national policy, but does not set out new policy. The main objectives of the Practice Guidance are:

- To promote development in Town Centres.
- To provide advice on preparing need and impact assessments and assist in determining planning applications.
- To illustrate how sequential approach can be applied.
- To encourage a greater degree of consistency and transparency to assist in preparation of need and impact assessments.

2.7 The Practice Guidance states that consideration of need, sequential site assessments and impact assessments should be undertaken regionally to inform the RSS and locally to prepare the LDF. It recognises the importance of identifying need, both quantitative and qualitative. Throughout this study we have taken into account the principles set out in the Practice Guidance.

Competition Commission’s Investigation of the UK Grocery Market

2.8 The Competition Commission published the findings of its investigation of the UK grocery market in April 2008. The Commission’s key recommendations are that:

The Department of Communities and Local Government (CLG) should take such steps as are necessary to make the Office of Fair Trading (OFT) a statutory consultee for all applications for grocery stores in excess of 1,000 Sqm sales area (including applications for extensions which would cause the post-implementation sales area to exceed 1,000 Sqm).

2.9 The OFT should provide advice to the LPA on whether a particular retailer has passed or failed a ‘competition test’. A grocery retailer would fail the test if:

- It was not a new entrant to the local area (defined by a ten minute drive time); and
- The total number of fascias in the local area were three or fewer; and
- The retailer would have 60 per cent or more of the groceries sales area in the local area.

2.10 However, Tesco asked for a judicial review over the test drawn up by the Competition Commission. The appeal was overruled in March 2009 by the Competition Appeal Tribunal (CAT). Mr Justice Barling, Head of The CAT, explained ‘The CC failed properly to consider certain matters which were relevant to its recommendation that the competition test be imposed. None of the matters in question could be dismissed as incapable of affecting the commission’s recommendation.’

2.11 As things stand, there is no competition test per se within Government guidance. However, the principles of competition are important and are already recognised within PPS4. Thus in preparing this study, careful consideration is given to how competition can be improved within the District.
The Requirements of the Current and Emerging Regional and Sub Regional Policy

Regional Planning Guidance 10

2.12 The current Regional Spatial Strategy is Regional Planning Guidance 10 (RPG10) published in 2001. It provides a broad development strategy for the South West Region up to 2016. RPG10 presents a vision and 12 key objectives which include improving economic competitiveness; promoting economic development in locations where it can best contribute to meeting local needs; addressing variations in prosperity through regeneration, meeting people’s requirements for jobs and facilities; and improving accessibility. They are based around national sustainability objectives and are generalised in nature and as such are of limited benefit to the local-level policy approach.

2.13 RPG10 presents a number of policies pertinent to retail and town centre uses in South Gloucestershire, which is classified within the Bristol Area Sub-Region. In particular, the RPG acknowledges the Bristol Area as a key location for investment, which cannot be easily replicated elsewhere in the region.

2.14 In particular Policy EC6: Town Centres and Retailing outlines a range of more specific provisions in relation to Town Centres and the location of retail development. The policy advises that LPAs should:

- Locate larger retail, leisure, commercial and public facilities in the centres of the Primary Urban Areas and in other designated centres for growth specified in the spatial strategy;
- Encourage developments of an appropriate scale in the market towns and larger settlements;
- Ensure that such development is located where it will contribute to the regeneration and environmental improvement of Town Centres;
- Ensure the protection of the vitality and viability of existing centres, including suburban centres;
- Make no further provision for proposals to build and extend major regional and sub-regional out of town shopping centres and
- Ensure that development is located where it can help to reduce the need to travel, encourage journeys by modes other than the private car.

Emerging Regional Spatial Strategy for the South West

2.15 The Regional Spatial Strategy (RSS) will provide planning guidance for the South West for the period up to 2026. Its aim is to manage the change and development in the South West that will be needed to support a growing population and economy. The RSS will inform and guide the spatial planning policy for Local Development Frameworks (LDFs).

2.16 The Proposed Changes to the RSS published by the Secretary of State in July 2008 promotes the development of 32,800 dwellings in South Gloucestershire in the period to 2026. The location of development is to concentrate on the greater Bristol urban area together with two proposed urban extensions (the M32 corridor and East of Kingswood areas) and an urban extension to Yate/Chipping Sodbury.
However, a recent legal challenge to the South East Regional Spatial Strategy has led to further reviews of the RSS in the South East and the South West, with publication delayed until 2010. Such delays raise questions about the likelihood of the document’s implementation in light of an upcoming general election. In consequence there is uncertainty over the future policy framework for the District.

South Gloucestershire Local Plan and Emerging LDF

South Gloucestershire’s Local Plan was adopted in 2006. As part of the changes outlined in the Planning and Compulsory Purchase Act 2004 Local Plans are to be replaced by Local Development Frameworks. During the transitory period it has been agreed with the Secretary of State that certain policies are ‘saved’ and so still relevant to the planning process.

All twelve of the Local Plan policies in relation to town centres and retailing have been saved until they are replaced by forthcoming Local Development Plan Documents, such as the Core Strategy.

South Gloucestershire published its Issues and Options for Consultation between May and June 2008 in respect of its emerging Core Strategy. This study will form a crucial piece of evidence in relation to the development of the Preferred Options for the Core Strategy, which are due to be published for consultation in early 2010.
3 ASSESSMENT OF TOWN CENTRE PERFORMANCE

Performance Analysis - the PPS4 Indicators

3.1 The starting point for this study is to establish how existing centres are performing at present and the pressures for change which they face. This analysis is in part based on the existing hierarchy as set out in established policy. PPS4 defines centres as either City, Town, District or Local supplemented by small parades of shops. Reference is also made to Retail Parks and Regional Shopping Centres which fall outside of the retail hierarchy.

3.2 The current hierarchy of centres in South Gloucestershire is defined in the Structure Plan and at Figure 9.1 of the South Gloucestershire Local Plan as follows:

- City Centres - None within the South Gloucestershire
- Town Centres - (major): Emersons Green, Kingswood, Staple Hill, Thornbury, Yate and the emerging centre at Bradley Stoke. (minor): Chipping Sodbury, Downend, Hanham and Filton
- Regional Shopping Centre - The Mall at Cribbs Causeway
- Retail parks - Cribbs Causeway, Abbeywood, Longwell Green
- Free Standing Stores - e.g. Asda at Longwell Green and Cribbs Causeway, B&Q and Sainsbury's at Stoke Gifford.

3.3 In general terms the aim of policy is to consolidate City, Town, District and Local Centres - but South Gloucestershire has a very large amount of retail floorspace outside of these centres which affects their vitality and viability.

3.4 The analysis of the performance of South Gloucestershire town centres, (namely Thornbury, Yate, Kingswood, Chipping Sodbury, Filton, Bradley Stoke, Emerson Green, Staple Hill, Hanham and Downend), has involved an appraisal of each centre in relation to the key indicators of vitality and viability, as identified in Annex D of PPS4. Thus, appraisal of each centre has involved:

- on-foot surveys;
- desk research, so as to benchmark the study centres against a range of comparator centres; and
- consultations with key agents operating in the South Gloucestershire area.

3.5 In each centre we undertake a performance assessment using the Local Plan-defined primary and secondary frontages of each of the centre. However it is worth noting that some of the performance assessment data is sourced from third party information (for example, Experian Goad), and the boundaries of the centres used in these assessments may not...
correlate fully with the Local Plan-defined frontages. It is also worth stating that given the small nature of the centres in the District, the amount of published data which is used to inform the performance assessment is limited. We have thus supported the published information with qualitative assessments of each centre, and, where appropriate, discussions with local stakeholders.

3.6 The analysis for each centre is based on detailed data set out at Appendix 2. This analysis is based on site visits and data available at a point in time (November 2008). While detailed circumstances may have changed subsequently the authors are confident that, on the basis of subsequent visits and monitoring, the key conclusions for each centre remain broadly valid and appropriate to a strategic study. Short summaries of the town centres are presented here in the main report with more detailed sections in Appendix 1.

Major changes which have occurred since the initial analysis include:

- Opening of Marks and Spencer at Longwell Green
- Completion of the Willow Brook Centre at Bradley Stoke
- Refusal of planning permission for a proposed Tesco Store at Hanham (SGC Planning Committee 10th December 2009)
- Cabot Circus in Bristol City Centre has opened during the course of the study and while the survey of spending patterns reflects this, trading patterns are still becoming established
- Planning permission for an extension to Asda at Longwell Green and to Sainsbury’s at Fox Den Road, Stoke Gifford.

**Thornbury Town Centre Healthcheck Summary**

3.7 Thornbury (defined as a Town Centre) retains a relatively vibrant and well supported town centre although at the time of the survey (November 2008) there was a very high vacancy rate at 40 per cent above the national average. This is affecting the proportional share of other uses within the town centre especially comparison shopping which is 20 per cent below the UK average in terms of units. It is unclear whether this is related to competition from larger centres, national recession or purely local factors such as lease arrangements.

3.8 In particular the town has fewer clothing retailers than would be expected for a town centre of its size, which can be important drivers of footfall in a centre. Correspondingly the centre is more highly represented with services uses, especially banks and financial services, building societies and estate agents. This is common in many small towns and market towns, which will always struggle to compete with the comparison offer of the larger towns, cities and retail parks. Such centres are increasingly becoming more service orientated which is not an undue concern, as this provides them with an attraction and use which is not always found in the main comparison shopping centres.

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2 A full list of local stakeholders consulted is provided at Appendix 2.
3.9 Demand from retailers both national and independent is presently low, although it should be possible to improve the vacancy rate. While Thornbury has a wide rural catchment this overlaps with Cribbs Causeway and it has to compete for shoppers and investment. One of the main drawbacks is the predominance of small units which may deter comparison retailers, especially multiples. However with so few opportunities to expand the town centre, independent traders will benefit from only limited competition from national multiples. Although lack of interest from multiples may reflect a weakness in the centre it also provides opportunities for independent retailers, which, together with the growing catering offer, is a potential strength and unique selling point.

3.10 Thornbury’s Town Centre Strategy Group is looking to address these issues and promote the town.

3.11 The town centre is clean, tidy, and attractive and maintains the features of its market town heritage. There is a good balance between pedestrians and car borne traffic and the presence of large, free car parks is likely to benefit the vitality of the centre.

Yate Town Centre Healthcheck Summary

3.12 In summary Yate (defined as a Town Centre) has a vibrant town centre with evidence for healthy trading and strong local patronage. It is important to note that the form and role of Yate is likely to be influenced by the retail offer of nearby Chipping Sodbury, where both centres are within two minutes drive of one another. As a result Yate tends to be dominated by low value comparison retailing operated by multiples, whereas Chipping Sodbury which is a historic centre comprising a traditional market town and High Street, tends to serve the market through smaller outlets run by local independents. Local residents are likely to use both centres to serve their shopping needs.

3.13 Yate has a low vacancy rate and retail yields indicate investor confidence and profitable trading conditions for the town centre. Retail rents in the prime spots are thought to be high and compare favourably with other towns such as Chippenham and Weston-super-Mare.

3.14 Part of the reason for Yate’s successful position as a high ranking Town Centre is thought to be due to its very defined catchment, which isn’t affected by Bristol so much as other centres like Thornbury, which are a 15-20 minute drive from The Mall at Cribbs Causeway. In addition, Yate has a larger critical mass of shops and has been able to adapt units to meet the needs of modern national retail chains as well as having plenty of parking and expansion opportunities. Furthermore, there is a prosperous catchment living in rural areas outside the town and on the fringe of Wiltshire for which Yate is the nearest shopping centre.

3.15 The expanded Tesco store and associated extension to East Walk will deliver a mass of extra shopping space to the town centre. Convenience floorspace in the town centre is going to double and comparison floorspace provided by the Tesco store and East Walk units will increased the sales area by 80 per cent. The additional comparison floorspace has an estimated benchmark turnover of £50m per annum. For context, the existing town centre is thought to trade at £60m per annum (for comparison goods retailing). The benchmark turnover for the new convenience floorspace is thought to be £77m (current convenience turnover £79m including Morrisons).
3.16 The planned enhancements to the retail offer will certainly increase overall trading in Yate Town centre and also help to draw increased spend from other zones. Based upon the current shopping patterns, it is thought that the town will draw more trade from Chipping Sodbury, Wotton-under-Edge, Winterbourne and Frampton Cotterell. In addition it is likely that less expenditure will be leaked to other destinations, especially The Mall, Cribbs Causeway and to a lesser extent Bristol City Centre. However it is likely that some of the existing town centre retailers may lose trade as a result, particularly convenience retailers such as Iceland, Morrisons and smaller independents. Having said this, some customers will prefer smaller and quieter stores and will continue to exercise this choice. The enlarged Tesco store will also provide electrical and to a lesser extent some white goods, plus media goods (computer games, DVDs and CDs), which will boost the offer in the town centre and provide competition to Argos.

3.17 To some extent the town centre will be dominated by the Tesco store, however with a willing developer (Tesco) this presents the most viable development opportunity to deliver enhanced retailing to Yate Town Centre in the current market. Retailing in general will be strengthened, however smaller retailers and the other food stores may suffer due to polarization of trips to the new outlets. However the potential to expand the town’s catchment will be of benefit to all retailers. If performance continues to increase then other retailers may want to take up space, it is likely that these will seek to complement rather than compete with Tesco and the new operators on East Walk.

Kingswood Town Centre Healthcheck Summary

3.18 Kingswood, defined as a Town Centre appears to be popular and well supported at its centre but less successful on the periphery, with higher vacancy rates. Whilst the convenience and comparison sectors are comparable to national averages, albeit lower than average comparison floorspace, the night time economy offer is poor. Correspondingly the centre has high representation from the other service uses such as accountants. These provide jobs and opportunities to encourage people into the centre to make linked trips.

3.19 Demand from national retailers is low, and although this is to be expected to an extent with the proximity of Bristol City Centre and to a lesser extent Cribbs Causeway. Provision of larger, modern units would likely attract more multiple retailers to the centre. Parts of the centre appear tired and in need of modernisation and possibly redevelopment, particularly around the Kings Chase Shopping Centre. It is considered that improving the town centre environment, possibly though the redevelopment of the shopping centre and the under utilised area between Somerfield and the main shopping street will have a positive effect on the overall vitality and viability of the centre - at present the centre could suffer from further decline without investment and with increasing competition and convenience from other areas.

Chipping Sodbury Town Centre Healthcheck Summary

3.20 Chipping Sodbury (defined as a minor town centre) gives an impression of a busy centre with lots of people and parked cars. Its main role is to provide services and top up shopping for local residents and more specialist independent stores to the wider community and rural
catchment area. Research from the household survey illustrates that the town centre trading is a little below par, with local residents spending roughly equal amounts on retail goods in Yate as they do in Chipping Sodbury, with a greater level of leakage to Cribbs Causeway.

3.21 Whilst the provision of larger units might well attract more multiples’ interest it might also threaten the essence of the town centre, which is typified by small independent shops offering something different. There is limited opportunity for any major expansion of the shopping area. The only identified potential is the area of land to the north of the town centre which is currently occupied by open land and the main car park. Any development in this area would require new linkages through to Broad Street/High Street to ensure development was not isolated from the town centre. If there is further demand for smaller units then potential may exist behind some of the current shopping units for courtyard style redevelopment.

3.22 In terms of overall strategy it may be preferable for the town to expand with its current specialist role and look to perform as a complement, rather than try to compete directly with nearby Yate. Provision of a convenience supermarket is likely to enhance trading in the town due to increased local shopping trips.

Filton Town Centre Healthcheck Summary

3.23 Filton is defined as a minor town centre. Overall, there is a good variety of retailers and a mix of different unit sizes. The Shield Centre offers the best of the comparison shopping and hence attracts the majority of visits to Filton. The parades on Gloucester Road and Church Road are mainly focused on provision of local convenience and comparison offer. Filton is close to Cribbs Causeway and Abbeywood Retail Park (which is separate to Filton minor town centre) and as such this proximity affects Filton’s ability to grow.

Bradley Stoke Town Centre Healthcheck Summary

3.24 The emergent town centre will provide a mix of uses in the convenience, comparison and food-services sectors although the large store format may not appeal to all consumers and some residents are ambivalent about the lack of traditional community functions\(^3\) such as a post office, police station and health centre etc. Bradley Stoke is defined as a Town Centre, based upon the volume of floorspace and because it is central to the new community. At the time of the survey the Tesco store and new retail units were still becoming established and so the full impact and potential of the centre may not be reflected in some of the survey findings.

3.25 The Town Centre manager is however keen to attract more public sector organisations into the town centre and the tenant mix will undoubtedly become more balanced over time.

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\(^3\) Comments obtained through stakeholder consultation and web-based community forum relating to the new Willow Brook Centre [http://www.sadlybroke.com/towncentre/](http://www.sadlybroke.com/towncentre/).
Emersons Green Town Centre Healthcheck Summary

3.26 Emersons Green is defined as a Town Centre. Overall the low vacancy rate and presence of multiple operators suggest that the town centre is performing well in retail terms. There are a range of retail uses and services including some limited evening economy potential. With the high levels of growth anticipated on the other side of the ring road, which this centre abuts, it is likely to continue to perform well in the future. However, potential to expand in size is limited with the ring road and dense housing surrounding the site. If an expanded centre was required in this location then consideration would have to be given to either allowing the land currently allocated in the Local Plan for indoor and outdoor leisure facilities to be used or by intensification of the existing centre though reducing the car park footprint and/or increasing the density of the shops by introducing more levels within the development.

Staple Hill Town Centre Healthcheck Summary

3.27 Overall Staple Hill (defined as a Town Centre) does not appear to be competing very well. This is not helped by its linear development, which is not conducive to more modern patterns of shopping.

3.28 However the High Street is generally busy and serves local needs adequately. The town’s catchment is mixed, with both high value housing and priority neighbourhoods due to deprivation. It is thought that there is too much leakage from the higher earning residents and that enhancement would be necessary to reverse this trend.

3.29 The high level of vacancy and declining environment causes concern and it may be that a managed decline, either naturally or through policy intervention may help to consolidate more of a quality retail offer, which should focus on being different from the modern retail warehouses.

3.30 Policy intervention could downgrade the centre, potentially reducing its primary and secondary frontages and concentrate on protecting the areas around the square and supermarkets. This may also allow a concentration of resources to improve the public realm and introduce a traffic calming scheme. The Regeneration Partnership is working to improve the town centre.

3.31 Opportunity for further expansion is limited and probably not appropriate given its current trading issues. Redevelopment of the central area may be possible and could realise benefits of a more concentrated centre as indicated above.

Hanham Town Centre Healthcheck Summary

3.32 Overall, Hanham (defined as a minor town centre) does not appear to be trading very well, although vacancy rates are low. Its comparison offer could be improved but given its close proximity to the Longwell Green retail park area and the lack of larger units it is unlikely to attract any comparison multiples unless major redevelopment is considered necessary or desirable. There is a major opportunity for redevelopment to the south of the town centre, along Anstey’s Road, which is a large brownfield site currently identified as safeguarded employment land. It is understood that Tesco is interested in developing a store in this
location and own the site. However their recent planning application for a new store was refused permission in December 2009. The need for a new store will be discussed in subsequent sections of this report.

**Downend Town Centre Healthcheck Summary**

3.33 Overall Downend (defined as a minor town centre) appears to be trading relatively well. However it seems to be dominated by the service sector and whilst the low vacancy rate is welcomed, the lack of comparison offer could be a cause for concern in terms of choice and vitality. There is little opportunity for expansion without major redevelopment of the Willow Shopping Centre and adjacent car park. Improvements to the linkage between the car park, Somerfield and the rest of the town centre may realise some benefit to the town centre.

**Other Retail Locations in South Gloucestershire**

3.34 In addition to the main centres considered above there are approximately 50 local centres and parades in the District which vary in size and vitality. Further local centres are proposed with new developments for example at Cheswick Village and Harry Stoke. At Charlton Hayes (Northfield) the new local centre will be linked to the existing Patchway centre to provide a stronger community focus.

3.35 Retail provision in South Gloucestershire is complemented by the Mall and three retail parks. Residents also have good access to facilities within Bristol and within Bristol and Bath City Centres. Equally Bristol residents use facilities and help the viability of centres within South Gloucestershire.

3.36 Some parts of the country benefit from additional income from tourism - this is generally not the case in South Gloucestershire with the possible exception of business tourism linked to the commercial and manufacturing sectors largely focused in the North Fringe. Current patterns of trade are explored in more detail within Section 4.
4 CURRENT PATTERNS OF RETAIL AND LEISURE SPENDING

4.1 The starting point for considering future retail trends and needs is to establish current patterns of trade. Retail and leisure spending patterns are influenced by a number of factors including social and demographic profile of the catchment, levels of prosperity and deprivation, disposable income, choice of the retail offer, quality of the shopping experience, access to transport (car ownership locally is very high) and work patterns.

Household Survey Methodology

4.2 The assessment of current patterns of retail and leisure spending is based on a telephone survey of 1,803 households undertaken by NEMS Market Research in February 2009.

4.3 The overall catchment area is wider than the administrative area of South Gloucestershire. The study has not sought to establish the wider catchment which is very much influenced by the presence of The Mall and Cribbs Causeway, the regional shopping centre. Instead the study has looked at an indicative catchment of 18 zones covering the whole of South Gloucestershire, including partial overlaps into Gloucestershire, Bath and North East Somerset and Bristol. We ensured that there was a minimum of 100 successful survey respondents in each zone and the results were weighted according to the actual population in each zone.

4.4 The survey questionnaire sought to establish:

- Patterns of convenience goods spending, based on the location of:
  - The shop where the household spends most money on food and groceries and the amount spent per week (questions 1 and 2)
  - The shop where the household undertakes most ‘top-up’ food and groceries purchases and the amount spent per week (questions 3 and 4)
  - Spending on food and groceries in small shops for those who named supermarkets in i) and ii) above (questions 5, 6 and 7).

- Patterns of comparison goods spending, based on the locations of the last two purchases of:
  - Clothing and footwear (questions 8 and 9)
  - Furniture, carpets or soft household furnishings (questions 10 and 11)
  - DIY and decorating goods (questions 12 and 13)
  - Domestic appliances such as washing machines, fridges, cookers, TVs, DVD players or computers (questions 14 and 15), and
  - Specialist items such as jewellery, photographic goods, musical instruments or sports equipment (questions 16 and 17).

- The proportion of the household’s total spending on non-food goods that is accounted for by:
  - The internet
Paper catalogues, and
TV interactive shopping.

- Patterns of spending on leisure services based on the locations where the household spends most money on:
  - Restaurants/cafés;
  - Pubs/bars/nightclubs;
  - Cinema
  - Museums and art galleries;
  - Family entertainment centres, such as ten pin bowling, skating and so on;
  - Health and fitness;
  - Gambling – casino/bingo/bookmaker; and
  - Theatre/concerts.

4.5 The composite pattern of spending for convenience goods was achieved on the basis of the mean weekly household spend, as follows:

<table>
<thead>
<tr>
<th>Table 4.1 Composite Pattern of Convenience Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mean Household Spend</td>
</tr>
<tr>
<td>----------------------</td>
</tr>
<tr>
<td>Main Food &amp; Groceries</td>
</tr>
<tr>
<td>Top-up Food &amp; Groceries</td>
</tr>
<tr>
<td>Small Local Shops</td>
</tr>
<tr>
<td>All Convenience Goods</td>
</tr>
</tbody>
</table>


4.6 The composite pattern of spending for comparison goods was achieved on the basis of MapInfo expenditure data in relation to five categories of spend, as follows:

<table>
<thead>
<tr>
<th>Table 4.2 Composite Pattern of Comparison Goods Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>% Weighting</td>
</tr>
<tr>
<td>Clothing and footwear</td>
</tr>
<tr>
<td>Furniture, carpets and soft furnishings</td>
</tr>
<tr>
<td>Audio-visual and other durables</td>
</tr>
<tr>
<td>Hardware and DIY</td>
</tr>
<tr>
<td>Other goods</td>
</tr>
<tr>
<td>All comparison goods</td>
</tr>
</tbody>
</table>

Source: MapInfo Retail Expenditure Data (2006) for Zones 1 to 18 of the South Gloucestershire Retail Study

### The Overall Catchment Area

4.7 The overall catchment area is shown in Figure 4.1; it comprises 18 zones, based on ward areas, as set out in Spreadsheet 1 (separate volume). For convenience, we have labeled the zones with their main settlements, as set out in Table 4.3. Thus, the population in
Zones 1, 3 to 8, 10 to 13, 15 and 17 are all within the administrative area of South Gloucestershire.

Figure 4.1 Map of the Study Area Survey Zones
Table 4.3 Study Catchment Zones and Component Centres/Settlements

<table>
<thead>
<tr>
<th>Study Zone</th>
<th>Main Centre/settlement</th>
<th>Predominant Administrative Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Thornbury</td>
<td>South Gloucestershire</td>
</tr>
<tr>
<td>2</td>
<td>Wotton-under-Edge</td>
<td>Stroud/Gloucestershire</td>
</tr>
<tr>
<td>3</td>
<td>Yate</td>
<td>South Gloucestershire</td>
</tr>
<tr>
<td>4</td>
<td>Chipping Sodbury</td>
<td>South Gloucestershire</td>
</tr>
<tr>
<td>5</td>
<td>The Mall/Cribbs Causeway</td>
<td>South Gloucestershire</td>
</tr>
<tr>
<td>6</td>
<td>Winterbourne/Frampton Cotterell</td>
<td>South Gloucestershire</td>
</tr>
<tr>
<td>7</td>
<td>Emersons Green</td>
<td>South Gloucestershire</td>
</tr>
<tr>
<td>8</td>
<td>Wick/Marshfield/Pucklechurch</td>
<td>South Gloucestershire</td>
</tr>
<tr>
<td>9</td>
<td>Henbury</td>
<td>Bristol</td>
</tr>
<tr>
<td>10</td>
<td>Filton</td>
<td>South Gloucestershire</td>
</tr>
<tr>
<td>11</td>
<td>Bradley Stoke</td>
<td>South Gloucestershire</td>
</tr>
<tr>
<td>12</td>
<td>Downend</td>
<td>South Gloucestershire</td>
</tr>
<tr>
<td>13</td>
<td>Staple Hill</td>
<td>South Gloucestershire</td>
</tr>
<tr>
<td>14</td>
<td>Speedwell</td>
<td>Bristol</td>
</tr>
<tr>
<td>15</td>
<td>Kingswood</td>
<td>South Gloucestershire</td>
</tr>
<tr>
<td>16</td>
<td>Hanham/Longwell Green</td>
<td>South Gloucestershire/Bristol</td>
</tr>
<tr>
<td>17</td>
<td>Bitton</td>
<td>South Gloucestershire</td>
</tr>
<tr>
<td>18</td>
<td>Keynsham</td>
<td>BANES</td>
</tr>
</tbody>
</table>

4.8 The population of the catchment area in 2009, disaggregated by zone, is shown in the first row of figures in Spreadsheet 2. The overall population in the 2009 base year amounts to approximately 372,881 people, which is derived by applying the ONS Revised 2004 Population Projections (published in February 2008) to the 2006 ONS Mid-year Population Estimates.

4.9 Thus, having explained the methodology employed in the survey of households, we turn to the findings, which are presented in three sub-sections: convenience goods, comparison goods and leisure services.

Convenience Expenditure

4.10 The per capita spend on convenience goods in 2009 (Spreadsheet 13) varies from lows of £1,503 in Zone 9 (Henbury - inside Bristol City Council boundary) and £1,599 in Zone 14 (Speedwell - inside Bristol City Council boundary) to highs of £1,730 in Zone 4 (Chipping Sodbury) and £1,721 in Zone 7 (Emersons Green). The total amount of convenience goods spending for residents of the whole catchment area in 2009 is £644m (Spreadsheet 14), of which £11m, or 1.7 per cent, is spent on Special Forms of Trading (SFT).

---

4 This is the higher growth population scenario based upon population data used for the SOS Proposed Changes Regional Spatial Strategy (RSS). The study also considers requirements based upon the lower growth projections which were used for the Draft RSS.
4.11 The pattern of expenditure flows for the convenience goods sector as a whole, as revealed by the survey of households, is set out in Spreadsheets 15a and 15b, having excluded SFT.

4.12 Overall, some 88 per cent of the expenditure on convenience goods of residents of the catchment area is spent in town, district and local centres and in freestanding stores which are located within the catchment area; this is known as the aggregate retention rate (See Spreadsheet 15a, final column, ‘Combined sub-total for zones 1 to 18’ row). A further 12 per cent of convenience expenditure is leaked to stores outside the study catchment. These findings are summarised in Table 4.4.

Table 4.4 Broad Destination for Convenience Goods Expenditure

<table>
<thead>
<tr>
<th>Broad Destination for Convenience Goods Expenditure</th>
<th>£m</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retained Expenditure</td>
<td>£554m</td>
<td>86</td>
</tr>
<tr>
<td>Leakage</td>
<td>£80m</td>
<td>14</td>
</tr>
<tr>
<td>TOTAL</td>
<td>£644m</td>
<td>100%</td>
</tr>
</tbody>
</table>


4.13 The estimated convenience goods turnovers of the foodstores located within the catchment area, prior to making any allowance for any expenditure inflow from those who are resident beyond the catchment area, are set out in the penultimate column of Spreadsheet 15b, and are summarised in Table 4.5. The foodstores which are italicised in Table 4.5, are located within the study area, but outside the administrative boundary of South Gloucestershire itself.

Table 4.5 Convenience Goods Expenditure Retained within the Catchment Area

<table>
<thead>
<tr>
<th>Foodstores Within the Overall Catchment Area</th>
<th>Convenience Goods Turnover Drawn from Catchment Area Residents (£m)</th>
<th>% of Study Catchment Turnover</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asda, Craven Way Longwell Green</td>
<td>£79m</td>
<td>12%</td>
</tr>
<tr>
<td>J Sainsbury, Emersons Green</td>
<td>£62m</td>
<td>10%</td>
</tr>
<tr>
<td>Tesco, Yate Shopping Precinct</td>
<td>£41m</td>
<td>6%</td>
</tr>
<tr>
<td>Asda Wal-Mart Supercentre, Highwood Lane Patchway</td>
<td>£36m</td>
<td>6%</td>
</tr>
<tr>
<td>Tesco, Brook Way, Bradley Stoke</td>
<td>£38m</td>
<td>6%</td>
</tr>
<tr>
<td>Morrisons, Station Road, Yate</td>
<td>£36m</td>
<td>6%</td>
</tr>
<tr>
<td>Tesco, Midland Way Thornbury</td>
<td>£30m</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Morrisons, Fishponds Road, Fishponds</strong></td>
<td>£32m</td>
<td>5%</td>
</tr>
<tr>
<td>J Sainsbury, Fox Den Road, Stoke Gifford</td>
<td>£28m</td>
<td>4%</td>
</tr>
<tr>
<td>Morrisons, Lysander Road, Cribbs Causeway</td>
<td>£16m</td>
<td>3%</td>
</tr>
<tr>
<td>Somerfield, Willows Shopping Centre, Downend</td>
<td>£13m</td>
<td>2%</td>
</tr>
<tr>
<td>J Sainsbury, Kings Chase Centre, Kingswood</td>
<td>£12m</td>
<td>2%</td>
</tr>
<tr>
<td><strong>Co-operative, Broadmead Lane, Keynsham</strong></td>
<td>£9m</td>
<td>1%</td>
</tr>
</tbody>
</table>

Thus, the 13 main foodstores located within the catchment area, as listed in Table 4.5, collectively account for 67 per cent of the aggregate convenience goods expenditure of the catchment area’s residents. It also indicates from the overall retention rate of 86 per cent, that roughly 19 per cent is distributed to other foodstores within the study catchment. The table illustrates that although ASDA at Longwell Green and Sainsbury’s at Emersons Green secure significant market shares, there are a number of other large foodstores all competing for a market share of 4 to 6 per cent.

4.15 The main leakage destinations for convenience goods expenditure, again as shown in the second part of Spreadsheet 14a and 14b (Volume 2 Report), are set out in Table 4.6:

Table 4.6 Main Destinations for Convenience Goods Expenditure Leakage

<table>
<thead>
<tr>
<th>Foodstores Outside the Overall Catchment Area</th>
<th>Convenience Goods Turnover Drawn from Catchment Area Residents (£m)</th>
<th>% of Study Catchment Turnover</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tesco, Lime Trees Road, Henleaze, Bristol</td>
<td>£11m</td>
<td>2%</td>
</tr>
<tr>
<td>Tesco, Callington Road Brislington, Bristol</td>
<td>£10m</td>
<td>2%</td>
</tr>
<tr>
<td>Others - Outside Catchment Area</td>
<td>£37m</td>
<td>5%</td>
</tr>
</tbody>
</table>


Zonal Retention Levels

4.16 The catchment area’s retention level by zone, which is the percentage of expenditure generated in a zone which is spent within the overall study catchment (see Spreadsheet 14a, ‘Combined sub-total for zones 1 to 18’ row) varies from lows of 61 per cent in Zone 10 (Filton) and 76 per cent in Zone 9 (Henbury), to a high of 98 per cent in Zone 3 (Yate). There are also very high catchment area zonal retention levels of over 90 per cent for Zone 1 (Thornbury), Zone 4 (Chipping Sodbury), Zone 5 (The Mall/Cribbs Causeway), Zone 6 (Winterbourne/Frampton Cotterell), Zone 11 (Bradley Stoke), and Zone 17 (Bitton).

Localised Retention Rates

4.17 The localised convenience goods retention rate - which is the proportion of expenditure on convenience goods available to residents in a specific zone which is spent in town centres and stores located within that zone - is highest for Zone 3 (Yate), which has a localised retention rate of 89 per cent (see Spreadsheet 15a, ‘Zone 3’ column and ‘Sub Total Zone 3’ row and Table 4.17 (below). The next highest localised retention rates for convenience goods are for Zone 11 (Bradley Stoke), which has a localised retention rate of 79 per cent and Zone 1 (Thornbury) with a localised retention rate of 78 per cent. Localised retention rates for all zones are presented in Table 4.7 and Figure 4.2.
Table 4.7 Localised Convenience Goods Retention Levels

<table>
<thead>
<tr>
<th>Study Zone</th>
<th>Main Centre/settlement</th>
<th>Localised Retention Rates (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Thornbury</td>
<td>78%</td>
</tr>
<tr>
<td>2</td>
<td>Wotton-under-Edge</td>
<td>36%</td>
</tr>
<tr>
<td>3</td>
<td>Yate</td>
<td>89%</td>
</tr>
<tr>
<td>4</td>
<td>Chipping Sodbury</td>
<td>10%</td>
</tr>
<tr>
<td>5</td>
<td>The Mall/Cribbs Causeway</td>
<td>69%</td>
</tr>
<tr>
<td>6</td>
<td>Winterbourne/Frampton Cotterell</td>
<td>15%</td>
</tr>
<tr>
<td>7</td>
<td>Emersons Green</td>
<td>58%</td>
</tr>
<tr>
<td>8</td>
<td>Wick/Marshfield/Pucklechurch</td>
<td>13%</td>
</tr>
<tr>
<td>9</td>
<td>Henbury</td>
<td>20%</td>
</tr>
<tr>
<td>10</td>
<td>Filton</td>
<td>9%</td>
</tr>
<tr>
<td>11</td>
<td>Bradley Stoke</td>
<td>79%</td>
</tr>
<tr>
<td>12</td>
<td>Downend</td>
<td>51%</td>
</tr>
<tr>
<td>13</td>
<td>Staple Hill</td>
<td>18%</td>
</tr>
<tr>
<td>14</td>
<td>Speedwell</td>
<td>1%</td>
</tr>
<tr>
<td>15</td>
<td>Kingswood</td>
<td>31%</td>
</tr>
<tr>
<td>16</td>
<td>Hanham/Longwell Green</td>
<td>19%</td>
</tr>
<tr>
<td>17</td>
<td>Bitton</td>
<td>67%</td>
</tr>
<tr>
<td>18</td>
<td>Keynsham</td>
<td>56%</td>
</tr>
</tbody>
</table>

Figure 4.2 Study Area Localised Retention Rates for Convenience Spending
Notably, the lowest retention rates are for zones which either, border with Bristol, where there a large foodstores nearby but in adjacent zones, or where there is a lack of provision locally. This applies to the following zones:

- Zone 16 (Hanham) has a low localised retention rate, due to a lack of a large foodstore. The household survey shows that residents mainly travel to ASDA at Longwell Green in Zone 17, but also further afield to Tesco in Brislington (outside the study catchment) and to Sainsbury’s at Embrons Green. This may reflect qualitative choice of store or journey to work patterns.
- Zones 9 (Henbury) is in the Bristol administrative area. Residents predominantly look towards ASDA and Morrisons at Cribbs Causeway and Tesco in Henleaze (outside of the study catchment)
- Zone 10 (Filton) doesn’t have a large foodstore. Residents look primarily to the Sainsbury’s at Stoke Gifford, in adjacent Zone 11, which is only just outside zone 10. However a somewhat significant convenience expenditure is also dispersed further afield to Willow Brook Tesco at Bradley Stoke (Zone 11) and Tesco at Lime Trees Road in Henleaze (outside the study catchment area)
- Zone 14 (Speedwell) is wholly within the Bristol administrative area but looks largely to other zones in the study catchment for 79 per cent of its convenience needs. ASDA at Longwell Green and Morrisons in Fishponds achieve the highest market shares from Zone 14. We note that Fishponds Town Centre is just outside the study catchment but the Morrisons foodstore is inside Zone 12
- Zone 4 (Chipping Sodbury) has a low localised rention rate of 10 per cent due to the lack of a large foodstore within the zone. Nearby Yate draws 78 percent of convenience expenditure from Zone 4, where there is Tesco, Morrisons and Lidl.

Thus, the survey findings suggest that there is a need for an improved convenience offer in Chipping Sodbury and Hanham in particular. Filton has a low localised retention level but has presence of several large foodstores just outside the zone.

Convenience Goods Market Shares

As stated earlier, it was found that the 13 large foodstores within the overall catchment area which achieve a market share of more than 1 per cent, collectively account for 67 per cent of the aggregate convenience goods expenditure of catchment area residents. Table 4.18 presents an analysis of convenience goods market shares, which shows dominant stores, with a zonal market share of over 40 per cent and stores with shares between 10 and 40 per cent, which have a subsidiary influence.

The analysis in Table 4.8 shows that:

- Eleven of the 18 survey zones do not have dominant foodstores
- Tesco in Thornbury, Zone 1, is the only unopposed dominant foodstore in the study catchment
- No zones have two dominant stores
- Several zones have three or more competing subsidiary stores and no dominant store: including, Zone 2 (Wotton-under-Edge), Zone 6 (Winterbourne/Frampton
Cotterell), Zone 10 (Filton), Zone 12 (Downend), Zone 13 (Staple Hill), Zone 15 (Kingswood), Zone 16 (Hanham) and Zone 18 (Keynsham)

- A number of individual foodstores achieve very high localised retention rates, these are:
  - Tesco, Thornbury - 61 per cent
  - ASDA Longwell Green - 60 per cent
  - Sainsbury’s, Emersons Green - 56 per cent, and
  - ASDA Wal-Mart, Cribbs Causeway - 50 per cent

4.22 Therefore, Tesco at Thornbury and ASDA at Longwell Green and possibly Sainsbury’s at Emersons Green may fail the indicative Competition Commissions’ Competition Test, where a single foodstore should not attain a 60 per cent, or greater, market share within a 10 minute travel time isochrones from its location.

4.23 The survey findings show that although for some zones convenience shopping is undertaken on a fairly localised basis, there are a number of stores which attain a market share of over 10 per cent in three or more other zones. These stores are:

- Tesco and Morrisons in Yate, who both attract more than 10 per cent share from Zone 2 (Wotton-under-Edge), Zone 4 (Chipping Sodbury) and Zone 6 (Winterbourne/Frampton Cotterell)
- Sainsbury’s at Emersons Green which receives more than 10 per cent market share from six other zones
- ASDA at Longwell Green, which achieves a 10 per cent share, or greater, from seven other zones.
### Table 4.8 Market Shares for Convenience Goods Dominant Stores and Stores with Subsidiary Influence

<table>
<thead>
<tr>
<th>Zone</th>
<th>Main Centre/settlement</th>
<th>Dominant Stores (Market Share of 40%+)</th>
<th>Subsidiary Stores (Market Share 10 to 40%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Thornbury</td>
<td>Tesco, Midland Way, Thornbury</td>
<td>Co-op, Long Street, Wotton-under-Edge</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Tesco, East Walk, Yate Shopping Precinct</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Tesco, Roseberry Road, Dursley (outside study catchment)</td>
</tr>
<tr>
<td>2</td>
<td>Wotton-under-Edge</td>
<td></td>
<td>Morrisons, Station Road, Yate</td>
</tr>
<tr>
<td>3</td>
<td>Yate</td>
<td>Tesco, East Walk, Yate Shopping Precinct</td>
<td>Morrisons, Station Road, Yate</td>
</tr>
<tr>
<td>4</td>
<td>Chipping Sodbury</td>
<td>Tesco, East Walk, Yate Shopping Precinct</td>
<td>Morrisons, Station Road, Yate</td>
</tr>
<tr>
<td>5</td>
<td>The Mall/Cribbs Causeway</td>
<td>Asda Wal-Mart Supercentre, Highwood Lane (Cibbs Causeway)</td>
<td>Morrisons, Lysander Road, Cribbs Causeway</td>
</tr>
<tr>
<td>6</td>
<td>Winterbourne/Frampton Cotterell</td>
<td>Tesco, East Walk, Yate Shopping Precinct</td>
<td>Morrisons, Station Road, Yate</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Tesco, Brook Way Bradley Stoke</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>J Sainsbury, Fox Den Road Stoke Gifford</td>
</tr>
<tr>
<td>7</td>
<td>Embers Green</td>
<td>J Sainsbury, Emersons Green</td>
<td>Asda, Craven Way Longwell Green</td>
</tr>
<tr>
<td>8</td>
<td>Wick/Marshfield/ Pucklechurch</td>
<td>J Sainsbury, Emersons Green</td>
<td>Asda, Craven Way Longwell Green</td>
</tr>
<tr>
<td>9</td>
<td>Henbury</td>
<td>Asda Wal-Mart Supercentre, Highwood Lane (Cibbs Causeway)</td>
<td>Morrisons, Lysander Road Cribbs Causeway</td>
</tr>
<tr>
<td>10</td>
<td>Filton</td>
<td>Tesco, Brook Way Bradley Stoke</td>
<td>J Sainsbury, Fox Den Road Stoke Gifford</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Tesco, Lime Trees Road, Henleaze (outside study catchment)</td>
</tr>
<tr>
<td>11</td>
<td>Bradley Stoke</td>
<td>Tesco, Brook Way Bradley Stoke</td>
<td>J Sainsbury, Fox Den Road Stoke Gifford</td>
</tr>
<tr>
<td>12</td>
<td>Downend</td>
<td>J Sainsbury, Emersons Green</td>
<td>Morrisons, Fishponds Road, Fishponds</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>J Sainsbury, Emersons Green, Somersetfield, Willows Shopping Centre, Downend</td>
</tr>
<tr>
<td>13</td>
<td>Staple Hill</td>
<td>J Sainsbury, Emersons Green</td>
<td>Morrisons, Fishponds Road, Fishponds</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Asda, Craven Way, Longwell Green</td>
</tr>
<tr>
<td>14</td>
<td>Speedwell</td>
<td>J Sainsbury, Emersons Green</td>
<td>Morrisons, Fishponds Road Fishponds</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Asda, Craven Way Longwell Green</td>
</tr>
<tr>
<td>15</td>
<td>Kingswood</td>
<td>J Sainsbury, Emersons Green, Somersetfield, Kings Chase Centre, Kingswood</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Hanham/Longwell Green</td>
<td>J Sainsbury, Emersons Green, Somersetfield, Callington Road Brislington, Bristol (outside study catchment)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>J Sainsbury, Castle Court, Bloomfield Road, Bristol (outside study catchment)</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Bitton</td>
<td>Asda, Craven Way Longwell Green</td>
<td>J Sainsbury, Emersons Green</td>
</tr>
<tr>
<td>18</td>
<td>Keynsham</td>
<td>Co-operative, Broadmead Lane, Keynsham Asda, Craven Way, Longwell Green</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Somersetfield, 63c The High Street, Keynsham</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Tesco, Callington Road Brislington, Bristol (outside study catchment)</td>
</tr>
</tbody>
</table>

Thus, Table 4.9 below confirms the position for the 13 large foodstores inside the study area, giving details of the main catchment zones and the percentage of the total store turnover generated by these zones:

**Table 4.9 Top 13 Foodstores and their Key Catchment Zones (listed in order of store turnover)**

<table>
<thead>
<tr>
<th>Store</th>
<th>Zone Location</th>
<th>Zones which direct &gt;10% market share to store</th>
<th>Contribution to Store Turnover</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asda, Craven Way, Longwell Green</td>
<td>17</td>
<td>Zones 7, 8, 13, 14, 15, 16, 17, &amp; 18</td>
<td>95%</td>
</tr>
<tr>
<td>J Sainsbury, Emersons Green</td>
<td>7</td>
<td>Zones 7, 8, 12, 13, 15, 16 &amp; 17</td>
<td>89%</td>
</tr>
<tr>
<td>Tesco, Yate Shopping Precinct</td>
<td>3</td>
<td>Zones 2, 3, 4 &amp; 6</td>
<td>93%</td>
</tr>
<tr>
<td>Asda Wal-Mart Supercentre, Cribbs Causeway</td>
<td>5</td>
<td>Zones 5 &amp; 9</td>
<td>75%</td>
</tr>
<tr>
<td>Tesco, Willow Brook, Bradley Stoke</td>
<td>11</td>
<td>Zones 6, 10 &amp; 11</td>
<td>88%</td>
</tr>
<tr>
<td>Morrisons, Station Road, Yate</td>
<td>3</td>
<td>Zones 2, 3, 4 &amp; 6</td>
<td>90%</td>
</tr>
<tr>
<td>Tesco, Midland Way Thornbury</td>
<td>1</td>
<td>Zone 1</td>
<td>78%</td>
</tr>
<tr>
<td><em>Morrisons, Fishponds Road, Fishponds</em></td>
<td>12</td>
<td>Zones 12, 13 &amp; 14</td>
<td>88%</td>
</tr>
<tr>
<td>J Sainsbury, Fox Den Road, Stoke Gifford</td>
<td>11</td>
<td>Zones 6, 10 &amp; 11</td>
<td>87%</td>
</tr>
<tr>
<td>Morrisons, Lysander Road, Cribbs Causeway</td>
<td>5</td>
<td>Zones 5 &amp; 9</td>
<td>48%</td>
</tr>
<tr>
<td>J Sainsbury, Kings Chase Centre, Kingswood</td>
<td>15</td>
<td>Zone 15</td>
<td>45%</td>
</tr>
<tr>
<td>Somerfield, Willows Shopping Centre, Downend</td>
<td>12</td>
<td>Zone 12</td>
<td>60%</td>
</tr>
<tr>
<td><em>Co-operative, Broadmead Lane, Keynsham</em></td>
<td>18</td>
<td>Zone 18</td>
<td>98%</td>
</tr>
</tbody>
</table>


Thus the two stores with the widest appeal (ASDA at Longwell Green and Sainsbury’s at Emersons Green) are both the largest convenience stores in the study catchment (except the recently opened Tesco at Bradley Stoke) and positioned in densely populated locations, where there where there is a lack of strong competition nearby.

Some of the large foodstores with smaller turnovers (those at the bottom of Table 4.9), such as Sainsbury’s at Kingswood, Morrisons at Cribbs Causeway and Somerfield at Downend do not obtain a particularly large share of their turnover from their local zone or any other zones in the catchment. This indicates that they act as lower order stores providing subsidiary convenience goods mainly to local residents but also for smaller ‘top-up’ purchases to people from a number of other zones.

**Comparison Expenditure**

Residents of the study area have varying amounts to spend on comparison shopping ranging from an average of £2719 in Henbury to £3394 in Bradley Stoke. This amounts to a total of £1,304m. By definition residents have a wide degree of choice in where that money is spent. The household survey indicates that £136m, or 10.4 per cent, is spent on...
Special Forms of Trading (catalogue, TV and internet shopping, which is subsequently abbreviates as SFT).

4.28 The pattern of expenditure flows (as a percentage and in £m) for the comparison goods sector, as revealed by the survey of households, is set out in Spreadsheets 5a and 5b (including SFT).

4.29 Overall, some 59 per cent of the expenditure on comparison goods of residents of the catchment area is spent in town, district and local centres, in retail parks and in freestanding stores which are located within the catchment area; this is known as the aggregate retention rate (see Spreadsheet 5a, final column which is summarised in Table 4.10). Some 30 per cent of comparison goods expenditure flows to other town and city centres and retail parks outside the catchment area (Predominantly to Bristol City Centre). Over 10 per cent is spent on SFT.

<table>
<thead>
<tr>
<th>Broad Destination for Comparison Goods Expenditure</th>
<th>£m</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retained Expenditure</td>
<td>£771m</td>
<td>59</td>
</tr>
<tr>
<td>Locations Outside the Study Catchment (leakage)</td>
<td>£386m</td>
<td>30</td>
</tr>
<tr>
<td>SFT</td>
<td>£148m</td>
<td>11</td>
</tr>
<tr>
<td>TOTAL</td>
<td>£1304m</td>
<td>100</td>
</tr>
</tbody>
</table>


4.30 The estimated comparison goods turnovers of the town centres located within the catchment area, are set out in the final column of Spreadsheet 6b, and are summarised in Table 4.11 below. The centres/retail parks which are italicised in Table 4.11, are located within the overall catchment area, but outside the administrative boundary of South Gloucestershire Council.
Table 4.11 Comparison Goods Expenditure Retained within the Catchment Area

<table>
<thead>
<tr>
<th>Towns Within the Catchment Area</th>
<th>Comparison Goods Turnover Drawn from Catchment Area Residents (£m)</th>
<th>% of Study Catchment Turnover</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thornbury Town Centre</td>
<td>£11m</td>
<td>1%</td>
</tr>
<tr>
<td>Wotton-under-Edge Town Centre*</td>
<td>£4m</td>
<td>0.3</td>
</tr>
<tr>
<td>Yate Town Centre</td>
<td>£60m</td>
<td>5%</td>
</tr>
<tr>
<td>Chipping Sodbury Town Centre</td>
<td>£3m</td>
<td>0.2%</td>
</tr>
<tr>
<td>Filton Town Centre</td>
<td>£21m</td>
<td>1.6%</td>
</tr>
<tr>
<td>Bradley Stoke Town Centre**</td>
<td>£2m</td>
<td>0.2%</td>
</tr>
<tr>
<td>Staple Hill Town Centre</td>
<td>£8m</td>
<td>0.6%</td>
</tr>
<tr>
<td>Emersons Green Town Centre</td>
<td>£39m</td>
<td>3%</td>
</tr>
<tr>
<td>Downend Town Centre</td>
<td>£2m</td>
<td>0.1%</td>
</tr>
<tr>
<td>Kingswood Town Centre</td>
<td>£18m</td>
<td>1.4%</td>
</tr>
<tr>
<td>Hanham Town Centre</td>
<td>£1m</td>
<td>0.1%</td>
</tr>
<tr>
<td><strong>Keynsham Town Centre</strong></td>
<td>£12m</td>
<td>1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Retail Parks and Freestanding Stores within the Catchment Area</th>
<th>Comparison Goods Turnover Drawn from Catchment Area Residents (£m)</th>
<th>% of Study Catchment Turnover</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cribbs Causeway Retail Park</td>
<td>£237m</td>
<td>18%</td>
</tr>
<tr>
<td>The Mall</td>
<td>£151m</td>
<td>12%</td>
</tr>
<tr>
<td>Longwell Green Retail Park</td>
<td>£116m</td>
<td>9%</td>
</tr>
<tr>
<td>B&amp;Q Station Road, Yate</td>
<td>£21m</td>
<td>2%</td>
</tr>
<tr>
<td>B&amp;Q Warehouse, Stoke Gifford</td>
<td>£10m</td>
<td>1%</td>
</tr>
</tbody>
</table>


* Wotton-under-Edge and Keynsham are outside of South Gloucestershire’s administrative area.

** The survey predates full opening of the centre at Bradley Stoke and therefore will understate actual comparison expenditure there.

4.31 Table 4.11 shows that there is no single strategic town centre for comparison retailing. Cribbs Causeway and The Mall (retail park and shopping centre) are by far the prime locations for comparison retailing, receiving a combined expenditure of £384m per annum from residents within the study catchment. As a regional shopping outlet the actual catchment and turnover will be significantly higher. Table 4.5 also shows that Longwell Green Retail Park is the third largest recipient of expenditure; it draws around £104m from the overall study catchment (zones 1-18). Furthermore, we note that the third ranking location within South Gloucestershire’s administrative area is Yate Town Centre, which is by far the best performing town centre within the study catchment. Yate Town Centre retains 27 per cent (£67m) of Zone 3’s expenditure, with significantly less leakage to Cribbs Causeway and The Mall compared to other town centres in the study area. Both Emersons Green and Filton Town Centres trade at a fairly high level. They both attract expenditure from adjacent zones (which have their own town centres); this is thought to be due to the presence of warehouse-style comparison units with free car parking facilities.
4.32 The ‘market shares’ revealed by the household survey implies that, at this stage, the major town centres in South Gloucestershire (for comparison retailing) are Yate, Emersons Green, Filton and Kingswood. Minor town centres capturing less than 1 per cent of comparison expenditure are Thornbury, Chipping Sodbury, Bradley Stoke, Staple Hill, Downend and Hanham. However we note that as Bradley Stoke Town Centre is now complete and that the trading patterns will establish over time.

4.33 The main destinations for leakage, as shown in the final column of Spreadsheet 5a and 5b, are summarised in Table 4.12. There are five principle destinations for comparison goods expenditure leakage which, in order of importance, are Bristol City Centre, Bath City Centre, Fishponds Town Centre, abroad/overseas and SFT.

### Table 4.12 Main Destinations for Comparison Goods Expenditure Leakage

<table>
<thead>
<tr>
<th>Towns Outside the Catchment Area</th>
<th>Comparison Goods Turnover Drawn from Catchment Area Residents (£m)</th>
<th>% of Study Catchment Turnover</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bristol City Centre</td>
<td>£179m</td>
<td>14%</td>
</tr>
<tr>
<td>Bath City Centre</td>
<td>£35m</td>
<td>3%</td>
</tr>
<tr>
<td>Retail Parks and Freestanding Stores Outside the Catchment Area</td>
<td>Comparison Goods Turnover Drawn from Catchment Area Residents (£m)</td>
<td>% of Study Catchment Turnover</td>
</tr>
<tr>
<td>Brislington Retail Park</td>
<td>£19m</td>
<td>1%</td>
</tr>
<tr>
<td>Fishponds</td>
<td>£20m</td>
<td>2%</td>
</tr>
<tr>
<td>Avonmead Retail Park, St Philips Causeway</td>
<td>£9m</td>
<td>1%</td>
</tr>
<tr>
<td>Abroad/overseas</td>
<td>£19m</td>
<td>1%</td>
</tr>
<tr>
<td>SFT</td>
<td>£147m</td>
<td>11%</td>
</tr>
</tbody>
</table>


4.34 The catchment area’s retention level by zone, that is, the percentage of each zone’s expenditure that is retained in the overall study catchment (see Spreadsheet 5a, ‘combined sub-total for zones 1 to 18’ row) varies from lows of 39 per cent in Zone 16 (Hanham, Longwell Green), 41 per cent in Zone 12 (Downend) and 44 per cent in Zone 18 (Keynsham), to highs of 72 per cent in Zone 3 (Yate), 72 per cent in Zone 11 (Bradley Stoke), and 73 per cent in Zone 5 (The Mall/Cribbs Causeway).

4.35 The localised retention rate - which is the proportion of expenditure on comparison goods in a specific zone which is spent in town centres and stores located within that zone - is highest for Zone 5 (Cribbs Causeway/The Mall), at 68 per cent (see Spreadsheet 5a, ‘Zone 5’ column and ‘Sub Total Zone 5’ row). The next highest localised retention rates for comparison goods are for Zone 3 (Yate), which has a localised retention rate of 36 per cent, then Zone 16 (Longwell Green and Hanham) which has a localised rate of 19 per cent, and Zone 18 (Keynsham) which has a localised retention rate of 14 per cent.

4.36 Notably, Zones 8 and 14 (Bradley Stoke and Speedwell) have localised retention rates of 0 per cent, with Zones 9 and 12 (Henbury and Downend) both having a localised retention
rate of less than 1 per cent. This indicates that no (or very little) comparison shopping takes places in these zones.

**Figure 4.3 Study Area Zonal Retention Rates for Comparison Spending**
Figure 4.3 presents an analysis of zonal retention rates for comparison goods across the study area, which is the percentage of the zone’s available expenditure which is retained within the study area. From this analysis, we are able to see the influence that Bristol City Centre has on the east fringe of Bristol. Retention is highest within the core central areas of the study area where the influence of The Mall and Cribbs Causeway is attractive and reduces leakage.

**Comparison Goods Market Shares in the Town Centres**

The report looks at the comparison goods market shares of the main town centres, namely, Thornbury, Yate, Chipping Sodbury, Kingswood, Emersons Green, Bradley Stoke, Downend, Staple Hill and Hanham.

**Thornbury Town Centre**

The survey findings indicate that Thornbury Town Centre secures a comparison goods market share of 10 per cent in its local Zone 1. The only other zone from which Thornbury Town Centre derives any significant level of comparison goods expenditure is Zone 2 (Wotton-under-Edge), whereby 2 per cent of Zone 2 expenditure is spent in Thornbury. The household survey indicates that Thornbury Town Centre has a total comparison goods turnover of £11m per annum.

**Yate**

Yate Town Centre retains 27 per cent of the comparison expenditure generated in its constituent Zone 3. Yate also derives significant shares from neighbouring zones, as follows:

- 23 per cent from Zone 4 - Chipping Sodbury
- 11 per cent from Zone 2 - Wotton-under-Edge
- 10 per cent from Zone 6 - Winterbourne/Frampton Cotterell
- 6 per cent from Zone 8 - Wick/Marshfield/Pucklechurch.

The household survey indicates that Yate Town Centre has a total turnover of £60m. It is also relevant to note that the B&Q store in Zone 3 has an estimated turnover of £21m (derived from the household survey and per capita expenditure data for study area residents).

**Chipping Sodbury**

Chipping Sodbury Town Centre is the sole recipient for comparison goods expenditure within Zone 4 (i.e. no other stores or settlements in Zone 4 receive comparison spending). This is at a low level of just 2 per cent of all of Zone 4 expenditure. The overall turnover of Chipping Sodbury is shown to be £3m; £0.8m of this is from Zone 4 residents the rest is attracted from the surrounding zones with £1m coming from Zone 3.

**Kingswood**

Kingswood secures a market share of 1.4 per cent from the total study catchment. However, only 6 per cent of the local Zone 15 expenditure on comparison goods is
directed to Kingswood Town Centre. Kingswood Town Centre does however derive notable market shares from adjoining zones of: Zone 14 (6 per cent - Speedwell), Zone 13 (3 per cent - Staple Hill), Zone 16 (3 per cent - Hanham) and Zone 17 (3 per cent - Bitton). In total Kingswood Town Centre has a turnover of £18m.

**Emersons Green**

Emersons Green is located in study Zone 7 and attracts a market share of 3 per cent (from the whole catchment) and a turnover of £39m - the second highest turnover of the District’s town centres after Yate. The largest share of the town centre’s turnover comes from adjacent Zone 13 (Staple Hill), where 9 per cent of the Zone’s expenditure is directed to Emersons Green. Local Zone 7 residents make 7 per cent of their comparison purchases at Emersons Green. In addition, significant market shares are drawn from five other zones, namely:

- Zone 15 (Kingswood), attributes 8 per cent of their spend to Emersons Green
- Zone 12 (Downend), attributes 6 per cent of their spend to Emersons Green
- Zone 14 (Speedwell), attributes 7 per cent of their spend to Emersons Green, and
- Zone 17 (Bitton), attributes 5 per cent.

**Bradley Stoke**

At the time of the survey, Bradley Stoke Town Centre attained a minor comparison share of 0.7 per cent from the overall study catchment. This equates to £8m and draws less than 1 per cent from any other zone in the study catchment. It is worth noting that additional comparison floorspace has recently been developed as part of the Willow Brook Town Centre scheme, with a number of units still under construction. Although some of the new comparison units were trading during the time of the household surveys (February 2009) the town centre is likely to increase its market share, especially from local Zone 11 residents.

**Downend**

Downend Town Centre receives an overall market share of just 0.1 per cent on comparison spend, which is almost exclusively from local Zone 12 and Zone 14 residents.

**Staple Hill**

As with Downend, Staple Hill captures a very small overall market share for comparison goods of 0.6 per cent.

**Hanham**

Hanham Town Centre has the smallest market share of the District’s town centres with just 0.1 per cent of comparison spend being directed towards the centre’s shopping facilities.

**Overlapping Comparison Goods Catchments**
Table 4.13 and Figure 4.4 present an analysis of dominant centres, where the comparison goods market share exceeds 40 per cent, and centres of subsidiary influence, which are defined on the basis of having comparison goods market shares of between 10 per cent and 40 per cent. For the purposes of this assessment, The Mall and Cribbs Causeway have been combined as one shopping location.

**Table 4.13 Dominant Comparison Goods Centres and Centres of Subsidiary Influence**

<table>
<thead>
<tr>
<th>Zone</th>
<th>Main settlement/centre in zone</th>
<th>Centres/Retail Parks of Dominant Influence (mkt share 40%+)</th>
<th>Centres/Retail Parks of Subsidiary Influence (mkt share 10%-40%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Thornbury</td>
<td>The Mall &amp; Cribbs Causeway</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Wotton-under-Edge</td>
<td>The Mall &amp; Cribbs Causeway, Yate Town Centre</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Yate</td>
<td>The Mall &amp; Cribbs Causeway, Yate Town Centre</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Chipping Sodbury</td>
<td>The Mall &amp; Cribbs Causeway, Yate Town Centre, Bristol City Centre</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>The Mall/Cribbs Causeway</td>
<td>The Mall &amp; Cribbs Causeway</td>
<td>Bristol City Centre</td>
</tr>
<tr>
<td>6</td>
<td>Winterbourne/Frampton Cotterell</td>
<td>The Mall &amp; Cribbs Causeway, Yate Town Centre, Bristol City Centre</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Emersons Green</td>
<td>The Mall &amp; Cribbs Causeway, Longwell Green Retail Park, Bristol City Centre</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Wick/Marshfield/Pucklechurch</td>
<td>The Mall &amp; Cribbs Causeway, Longwell Green Retail Park, Bath City Centre</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Henbury</td>
<td>The Mall &amp; Cribbs Causeway</td>
<td>Bristol City Centre</td>
</tr>
<tr>
<td>10</td>
<td>Filton</td>
<td>The Mall &amp; Cribbs Causeway</td>
<td>Bristol City Centre</td>
</tr>
<tr>
<td>11</td>
<td>Bradley Stoke</td>
<td>The Mall &amp; Cribbs Causeway</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Downend</td>
<td>The Mall &amp; Cribbs Causeway, Bristol City Centre</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Staple Hill</td>
<td>The Mall &amp; Cribbs Causeway, Longwell Green Retail Park, Bristol City Centre</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Speedwell</td>
<td>Bristol City Centre, Longwell Green Retail Park, The Mall &amp; Cribbs Causeway</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Kingswood</td>
<td>Bristol City Centre, Longwell Green Retail Park</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Hanham/Longwell Green</td>
<td>Bristol City Centre, Longwell Green Retail Park, The Mall &amp; Cribbs Causeway</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Bitton</td>
<td>Longwell Green Retail Park, Bristol City Centre, The Mall &amp; Cribbs Causeway</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Keynsham</td>
<td>Longwell Green Retail Park, Bath City Centre, Bristol City Centre, Keynsham Town Centre</td>
<td></td>
</tr>
</tbody>
</table>

Figure 4.4 Comparison Goods Market Shares: Dominant Centres and Centres of Subsidiary Influence
Thus, Table 4.13 and Figure 4.4 reveal that:

- The Mall & Cribbs Causeway is the un-opposed dominant centre in just two zones – Zone 5, it’s local zone and Zone 11, Bradley Stoke.
- The Mall & Cribbs Causeway is the dominant comparison centre for three other zones but in these zones it is competing with a centre which has subsidiary influence, i.e. Zones 1, 9 and 10 where the subsidiary influence centres are Thornbury Town Centre and Bristol City Centre.
- There are no other dominant centres for zones in the study catchment.
- Thirteen zones do not have a dominant centre; nine zones have three or more subsidiary influencing centres.

Table 4.13 shows that zonal expenditure in the catchment area is generally distributed to a number of retail centres within the district, with a notable leakage to Bristol City Centre. This is prevalent for zones on the Bristol fringe, where expenditure tends to be directed fairly evenly between, Bristol City Centre, Longwell Green Retail Park and The Mall/Cribbs Causeway.

**Comparison Goods Sub-sectors**

We now turn to the pattern of shopping for various comparison goods sub-sectors, these are:

- Clothing and footwear, which accounts for £300m of comparison goods spending
- Furniture, carpets, and soft household furnishings, which accounts for £155m of comparison goods spending
- DIY and decorating goods, which accounts for £146m of comparison goods spending
- Domestic appliances, which accounts for £222m of comparison goods spending, and
- Specialist comparison items (such as jewellery, photographic items, sports equipment and musical instruments), which accounts for £481m of comparison goods spending.

**Clothing and Footwear**

Overall, 59 per cent of the expenditure on clothes and footwear of residents of the catchment area is spent in town centres, retail parks and in freestanding stores which are located within the catchment area (see final column of Spreadsheet 7a); this is a relatively modest retention level for basic comparison needs when compared with most urban areas. This reflects the dispersed suburban nature of the area, high car ownership and wide choice of accessible centres.

Cribbs Causeway and The Mall account for almost a third of the catchment's spend on clothing and footwear (£94m), followed by Longwell Green Retail Park (£14m), Yate Town Centre (£17m) and ASDA at Longwell Green (£9m).

The main leakage destinations for clothing and footwear are Bristol City Centre, special forms of trading and Bath City Centre as illustrated in Table 4.14.
Table 4.14 Leakage Destinations for Clothes and Shoes

<table>
<thead>
<tr>
<th>Towns Outside the Study Area &amp; Other Leakage Destinations</th>
<th>Clothes &amp; Footwear Expenditure (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bristol</td>
<td>£54m</td>
</tr>
<tr>
<td>SFT</td>
<td>£24m</td>
</tr>
<tr>
<td>Other Stores, Outside Catchment Area</td>
<td>£21m</td>
</tr>
<tr>
<td>Bath</td>
<td>£10m</td>
</tr>
</tbody>
</table>


**Furniture, Carpet and Soft Furnishings**

4.56 Overall, 50 per cent of the expenditure on furniture, carpets and soft furnishings of residents of the catchment area is spent in town centres, retail parks and in freestanding stores which are located within the catchment area (see final column of Spreadsheet 7c); this is a low retention level.

4.57 The survey shows that spending patterns are much more dispersed for the furniture category with only two locations achieving a market share of over 10 per cent. Cribbs Causeway Retail Park has the highest market share overall and also attracts the highest market share from 11 of the 18 zones in the study catchment. Longwell Green attains a share of 6 per cent (£9m); however most expenditure is leaked to stores and locations outside of the study catchment as depicted in Table 4.15 below.

Table 4.15 Leakage Destinations for Furniture, Carpets and Soft Furnishings

<table>
<thead>
<tr>
<th>Towns Outside the Study Area &amp; Other Leakage Destinations</th>
<th>Furniture etc Expenditure (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bristol City Centre/Broadmead/Cabot Circus</td>
<td>£25m</td>
</tr>
<tr>
<td>Ikea (Eastgate), Eastgate Rd, Bristol</td>
<td>£8m</td>
</tr>
<tr>
<td>Bedminster Town Centre (Bristol)</td>
<td>£6m</td>
</tr>
<tr>
<td>Brislington Retail park, Bath Rd, Brislington</td>
<td>£5m</td>
</tr>
<tr>
<td>Bath City Centre</td>
<td>£4m</td>
</tr>
<tr>
<td>Others - Outside Catchment Area</td>
<td>£3m</td>
</tr>
<tr>
<td>Fishponds Town Centre (Bristol)</td>
<td>£2m</td>
</tr>
</tbody>
</table>


**DIY and Decorating Goods**

4.58 Overall, 85 per cent of the expenditure on DIY and decorating goods of residents of the catchment area is spent in town centres, retail parks in the study catchment (see final column of Spreadsheet 7e); this is a high level of retention.

4.59 The main destinations for DIY and decorating expenditure within the catchment area are Longwell Green Retail Park (£51m), Cribbs Causeway Retail Park (£26m), B&Q at Yate (£20m), B&Q at Stoke Gifford (£9m). Together, these four locations/stores account for 74 per cent of expenditure from residents of the study catchment.
4.60 The total leakage for DIY and decorating goods amounts to 15 per cent of expenditure, with less than 1 per cent of leakage through SFT. The main leakage destinations for DIY and decorating goods are shown in Table 4.16.

**Table 4.16 Leakage Destinations for DIY and Decorating Goods**

<table>
<thead>
<tr>
<th>Towns Outside the Study Area &amp; Other Leakage Destinations</th>
<th>DIY &amp; Decorating Expenditure (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>B&amp;Q, Muller Road Branch: Horfield Bristol</td>
<td>£5m</td>
</tr>
<tr>
<td>Focus, Channons Hill, Fishponds, Bristol</td>
<td>£4m</td>
</tr>
<tr>
<td>Bristol City Centre/Broadmead/Cabot Circus</td>
<td>£3m</td>
</tr>
<tr>
<td>Fishponds Town Centre (Bristol)</td>
<td>£2m</td>
</tr>
<tr>
<td>Brislington Retail park, Bath Road, Brislington, Bristol</td>
<td>£1m</td>
</tr>
</tbody>
</table>


**Domestic Appliances**

4.61 Overall, 65 per cent of the expenditure on domestic appliances of residents of the catchment area is spent in town centres, retail parks and in freestanding stores which are located within the catchment area (see final column of Spreadsheet 7g); this is a modest level of retention.

4.62 The main destinations for expenditure on domestic appliances within the catchment area are Cribbs Causeway Retail Park (£71m), Longwell Green Retail Park (£33m), The Mall (£16m), Yate Town Centre (£6m) and Emersons Green (£6m).

4.63 A total of 21 per cent is leaked to other stores outside the study catchment; a further 13 per cent of domestic appliance purchases are attributed to SFT. The main leakage destinations for expenditure on domestic appliances are shown in Table 4.17.

**Table 4.17 Leakage Destinations for Domestic Appliances**

<table>
<thead>
<tr>
<th>Towns Outside the Study Area &amp; Other Leakage Destinations</th>
<th>Domestic Appliances Expenditure (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>SFT</td>
<td>£29m</td>
</tr>
<tr>
<td>Bristol City Centre/Broadmead/Cabot Circus</td>
<td>£16m</td>
</tr>
<tr>
<td>Fishponds, Bristol</td>
<td>£10m</td>
</tr>
<tr>
<td>Others - Outside Catchment Area</td>
<td>£8m</td>
</tr>
<tr>
<td>Avonmead, St Philips Causeway, St Philips Marsh, Bristol</td>
<td>£5m</td>
</tr>
</tbody>
</table>


**Specialist Comparison Items**

4.64 Overall, there is a 50 per cent aggregate retention rate for expenditure on specialist comparison goods in the catchment area (see final column of Spreadsheet 7i); this is a relatively low level of retention. Specialist comparison goods include purchases of jewellery, photographic goods, musical instruments or sports equipment.
The main destinations for expenditure on specialist comparison items within the catchment area are Cribbs Causeway Retail Park (£70m), The Mall (£59m), Yate Town Centre (£29m), Emersons Green (£25m), Kingswood (£10m) and Longwell Green Retail Park (£9m).

The main leakage destinations for expenditure on specialist comparison goods are shown in Table 4.18, which shows that SFT accounts for the highest leakage of expenditure on specialist goods items, followed by Bristol City Centre, other stores/settlements outside the catchment area, Bath City Centre, and overseas locations.

Table 4.18 Leakage Destinations for Specialist Comparison Items

<table>
<thead>
<tr>
<th>Towns Outside the Study Area &amp; Other Leakage Destinations</th>
<th>Domestic Appliances Expenditure (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Special Forms of Trading</td>
<td>£84m</td>
</tr>
<tr>
<td>Bristol City Centre/Broadmead/Cabot Circus</td>
<td>£80m</td>
</tr>
<tr>
<td>Others - Outside Catchment Area</td>
<td>£22m</td>
</tr>
<tr>
<td>Bath City Centre</td>
<td>£19m</td>
</tr>
<tr>
<td>Abroad/overseas</td>
<td>£16m</td>
</tr>
<tr>
<td>Brislington Retail park, Bath Rd, Brislington, Bristol</td>
<td>£6m</td>
</tr>
<tr>
<td>Fishponds (Bristol)</td>
<td>£4m</td>
</tr>
<tr>
<td>Avonmead, St Philips Causeway, St Phillips Marsh, Bristol</td>
<td>£3m</td>
</tr>
<tr>
<td>Chippenham</td>
<td>£2m</td>
</tr>
<tr>
<td>The Junction, Imperial Park, Wills Way, Hartcliffe, Bristol</td>
<td>£2m</td>
</tr>
<tr>
<td>Gloucester</td>
<td>£1m</td>
</tr>
</tbody>
</table>


Note: Cabot Circus at Bristol City Centre had just opened and full impact on trading patterns is not yet established.

Summary: Comparison Goods Sub-sectors

4.67 Table 4.19 presents a summary of retention and leakage for each of the five comparison goods sub-sectors. It is disappointing that the retention rate is fairly low for clothing and footwear (59 per cent) and for specialist items (50 per cent). Specialist furniture retailers located in the Bristol urban area account for significant leakage of expenditure in the furniture sub-category. This is an important piece of evidence which suggests a need to promote quality development, targeted at higher value middle and up-market comparison retailers.
Leisure Expenditure

4.68 Expenditure on leisure services\(^5\) varies greatly within the study area and reflects a number of interlinked circumstances such as age, family situation, leisure provision and disposable income. Overall, study area residents spend an average of £2,246 per annum, which is 5 per cent higher than the South West average (per head) and 3 per cent above the GB average. On a zone by zone basis, there is up to 30 per cent difference between the highest expenditure on leisure services (Zone 11, Bradley Stoke, £2,518) and the lowest (Zone 9, Henbury, £1,934). It is noted that expenditure over time on leisure services can be unpredictable and markets can change significantly - as is the case for bingo halls and bowling alleys.

4.69 The telephone survey of households included a number of questions that asked residents where they spent most money in relation to various types of leisure services, as follows:

- Restaurants and cafés
- Pubs, bars and nightclubs
- Cinemas
- Museums and art galleries
- Family entertainment centres (ie ten pin bowling, skating and so on)
- Health and fitness centres
- Bingo/casinos/bookmakers, and
- Theatres/concerts.

4.70 The most popular destinations for these different activities for residents of each survey zone, is set out in Table 4.20.

4.71 Bristol City Centre is the most popular destination for visits to restaurants and cafés on the part of the residents of Zones 5, 6, 7, 9 through to 17. The most popular destinations for residents of Zones 1 and 2 are their respective Thornbury and Wotton-under-Edge town centres. Zone 3 looks to Yate, Zone 4 looks to both Yate and Chipping Sodbury

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\(^5\) Note: leisure expenditure on leisure goods such as sports equipment, computer games and consoles etc is covered as a comparison goods expense.
equally and Zone 18 looks to Bath City Centre. These patterns reflect that the more distant zones from Bristol have a localised nature of visits to restaurants and cafés.

**Pubs, Bars and Nightclubs**

4.72 The survey indicates that 55 per cent of residents visit pubs, bars and nightclubs, while 45 per cent do not. Table 4.20 illustrates that the pattern is very localised, with many residents using their local centres for pubs, bars and nightclubs. Due to the concentration of bars and nightclubs in Bristol City Centre, the localised spending pattern would imply that residents primarily use pubs in their local zones.

**Cinemas**

4.73 Overall, Longwell Green attains the greatest market share for cinema visits across the study catchment. Generally residents in the south of the catchment will go to the Vue cinema at Aspects Leisure Park, Longwell Green. This also includes residents on the Bristol border who predominantly use Longwell Green in preference to the Showcase Cinema at Avonmeads Retail Park or Bristol’s City Centre cinemas. Residents in the north of the catchment use the Vue cinema at The Venue, Cribbs Causeway. The Electric Picture House independent cinema at Wotton-under-Edge secures a majority market share of 35 per cent from its local Zone 2 residents; however it attains a maximum share of 3 per cent from other adjacent zones, where residents tend to go to The Venue or Aspects Leisure Park instead.

**Museums & Art Galleries**

4.74 Around 56 per cent of respondents do not visit museums and art galleries, but for those that do, the only significant destination is Bristol City Centre. Central London attains the second highest share of 5 per cent.

**Family Entertainment Centres (Ten Pin Bowling, Skating etc)**

4.75 Fifty seven per cent of respondents claim not to visit family entertainment centres such as ten pin bowling alleys and skating rinks. However, Aspects Leisure Park at Longwell Green and The Venue at Cribbs Causeway are the dominant locations for such activities in all 18 survey zones. It is noted that respondents would have thought predominantly about ten pin bowling with regard to their favoured location choice.

**Health and Fitness Centres**

4.76 Sixty four per cent of respondents claim not to undertake health and fitness activities; however it is clear that local centres are the dominant location for residents. Kingswood also attains the largest market share for Zones 12, 13, 14 and 15.

**Bingo, Casinos and Bookmakers**

4.77 Ninety one per cent of respondents claim not to undertake activities which involve gambling, such as visits to bingo halls, casinos and bookmakers. Of those that do participate, Fishponds, which is just outside of the catchment area is the most important location. For zones further away from Fishponds, residents tend to use local facilities in their constituent zones, for example Thornbury for Zone 1 and Yate for Zone 3.
Theatres/Concerts

4.78 Forty per cent of respondents do not visit theatres or concert halls. However, of those that do participate, Bristol City Centre is by far the most important location, for residents of all zones in the catchment area.

Table 4.20 Most Popular Destinations for Expenditure on Leisure Services

<table>
<thead>
<tr>
<th>Survey Zone</th>
<th>Restaurants/Cafes</th>
<th>Bars/Clubs &amp; Pubs</th>
<th>Cinema</th>
<th>Museums &amp; Art Galleries</th>
<th>Family Entertainment</th>
<th>Health &amp; Fitness</th>
<th>Bingo, Casino &amp; B'maker</th>
<th>Theatre &amp; Concerts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Thornbury</td>
<td>Thornbury</td>
<td>The Venue (C.Caueway)</td>
<td>Bristol</td>
<td>The Venue (C.Caueway)</td>
<td>Thornbury</td>
<td>Thornbury</td>
<td>Bristol</td>
</tr>
<tr>
<td>2</td>
<td>Wotton-under-Edge</td>
<td>Wotton-under-Edge</td>
<td>Wotton-under-Edge</td>
<td>Bristol</td>
<td>The Venue (C.Caueway)</td>
<td>Dursley/Cam</td>
<td>Gloucester</td>
<td>Bristol</td>
</tr>
<tr>
<td>3</td>
<td>Yate</td>
<td>Longwell Green</td>
<td>Bristol</td>
<td>Longwell Green</td>
<td>Yate</td>
<td>Yate</td>
<td>Bristol</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Yate</td>
<td>Chipping Sodbury</td>
<td>Longwell Green</td>
<td>Bristol</td>
<td>Yate</td>
<td>Fishponds (Bristol)</td>
<td>Bristol</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Bristol</td>
<td>Bristol</td>
<td>The Venue (C.Caueway)</td>
<td>Bristol</td>
<td>The Venue (C.Caueway)</td>
<td>Bradley Stoke</td>
<td>Fishponds (Bristol)</td>
<td>Bristol</td>
</tr>
<tr>
<td>6</td>
<td>Bristol</td>
<td>Frampton Cotterell</td>
<td>Longwell Green</td>
<td>Bristol</td>
<td>Longwell Green &amp; The Venue (50:50)</td>
<td>Bradley Stoke</td>
<td>Fishponds (Bristol)</td>
<td>Bristol</td>
</tr>
<tr>
<td>7</td>
<td>Bristol</td>
<td>Bristol</td>
<td>Longwell Green</td>
<td>Bristol</td>
<td>Longwell Green</td>
<td>Longwell Green</td>
<td>Fishponds (Bristol)</td>
<td>Bristol</td>
</tr>
<tr>
<td>8</td>
<td>Bath</td>
<td>Pucklechurch</td>
<td>Longwell Green</td>
<td>Bristol</td>
<td>Longwell Green</td>
<td>Longwell Green</td>
<td>Bath</td>
<td>Bristol</td>
</tr>
<tr>
<td>9</td>
<td>Bristol</td>
<td>Bristol</td>
<td>The Venue (C.Caueway)</td>
<td>Bristol</td>
<td>The Venue (C.Caueway)</td>
<td>Zone 9 locations</td>
<td>Fishponds (Bristol)</td>
<td>Bristol</td>
</tr>
<tr>
<td>10</td>
<td>Bristol</td>
<td>Bristol</td>
<td>The Venue (C.Caueway)</td>
<td>Bristol</td>
<td>The Venue (C.Caueway)</td>
<td>Zone 10 locations</td>
<td>Fishponds (Bristol)</td>
<td>Bristol</td>
</tr>
<tr>
<td>11</td>
<td>Bristol</td>
<td>Bradley Stoke</td>
<td>The Venue (C.Caueway)</td>
<td>Bristol</td>
<td>The Venue (C.Caueway)</td>
<td>Bradley Stoke</td>
<td>Filton</td>
<td>Bristol</td>
</tr>
<tr>
<td>12</td>
<td>Bristol</td>
<td>Bristol</td>
<td>Longwell Green</td>
<td>Bristol</td>
<td>Longwell Green</td>
<td>Kingswood</td>
<td>Fishponds (Bristol)</td>
<td>Bristol</td>
</tr>
<tr>
<td>13</td>
<td>Bristol</td>
<td>Staple Hill</td>
<td>Longwell Green</td>
<td>Bristol</td>
<td>Longwell Green</td>
<td>Kingswood</td>
<td>Fishponds (Bristol)</td>
<td>Bristol</td>
</tr>
<tr>
<td>14</td>
<td>Bristol</td>
<td>Bristol</td>
<td>Longwell Green</td>
<td>Bristol</td>
<td>Longwell Green</td>
<td>Kingswood</td>
<td>Fishponds (Bristol)</td>
<td>Bristol</td>
</tr>
<tr>
<td>15</td>
<td>Bristol</td>
<td>Kingswood</td>
<td>Longwell Green</td>
<td>Bristol</td>
<td>Longwell Green</td>
<td>Kingswood</td>
<td>Fishponds (Bristol)</td>
<td>Bristol</td>
</tr>
<tr>
<td>16</td>
<td>Bristol</td>
<td>Bristol</td>
<td>Longwell Green</td>
<td>Bristol</td>
<td>Longwell Green</td>
<td>Longwell Green</td>
<td>Fishponds (Bristol)</td>
<td>Bristol</td>
</tr>
<tr>
<td>17</td>
<td>Bristol</td>
<td>Longwell Green &amp; Bristol (50:50)</td>
<td>Longwell Green</td>
<td>Bristol</td>
<td>Longwell Green</td>
<td>Longwell Green</td>
<td>Fishponds (Bristol)</td>
<td>Bristol</td>
</tr>
<tr>
<td>18</td>
<td>Keynsham</td>
<td>Keynsham</td>
<td>Longwell Green</td>
<td>Bristol</td>
<td>Longwell Green</td>
<td>Keynsham</td>
<td>Keynsham</td>
<td>Bristol</td>
</tr>
</tbody>
</table>
Summary of Retail & Leisure Spending Patterns

Convenience Goods Expenditure

Overall, 86 per cent of the convenience goods expenditure of residents in the overall catchment area is retained by town, district and local centres and freestanding stores located with the catchment area. Thus, as might be expected in the convenience sector, there is a minimal level of strategic leakage.

The household survey suggests that there is good provision and choice in the convenience goods sector. Thirteen large foodstores account for 68 per cent of the aggregate convenience goods expenditure of the residents in the study catchment. Leakage is primarily to two other foodstores just outside the study catchment boundary.

Seven of the 18 zones have a dominant foodstore which attains over 40 per cent of that zone's expenditure on convenience goods. The Tesco store in Thornbury (Zone 1), is the only unopposed dominant foodstore, i.e. there are no other foodstores which receive significant convenience expenditure by Zone 1 residents.

The ASDA at Longwell Green and Tesco at Thornbury both have very high localised market shares. Specifically, they both attain over 60 per cent of the convenience expenditure of residents in their constituent zones.

Certain stores in the study catchment have wide appeal and attract a significant portion of their turnover from other zones. These stores include:

- ASDA at Longwell Green
- Sainsbury’s at Emersons Green
- Tesco at Yate, and
- Morrisons at Yate.

However, there are three parts of the catchment area where there is a localised deficiency in convenience goods provision. For some zones such as Zone 10 (Filton) and Zone 14 (Speedwell) this is because of large foodstores that are nearby, but located in an adjacent zone. Chipping Sodbury’s Zone 4 retains only 10 per cent of localised convenience expenditure and although most of this is leaked to nearby stores in Yate (Zone 3), there could be scope for additional provision. Also, Hanham has a low localised retention rate (19 per cent), due to a lack of a large foodstore. The household survey shows that Hanham residents mainly travel to ASDA at Longwell Green in Zone 17, but also further afield to Tesco in Brislington (outside the study catchment) and to Sainsbury’s at Emersons Green (Zone 7).
Comparison Goods Expenditure

Overall, some 59 per cent of the comparison goods expenditure generated within the study catchment is retained by town centres, retail parks, and freestanding stores located within the catchment. The main destinations for comparison retailing within the catchment area are:

- Cribbs Causeway Retail Park, which secures £237m of the residents’ comparison goods expenditure
- The Mall, which secures £151m of the residents’ comparison goods expenditure
- Longwell Green Retail Park (£116m of the residents’ comparison goods expenditure)
- Yate Town Centre (£60m) and
- Emersons Green Town Centre (£39m).

Short-distance leakage to Bristol City Centre accounts for 14 per cent of the residents’ comparison goods expenditure (£179m), SFT leakage accounts for 11 per cent, or £147m.

The Mall and Cribbs Causeway Retail Park (taken collectively) is the only location to secure a comparison goods market share in excess of 40 per cent from any of the 18 study zones (considered to be a ‘dominant’ market share). The Mall and Cribbs Causeway Retail Park has a dominant market share in excess of 40 per cent for the following zones:

- Zone 1 - Thornbury
- Zone 5 - The Mall/Cribbs Causeway (its local zone)
- Zone 10 - Filton, and
- Zone 11 - Bradley Stoke

Spatially, these four zones are close to and adjacent to Zone 5 in which the Mall and Cribbs Causeway Retail Park is located. The Mall and Cribbs Causeway Retail Park also has a subsidiary influence on 10 other zones, whereby it secures a market share of between 10 and 40 percent.

There are 6 other centres/retail parks which have a subsidiary influence on study zones for comparison retailing, whereby they attain a market share of between 10 and 40 per cent from any one zone. These are:

- Thornbury, which has a subsidiary influence on its local Zone 1
- Yate, which has a subsidiary influence on its local Zone 3, plus, Zone 2, Zone 4 and Zone 6
- Bristol City Centre (outside the study catchment), which has a subsidiary influence on Zones 6, 9, 10, 12, 13, 14, 15, 16 and 17
- Bath City Centre (outside the study catchment), which has a subsidiary influence on Zones 8 and 18
- Longwell Green Retail Park, which has a subsidiary influence on its local Zone 16, plus Zones 7, 8, 13, 14, 15 and 17.
Sub Categories of Comparison Expenditure

The study also looks at comparison expenditure in 5 sub categories: clothing and footwear, furniture, DIY and decoration goods, domestic appliances and other specialist items (leisure goods etc). The table below shows the breakdown of total comparison expenditure in 2009 into the 5 categories.

<table>
<thead>
<tr>
<th>Expenditure Category</th>
<th>£m</th>
<th>Retention Rate</th>
<th>Leakage £m</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothing and Footwear</td>
<td>£300m</td>
<td>59%</td>
<td>123m</td>
</tr>
<tr>
<td>Furniture, Carpets, Soft Household Furnishings</td>
<td>£155m</td>
<td>48%</td>
<td>77m</td>
</tr>
<tr>
<td>DIY and Decorating Goods</td>
<td>£146m</td>
<td>85%</td>
<td>23m</td>
</tr>
<tr>
<td>Domestic Appliances</td>
<td>£222m</td>
<td>66%</td>
<td>77m</td>
</tr>
<tr>
<td>Other Specialist Items</td>
<td>£481m</td>
<td>50%</td>
<td>241m</td>
</tr>
<tr>
<td><strong>Total - All Comparison</strong></td>
<td><strong>£1,304m</strong></td>
<td><strong>59%</strong></td>
<td><strong>533m</strong></td>
</tr>
</tbody>
</table>


It is disappointing that the retention rates for clothing and footwear and other specialist items (such as jewellery, photographic items, sports equipment and musical instruments) are fairly modest, given that these are the highest value sectors of the sub categories.

Leisure Services Expenditure

Bristol City Centre is the most popular location for leisure expenditure on restaurants and cafes, the survey indicates a leakage of 21 per cent to Bristol. Other locations are also significant, especially in the east of the catchment. Spending patterns on pubs, bars and nightclubs in particular tend to be localised. Bristol marginally takes the largest market share, however, for many residents, pubs in their local zone form the primary location.

With regards to cinemas, the market share is split between the two Vue multiplexes at Aspects Leisure Park at Longwell Green and The Venue at Cribbs Causeway. Residents in the south of the catchment tend to use Aspects Leisure Park, whereas residents in the north will go to The Venue at Cribbs Causeway. Similarly spending patterns for family entertainment show that the bowling alleys at Aspects Leisure Park and The Venue are the favoured choices.

Bristol City Centre is the most important location for museums, art galleries and theatre visits. Central London secures the second highest market share.

Two-thirds do not participate in health and fitness, however for those that do, their local centres tend to receive the greatest market share. Kingswood is a popular location for residents on the east fringe of Bristol.

Ninety one per cent profess not to participate in bingo, casinos, lottery or betting. For those who do, the dominant location is Fishponds in Bristol, which is outside the catchment area.
5 QUANTITATIVE AND QUALITATIVE RETAIL NEED

Introduction

5.1 The report turns now to the assessment of the quantitative and qualitative need likely to arise in the retail sector for the period up to 2021 and, more indicatively, for the further period from 2021 to 2026. Longer term projections are more ‘indicative’ because of the exponential shape of the expenditure growth graph and because PPS4 enshrines the need to plan, monitor and manage. In undertaking the assessment of retail and leisure needs, we have followed the guidance set out in Policy EC1 of PPS4. We deal first with quantitative retail need.

Methodology for Assessing Quantitative Retail Need

5.2 The essential steps in the assessment of quantitative retail need are as follows:

- **Step 1**: establish an appropriate catchment area for the town centres being considered, which can be used as a study area for the assessment
- **Step 2**: assess the existing level of population and existing volume of retail expenditure of those resident within the study area, deducting an appropriate proportion for Special Forms of Trading (SFT)
- **Step 3**: apply forecasts of population change and per capita expenditure growth, in order to establish the overall level of projected growth in expenditure for residents of the study area
- **Step 4**: establish where the expenditure of the residents of the study area is currently spent, through use of an empirical survey of households resident in the study area (as discussed in Section 4), and thereby establish the proportion of expenditure which is currently retained by Town Centres and freestanding stores located within the borough – that is the current retention rate
- **Step 5**: make allowance for ‘claims’ on the growth in retained expenditure as a result of:
  - floorspace efficiency change (that is the growth in turnover for existing retailers within existing floorspace);
  - commitments to new floorspace (either schemes under construction or extant permissions that would result in additional retail floorspace)
- **Step 6**: make an allowance for under-trading or over-trading in the base year, if this is justified on the basis of circumstances identified by the Court of Appeal in its Kiddlington judgment (The First Secretary of State and Another and Sainsbury’s Supermarkets Ltd, 6 May 2005, Case No C3/2004/1658.)
- **Step 7**: calculate the initial residual expenditure pot which is potentially available for new retail floorspace under a constant market share scenario, based on steps 2-6 above and convert this expenditure to floorspace requirements
5.3 Our assessment of quantitative need is set out in the Spreadsheets 1-16 which are produced in full in the Volume 2 report. We refer to these tabulations within the text and where necessary draw out the main findings within tables within the report itself.

**Step 1: Definition of the study area**

5.4 The study area was defined on the basis of the approach described in Section 4 of the report, and split into 18 zones based on statistical ward area. All 18 zones are used as the study area for the comparison and convenience goods assessment. The component wards are listed at Spreadsheet 1 (Volume 2 Report).

**Step 2: Existing level of population and expenditure**

**Population**

5.5 The population for each zone is set out in Spreadsheet 2 (Volume 2). The population data has been provided by South Gloucestershire Council under two housing growth scenarios - one relating to the Draft RSS submission targets and a second scenario based upon the Secretary of State’s Proposed Changes RSS.

5.6 These scenarios have been chosen as they represent the highest and lowest of the housing growth scenarios that have been set out at the various stages of RSS production. The Council does not endorse either of these scenarios but recognises that, for the purpose of this study, both scenarios require to be tested.

5.7 In 2009, the study catchment population is 372,881, which includes survey areas inside Stroud District, Bristol City and Bath and North East Somerset (as set out in Spreadsheets 2 and 8, Volume 2). This population is projected to rise to 421,000 by 2026 under the lower growth scenario and to 443,000 by 2026 under the high growth scenario.

**Per capita expenditure**

5.8 The zonal per capita expenditure data is supplied by MapInfo for the year 2006, as set out in Spreadsheet 3 for comparison goods and in Spreadsheet 12 for convenience goods. The data is then rolled forward to the base year of 2009 as follows:

- **Comparison expenditure** is increased using 2 years of actual growth at 4.91 per cent\(^6\) per annum and 1 year of forecast growth at 1.805\(^7\) per cent per annum
- **Convenience expenditure** is increased using 2 years of actual growth at 2.2 per cent\(^8\) and 1 year of forecast growth at 0.23\(^9\) per cent per annum.

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\(^6\) Oxford Economics Retail Briefings Update, Revised Version March 2009.

\(^7\) This is the mid-point forecast comparison growth figure for the 2008-2016 period given by MapInfo and Experian. Sources: MapInfo Retail Spending Outlook Revised Version, March 2009 and the Experian Retail Planner Briefing Note 6.1 February 2009 Changes - Table 3.

\(^8\) Oxford Economics Retail Briefings Update, Revised Version March 2009.

\(^9\) Ibid - footnote 10. For convenience spend.
5.9 The total existing expenditure in 2009 is the product of the population and the per capita expenditure estimate for that zone. This is shown in Spreadsheets 4 and 13 for comparison and convenience expenditure respectively. It is necessary to exclude SFT from the expenditure as there is no requirement to provide retail floorspace for such purchases.

5.10 In excluding SFT, we have relied on the advice provided in Table 5.1 of Experian’s Retail Planner Briefing Note 6.1. However, in the convenience sector, we have halved the proportions of expenditure accounted for by SFT so as to reflect the fact that a proportion of the convenience goods bought over the internet are still supplied from shelves in supermarkets, rather than from distribution warehouses, as is more often the case in the comparison goods sector. Thus, in 2009 the total study area comparison spend is £1,156m excluding SFT and £634m for convenience spend.

**Step 3: Growth in expenditure and growth in retained expenditure**

5.11 The next steps are to apply forecasts of population change and per capita expenditure growth, in order to establish the overall level of projected growth in expenditure for all residents of the study area.

5.12 Population change for Scenario 2 is based on the higher growth scenario adopted for this study (RSS Proposed Changes), as set out in Spreadsheet 2 (Volume 2). The data on growth in per capita expenditure is as set out in Spreadsheet 3 for comparison goods and Spreadsheet 12 for convenience goods, utilising forecast per annum growth rates to 2011, 2016, 2021 and 2026.

5.13 Appendix 4 includes information on national retail trends and sets out the rationale for the expenditure growth rates. For comparison goods we adopt 1.8 per cent per annum to 2016, 5.9 per cent per annum from 2016 to 2021 and 4.3 per cent per annum from 2021 to 2026. For convenience goods we adopt 0.2 per cent per annum to 2016, 0.9 per cent per annum from 2016 to 2021 and 0.5 per cent per annum from 2021 to 2026. These growth rates are rounded.

5.14 As explained above, in excluding SFT, we have relied on the advice given in Table 5.1 of Experian’s Retail Planner Briefing Note 6.1. The deductions for SFT are set out in the following Table 5.1.

<table>
<thead>
<tr>
<th>Year</th>
<th>Comparison goods</th>
<th>Convenience goods</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Source</td>
<td>%</td>
</tr>
<tr>
<td>2009</td>
<td>11.3</td>
<td>NEMS household survey</td>
</tr>
<tr>
<td>2011</td>
<td>11.8</td>
<td>RTP Estimate⁴</td>
</tr>
<tr>
<td>2016</td>
<td>12.5</td>
<td>RTP Estimate</td>
</tr>
<tr>
<td>2021</td>
<td>12.5</td>
<td>RTP Estimate</td>
</tr>
</tbody>
</table>

⁴ Note: RTP Estimates for SFT are derived from Experian’s Retail Planner Briefing Note 6.1 (Table 5.1) but have been adjusted down to reflect their more recent reduced growth forecasts for expenditure - for which there was no accompanying revision for SFT growth.
The final row of Spreadsheet 4 (Volume 2) sets out the total growth in comparison goods expenditure up to 2026 of £1,359 million. Similarly the final row of Spreadsheet 12 (Volume 2) sets out the total growth in convenience goods expenditure up to 2026 of £166 million. For comparison goods, it is appreciated that this is a significant quantum of expenditure growth, thus sensitivity testing is undertaken in Step 8 of this process.

**Step 4: Current patterns of expenditure**

The next step is to use the household survey findings to establish current patterns of expenditure and the current retention rate for the study area, as already described in Section 4 of the report. Thus, the current retention rate for comparison goods is 59 per cent (£771m) and 86 per cent for convenience goods (£554m).

**Step 5: ‘Claims’ on growth in retained expenditure**

The next step is to make an allowance for ‘claims’ on the growth in retained expenditure. Having already allowed for the growth in SFT, as explained in paragraph 5.13 above. The remaining ‘claims’ are:

- Growth in floorspace efficiency, which is growth in the turnover of existing retailer floorspace, and
- An allowance for the turnover absorbed by planning commitments.

In making an allowance for growth in floorspace efficiency (Rows G and H of Spreadsheets 8 and 16), Experian derived recommendations are applied, as per Table 5.2 below:

**Table 5.2 Per annum floorspace efficiency growth**

<table>
<thead>
<tr>
<th>Year</th>
<th>Comparison</th>
<th>Convenience</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009-2016</td>
<td>0.68%</td>
<td>0.16%</td>
</tr>
<tr>
<td>2016-2021</td>
<td>2.20%</td>
<td>0.60%</td>
</tr>
<tr>
<td>2021-2026</td>
<td>1.60%</td>
<td>0.32%</td>
</tr>
</tbody>
</table>

Source: RTP assumptions derived from Experian.

The effect of the gain in floorspace efficiency of existing retailers amounts to a 'claim' of £204m in the comparison goods sector (Between 2009 and 2026). The corresponding effect in the convenience goods sector amounts to £33m.

The next step is to allow for the future turnover requirements of planning commitments, having made an assessment of how much of the commitments’ turnovers will be derived from residents of the study catchment area. The comparison and convenience goods commitments are scheduled in Table 5.3.

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11 A full explanation of the floorspace efficiency growth rates is given in Appendix 4.
5.21 The commitments amount to a ‘claim’ of £119m for comparison goods and £83m for convenience goods, which for the purposes of the assessment it is assumed to be completed by 2011.

### Table 5.3 Comparison and convenience retail commitments within the study area

#### Comparison commitments

<table>
<thead>
<tr>
<th>Store</th>
<th>Sq m net</th>
<th>Assumed Sales Density (£/sqm)</th>
<th>Benchmark Turnover £m</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tesco Mezzanine (comparison goods only) (1)</td>
<td>2,405</td>
<td>9,364</td>
<td>22.52</td>
</tr>
<tr>
<td>Tesco 3 small non-food units within the store</td>
<td>449</td>
<td>6,082</td>
<td>2.73</td>
</tr>
<tr>
<td>East Walk extension (4 non-food units)*</td>
<td>4,005</td>
<td>6,082</td>
<td>24.36</td>
</tr>
<tr>
<td>Bradley Stoke - Willow Brook</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-food retail units (x5)</td>
<td>5,575</td>
<td>6,082</td>
<td>33.91</td>
</tr>
<tr>
<td>Mall shopping units (x18)</td>
<td>2,971</td>
<td>6,082</td>
<td>18.07</td>
</tr>
<tr>
<td>Town Square units</td>
<td>914</td>
<td>6,082</td>
<td>5.56</td>
</tr>
<tr>
<td>Stoke Gifford</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sainsbury’s extension (comparison goods only) (1)</td>
<td>1669</td>
<td>7157.07</td>
<td>11.94</td>
</tr>
<tr>
<td>Total</td>
<td>17,988</td>
<td>N/A</td>
<td>119.09</td>
</tr>
</tbody>
</table>

#### Convenience commitments

<table>
<thead>
<tr>
<th>Store</th>
<th>sq m net</th>
<th>Assumed Sales Density (£/sqm)</th>
<th>Benchmark Turnover £m</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tesco Extension (convenience goods only) (1)</td>
<td>5,470</td>
<td>14,133</td>
<td>77.31</td>
</tr>
<tr>
<td>Stoke Gifford</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sainsbury’s extension (convenience goods only) (1)</td>
<td>556</td>
<td>10,770</td>
<td>5.99</td>
</tr>
<tr>
<td>Total</td>
<td>6,026</td>
<td>N/A</td>
<td>83.30</td>
</tr>
</tbody>
</table>

Notes:
Floorspaces are net additional where they apply to extensions to existing stores.
Source of assumed sales density
(1) Mintel Retail Rankings 2009 - converted to 2006 price bass, rolled forward to 2009 and including VAT.
(2) Experian average for in-town modern units - converted to 2006 price bass, rolled forward to 2009 and including VAT.

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5.22 We appreciate there is scope to account for overtrading within the assessment. In Policy EC1 in PPS4 refers to overtrading as a qualitative issue. We note that there is no mention in PPS4 of under trading, perhaps because there is no easy policy solution to this matter.

5.23 There have been a series of Secretary of State decisions and High Court decisions that have considered whether overtrading contributes to quantitative need. There is no clear guidance on this matter but the latest decisions indicate that whilst overtrading is a qualitative issue, it can be considered as a material input to the interpretation of whether

Roger Tym & Partners
M9318, February 2010
there is a quantitative need. In light of this uncertainty, we now consider overtrading as a separate matter and indicate its implications for capacity in South Gloucestershire.

Comparison Goods Sector

In order to assess whether there is any undertrading or over trading in the study area, we must assess the existing sales density (turnover per Sqm) of the floorspace and compare this with what would be expected of these centres given the composition of the retail provision and their position in the shopping hierarchy. Table 5.4 sets out the sales densities for the main comparison shopping destinations in the study area.

Table 5.4 Comparison goods sales densities in 2009 (descending order)

<table>
<thead>
<tr>
<th>Town Centre/Store</th>
<th>Net sales floorspace (sqm)</th>
<th>Actual turnover from study area (£m)</th>
<th>Average sales density (£ per sqm)</th>
<th>Experian average sales density (£ per sqm)</th>
<th>Experian benchmark category</th>
<th>Difference between the sales densities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filton Town Centre</td>
<td>1,703</td>
<td>21.30</td>
<td>12,506</td>
<td>3,717</td>
<td>Experian in-Town - Old</td>
<td>8,789</td>
</tr>
<tr>
<td>Emerson Green Town Centre</td>
<td>4,166</td>
<td>39.37</td>
<td>9,450</td>
<td>6,082</td>
<td>Experian in-Town - Modern</td>
<td>3,368</td>
</tr>
<tr>
<td>Yate Town Centre</td>
<td>10,428</td>
<td>59.81</td>
<td>5,736</td>
<td>3,717</td>
<td>Experian in-Town - Old</td>
<td>2,019</td>
</tr>
<tr>
<td>Cribbs Causeway Retail Park, Lysander Rd, Patchway</td>
<td>56,889</td>
<td>236.86</td>
<td>4,164</td>
<td>3,379</td>
<td>Experian Out-of-town - Modern</td>
<td>785</td>
</tr>
<tr>
<td>Staple Hill Town Centre</td>
<td>2,578</td>
<td>8.37</td>
<td>3,245</td>
<td>3,717</td>
<td>Experian in-Town - Old</td>
<td>-472</td>
</tr>
<tr>
<td>Thornbury Town Centre</td>
<td>3,713</td>
<td>11.37</td>
<td>3,063</td>
<td>3,717</td>
<td>Experian in-Town - Old</td>
<td>-654</td>
</tr>
<tr>
<td>Kingswood Town Centre</td>
<td>6,441</td>
<td>18.11</td>
<td>2,812</td>
<td>3,717</td>
<td>Experian in-Town - Old</td>
<td>-905</td>
</tr>
<tr>
<td>The Mall at Cribbs Causeway, Patchway, Bristol</td>
<td>64,979</td>
<td>150.77</td>
<td>2,320</td>
<td>3,379</td>
<td>Experian Out-of-town - Modern</td>
<td>-1,059</td>
</tr>
<tr>
<td>Chipping Sodbury Town Centre</td>
<td>1,352</td>
<td>3.00</td>
<td>2,222</td>
<td>3,717</td>
<td>Experian in-Town - Old</td>
<td>-1,495</td>
</tr>
<tr>
<td>Asda, Craven Way Longwell Green (comparison floorspace)</td>
<td>3,535</td>
<td>22.26</td>
<td>6,296</td>
<td>8,152</td>
<td>Experian Out-of-town - Modern</td>
<td>-1,856</td>
</tr>
<tr>
<td>Downend Town Centre</td>
<td>958</td>
<td>1.69</td>
<td>1,765</td>
<td>3,717</td>
<td>Experian in-Town - Old</td>
<td>-1,951</td>
</tr>
<tr>
<td>Hanham Town Centre</td>
<td>629</td>
<td>1.06</td>
<td>1,688</td>
<td>3,717</td>
<td>Experian in-Town - Old</td>
<td>-2,029</td>
</tr>
<tr>
<td>Asda Wal-Mart Supercentre, Highwood Lane, Patchway</td>
<td>3,679</td>
<td>5.35</td>
<td>1,455</td>
<td>8,152</td>
<td>Experian Out-of-town - Modern</td>
<td>-6,698</td>
</tr>
<tr>
<td>Willow Brook Tesco, Brook Way, Bradley Stoke (comparison floorspace)</td>
<td>2,844</td>
<td>5.82</td>
<td>2,046</td>
<td>9,364</td>
<td>Experian in-Town - Modern</td>
<td>-7,318</td>
</tr>
</tbody>
</table>

Net floorspace areas are sourced from the South Gloucestershire Retail Monitor (August 2008) with the exception of Bradley Stoke Town Centre, which is sourced from the Tesco Retail and Planning Statement submitted with their June 2005 planning application.

Table 5.4 contains a couple of anomalies and some areas in need of clarification. Filton Town Centre attains a vast average sales density of £13,709 per Sqm, this is clearly too...
high for small retail centre. It is believed that the market shares attributed to Filton Town Centre (1.6 per cent or £21m) includes expenditure which is actually spent at the nearby Abbeywood Retail Park where there are several large retail warehouses. The survey results for both Filton Town Centre and Abbeywood Retail Park are unclear.

5.26 Secondly, at the time of the survey Bradley Stoke Town Centre was under construction. However, the redeveloped Tesco store was trading. Thus in Table 5.4 the comparison floorspace for the Tesco store is assessed. The resulting sales density of £2,046 per Sqm is significantly below the company average for comparison goods. Although this is likely to be a true estimate of resident’s spending patterns at the time of the February 2009 telephone survey, it is unlikely to have taken account of the change in goods offer resulting from the enlarged Tesco store, which was formerly predominantly a convenience store. The impact of the new store on spending patterns will take some time to adjust; therefore the apparent undertrade should be treated with caution.

5.27 Lastly, Table 5.4 shows only the trade draw from residents in the study area. The Mall and Cribbs Causeway have a much larger catchment; their sales density will in fact be significantly higher. Despite this, Cribbs Causeway’s sales density (from study area residents only) is above the average that could be expected for an out-of-town retail park, illustrating its dominance on the study area.

5.28 Looking at overtrading destinations, the best performers are Emmer Green, Yate and Longwell Green Retail Park. Emmer Green appears to trade above Experian’s benchmark sales density for modern town centres and likewise Yate trades above the benchmark for older town centres.

5.29 The remaining stores and centres show undertrading in the comparison goods sector. It should be noted that CLG’s Good Practice Guidance acknowledges that household surveys have a tendency to overestimate the turnover of larger centres and retail parks at the expense of smaller centres. Despite this it is clear that these centres are undertrading in comparison to the applicable Experian benchmarks. However for smaller centres, which have experienced decline and competition from larger out-of-town locations and Bristol City Centre this is not unexpected. The ASDA Wal-Mart at Patchway is thought to draw from a slightly wider catchment; however its undertrade is more than expected. It may be that the household survey has not picked up the full extent of comparison purchases within the ASDA Wal-Mart foodstore.

5.30 Overall, when taking account of anomalies and giving consideration for the tendency to underestimate trade in smaller centres it is not thought that there is a significant over or undertrade in the comparison goods sector, it has been decided that no adjustments are necessary.

Convenience Goods Sector

5.31 The approach to the convenience goods expenditure is slightly different, because there is published data on the average (or benchmark) turnover for the main foodstore operators. For the stores that attract a notable market share, we have assessed the survey derived turnover against the benchmark, as summarised in Table 5.5.
The analysis set out in Table 5.5 reveals that 5 stores are trading substantially above their company averages, but across all stores, where some are undertrading the net result for the top 16 supermarkets is an overtrade of about £6m. There are a number of issues and anomalies that should be considered at this point, these are:

- Both the Morrisons and ASDA Wal-Mart at Cribbs Causeway show significant undertrading (-£14m and -£28m respectively) for stores of their size. The reasons for this could be two-fold. Both stores do not have a large immediate local catchment of residents, but on the other hand their placement adjacent to the regional shopping centre is such that their turnover may in reality be boosted by shoppers from outside the catchment. In addition there is a significant office sector at Aztec West which will use both stores for their convenience shopping.

- As already addressed above, the Tesco at Bradley Stoke (Willow Brook) has recently expanded significantly, but the expected change in shopping patterns will take longer. Therefore the undertrade is to be expected. It is thought that the Willow Brook Tesco will increase its turnover by drawing trade away from other supermarkets such as J Sainsbury’s (Stoke Gifford) and ASDA and Morrisons (Cribbs Causeway).

- The five best performing stores in relation to their benchmark turnovers are J Sainsbury’s in Emerson Green, ASDA in Longwell Green, Tesco in Yate, Tesco in Thornbury and Morrisons in Yate. All of these stores have strong local catchments and despite the two supermarkets in Yate they have limited immediate competition from other stores.

- If the Willow Brook Tesco, and ASDA and Morrisons at Cribbs Causeway are excluded from the list, there are relatively few poorly performing stores within the catchment. The only underperforming store of note is the J Sainsbury’s at Stoke Gifford. This is surprising, given that there is a planning commitment for an extension to the store.

Overall it is thought that once anomalies and issues have been excluded from the table there is likely to be some overtrade in the convenience goods sector. However given that individual stores do not necessarily trade at or in some cases even near to company averages and considering that over and undertrading is a qualitative issue, it is been decided not to make an allowance for overtrading in the assessment of floorspace requirements.
Table 5.5 Convenience sales densities in 2009

<table>
<thead>
<tr>
<th>Store Location</th>
<th>Location of Store (in, edge-of-centre or out-of-centre)</th>
<th>Net Sales Floorspace Sqm</th>
<th>% Conveniences Floorspace (4)</th>
<th>Convenience Sales Floorspace Sqm</th>
<th>Benchmark Sales Density (6) £/Sqm</th>
<th>Benchmark Turnover £m</th>
<th>Actual Turnover From Study Area £m</th>
<th>Over/under trading £m</th>
</tr>
</thead>
<tbody>
<tr>
<td>J Sainsbury, Emersons Green (2)</td>
<td>In Town</td>
<td>4,515</td>
<td>73%</td>
<td>3,307</td>
<td>10,361</td>
<td>34.3</td>
<td>59.6</td>
<td>25.3</td>
</tr>
<tr>
<td>Asda, Craven Way, Longwell Green (3)</td>
<td>Out of centre</td>
<td>8,035</td>
<td>54%</td>
<td>4,358</td>
<td>14,231</td>
<td>62.0</td>
<td>81.2</td>
<td>19.1</td>
</tr>
<tr>
<td>Tesco, 12 East Walk, Yate Shopping Prc, Yate (2)</td>
<td>In Town</td>
<td>2,794</td>
<td>64%</td>
<td>1,794</td>
<td>14,111</td>
<td>25.3</td>
<td>41.9</td>
<td>16.6</td>
</tr>
<tr>
<td>Tesco, Midland Way Thornbury (1)</td>
<td>Edge-of-centre</td>
<td>1,898</td>
<td>64%</td>
<td>1,219</td>
<td>14,111</td>
<td>17.2</td>
<td>32.5</td>
<td>15.3</td>
</tr>
<tr>
<td>Morrisons, Station Road, Yate (1)</td>
<td>Edge-of-centre</td>
<td>2,558</td>
<td>77%</td>
<td>1,966</td>
<td>11,948</td>
<td>23.5</td>
<td>36.5</td>
<td>13.0</td>
</tr>
<tr>
<td>Somerfield, Willows Shopping Centre, Downend (2)</td>
<td>In Town</td>
<td>1,440</td>
<td>82%</td>
<td>1,181</td>
<td>7,552</td>
<td>8.9</td>
<td>12.2</td>
<td>3.3</td>
</tr>
<tr>
<td>Lidl, High Street, Hanham (2)</td>
<td>In Town</td>
<td>750</td>
<td>78%</td>
<td>584</td>
<td>3,012</td>
<td>1.8</td>
<td>4.4</td>
<td>2.7</td>
</tr>
<tr>
<td>Morrisons, 668-718 Fishpools Road, Fishpools (1)</td>
<td>Out of centre</td>
<td>3,353</td>
<td>77%</td>
<td>2,576</td>
<td>11,948</td>
<td>30.8</td>
<td>31.4</td>
<td>0.7</td>
</tr>
<tr>
<td>Aldi, Horseshoe Lane St. Mary's Centre Thornbury (2)</td>
<td>In Town</td>
<td>1,419</td>
<td>75%</td>
<td>1,058</td>
<td>3,894</td>
<td>4.1</td>
<td>4.4</td>
<td>0.3</td>
</tr>
<tr>
<td>Somerfield, Broad Street, Staple Hill (2)</td>
<td>In Town</td>
<td>548</td>
<td>82%</td>
<td>450</td>
<td>7,552</td>
<td>3.4</td>
<td>3.2</td>
<td>-0.2</td>
</tr>
<tr>
<td>J Sainsbury, 13 Kings Chase Centre Regents Street, Kingswood (5)</td>
<td>In Town</td>
<td>1,765</td>
<td>73%</td>
<td>1,293</td>
<td>10,361</td>
<td>13.4</td>
<td>12.5</td>
<td>-0.9</td>
</tr>
<tr>
<td>Somerfield, Cecil Road, Kingswood (2)</td>
<td>In Town</td>
<td>1,456</td>
<td>82%</td>
<td>1,194</td>
<td>7,552</td>
<td>9.0</td>
<td>5.1</td>
<td>-3.9</td>
</tr>
<tr>
<td>J Sainsbury, Fox Den Road, Stoke Gifford (1)</td>
<td>Out of centre</td>
<td>4,698</td>
<td>73%</td>
<td>3,441</td>
<td>10,361</td>
<td>15.7</td>
<td>27.4</td>
<td>-8.2</td>
</tr>
<tr>
<td>Morrisons, Lysander Road Cribbs Causeway (2)</td>
<td>Out of centre</td>
<td>3,383</td>
<td>77%</td>
<td>2,599</td>
<td>11,948</td>
<td>31.1</td>
<td>16.7</td>
<td>-14.4</td>
</tr>
<tr>
<td>Asda Wal-Mart Supercentre, Highwood Lane, Patchway (2)</td>
<td>Out of centre</td>
<td>8,361</td>
<td>54%</td>
<td>4,535</td>
<td>14,231</td>
<td>64.5</td>
<td>36.8</td>
<td>-27.7</td>
</tr>
<tr>
<td>Tesco, Brook Way, Bradley Stoke (3)</td>
<td>In Town</td>
<td>7,900</td>
<td>64%</td>
<td>5,072</td>
<td>14,111</td>
<td>71.6</td>
<td>36.6</td>
<td>-35.0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>n/a</strong></td>
<td><strong>54,873</strong></td>
<td><strong>n/a</strong></td>
<td><strong>36,625</strong></td>
<td><strong>436.5</strong></td>
<td><strong>442.4</strong></td>
<td><strong>5.9</strong></td>
<td></td>
</tr>
</tbody>
</table>

Notes:
(1) Floorspace data from IGD Foodstores Database (2008). This excludes small stores that fall within the convenience category and would be picked up as 'other' within the household survey.
(2) Floorspace data from the South Gloucestershire Council Town/District and Retail Monitor (August 2008)
(3) Floorspace data from the foodstore’s planning application documents.
(4) Percentage of convenience sales area of all foodstores are company averages provided by Mintel's Retail Rankings 2008. MapInfo definition of ‘convenience expenditure’ used to inform floorspace splits.
(5) This is the convenience floorspace in the stores using the percentage calculated at (4).
(6) Average Sales Density is provided by Mintel Retail Rankings (2008)/RTP Estimates and has been adjusted to a pure convenience goods average to reflect the goods basis approach. All sales densities have been adjusted to 2009 prices and include VAT.
(7) Product of convenience floorspace and average sales density.
Step 7: Residual expenditure potentially available for new retail floorspace

5.34 Thus, having allowed for all of the claims on the growth in retained expenditure - that is, growth over time in SFT, growth in floorspace efficiency and commitments, this leaves a residual expenditure which can be converted into a floorspace requirement. In order to convert the residual expenditure into a net sales area in square metres we apply an average sales density for comparison goods of £6,082 per Sqm and an average sales density for convenience goods of £10,000 per Sqm sales area.

5.35 Finally, we convert the sales area requirement to a gross floorspace requirement using a net to gross ratio of 70 per cent for comparison goods and 65 per cent for convenience goods, which is higher than comparison goods on the basis that foodstores need more storage space than comparison outlets.

Step 8: Scenario testing and sensitivity assessment

Demographic projection scenarios

5.36 The study sets out the requirement to consider future retail floorspace needs based upon two housing growth scenarios, which are:

- Scenario 1 - Lower end of range, RSS Submission (growth of 48,600 people from 2009 to 2026)
- Scenario 2 - Higher end of supply, RSS Secretary of State Proposed Changes (growth of 70,000 people from 2009 to 2026). Main scenario used for assessment and reporting.

5.37 The floorspace requirement for comparison and convenience goods under each population scenario is set out in the following sections.

Changes to the retention levels of the study area

5.38 Given that this is the first telephone survey regarding the shopping patterns of residents in South Gloucestershire; it is not possible to ascertain whether there has been much change in patterns over recent years by benchmarking against a previous survey.

5.39 The survey revealed an aggregate retention rate for comparison goods of 59 per cent - that is, the percentage of available expenditure within the study area which is spent in stores, retail parks and town centres within the study area. However the survey may not account fully for the potential change in shopping patterns resulting from the Cabot Circus retail development in Bristol City Centre, which had only been trading for two months at the time of the survey. As the population scenarios indicate above, South Gloucestershire is planning for growth which will increase the study area’s available expenditure. However, it is unlikely that the pattern of expenditure will change significantly. There may be a slight reduction in the study area’s retention rate as a result of the new improved offer in Bristol; however it is difficult to assess what the level of impact will be. Future survey work would be required to gain a better understanding. Cribbs Causeway and The Mall are likely to remain the

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dominant comparison shopping destinations for residents within the study area and in this respect there is no sensitivity test to allow for changes to the retention rate.

5.40 The aggregate level of retention in the convenience sector is already very high, averaging 86 per cent for the catchment as a whole with 8 of the 18 zones attaining retention rates of over 90 per cent. In this respect there is no case to increase or decrease the retention level for the convenience sector.

Increase or decrease in the geographical size of the catchment area

5.41 **Comparison goods sector** - While the scenarios indicate growth to the northern and eastern fringes of Bristol (within South Gloucestershire), it is felt the size of the retail catchment will not expand significantly, partly due to the competing catchment boundaries for Bristol and Bath which limit the influence of stores and centres in the study area. While Cribbs Causeway and The Mall do have a much wider catchment, it is not within the remit of this study to assess this.

5.42 **Convenience goods sector** - PPS4 seeks to ensure that people’s every day needs, such as convenience shopping, are met on as localised a basis as possible. As a consequence, the overall catchment area is defined, primarily, on the basis of comparison goods spending patterns, where the very existence of the retail hierarchy demands that people travel to higher order centres for their higher order goods and services.

5.43 As a result it is not necessary to make any adjustments to the size of the catchment area.

Inflow of expenditure from residents outside the study area

5.44 There will be an element of inflow from the Bristol administrative area into the South Gloucestershire study area, mainly to ‘border base’ supermarkets, the retail park at Longwell Green and most significantly to Cribbs Causeway and The Mall. Unfortunately, it is not possible to assess from the Bristol Retail Study (2007) the market share or level of expenditure which is leaked to South Gloucestershire. Whilst this information is likely to exist in a raw data format it is not presented in the analysis or appendices.

5.45 However, given that there are no plans to see an expansion in the quantum of retail floorspace at Cribbs Causeway/The Mall and in accordance with PPS4, which promotes a town centre first approach, it has not been decided not to make an allowance for inflow.

**Findings in relation to quantitative retail need**

**Comparison goods sector**

5.46 The quantitative comparison goods retail need for each population scenario (at a static retention rate) is summarised in Table 5.6 below (also set out in detail in Spreadsheet 8).

<table>
<thead>
<tr>
<th>Pop Scenario 1 (low: Draft RSS)</th>
<th>2009-11</th>
<th>2011-16</th>
<th>2016-21</th>
<th>2021-26</th>
<th>Change 09-26</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>0</td>
<td>31,363</td>
<td>34,172</td>
<td>65,534</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Pop Scenario 2 (high: RSS Prop Changes)</th>
<th>2009-11</th>
<th>2011-16</th>
<th>2016-21</th>
<th>2021-26</th>
<th>Change 09-26</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>0</td>
<td>36,540</td>
<td>40,351</td>
<td>76,891</td>
</tr>
</tbody>
</table>
5.47 For scenario 2 (RSS Proposed Changes levels of population growth), the tables show that there is a significant requirement for comparison floorspace to the period 2026. After 2016, there is a sharp increase in floorspace requirements, which is a function of the compound effect of per capita expenditure growth over this timeframe, combined with population growth.

5.48 However, the shorter term requirements identify a negative residual requirement for comparison goods floorspace to 2011. This is due to a number of committed planning applications (with an assumed implementation by 2011) which will lead to an oversupply of floorspace; the estimated store turnovers of the commitments will exceed the growth in available comparison goods expenditure in the coming years. Thus when taking into account the initial negative requirement of -14,935 Sqm there will still be a net negative requirement for -2,001 Sqm of net floorspace by 2016. This is better shown in Figure 5.1 below, whereby the level of expenditure growth is forecast to recover from 2016. Under both population scenarios the growth in expenditure post 2016 will result in surplus capacity.

Figure 5.1 Expenditure capacity for comparison goods

5.50 Table 5.7 identifies a range of need for additional convenience floorspace within the timeframe to 2026. Figure 5.2 illustrates that the committed floorspace (Tesco at Yate and
Sainsbury’s at Stoke Gifford) will result in a rapid uplift in benchmark store turnover which will lead to an oversupply of floorspace based upon current and future expenditure availability. Thus under the higher growth population scenario there will be an equilibrium between benchmark turnovers and available spend at around 2021.

**Figure 5.2 Expenditure capacity for convenience goods**

Qualitative Retail Need

5.51 Policy EC1.4 (d) of PPS4 provides advice on the considerations LPAs should take into account in assessing qualitative needs in their development plan documents. It states that there should be genuine choice to meet the needs of the whole community.

**Comparison Goods Sector**

5.52 In the comparison goods sector, we note the strong performance of Cribbs Causeway, which is the main comparison goods destination within the study area. The centre is currently trading healthily and succeeds in attracting a significant trade draw from the South West and Midlands area. Outside the study area, Bristol City Centre’s comparison offer has been significantly enhanced by the opening of the Cabot Circus development, which is set to bring Bristol into the top ten of shopping destinations in the UK. Bath, although lower in the retail rankings than Bristol, offers a less mainstream range of comparison shopping which caters for both tourists and high quality shopping requirements in the area.

5.53 The town and district centres in South Gloucestershire do not operate within the same markets as either Bristol and Bath city centres or Cribbs Causeway, but rather they serve a more local catchment. The qualitative need within these centres does differ according to their relative size and location.
Kingswood is traditionally considered as the main centre in the east Bristol fringe. Although there are a large number of retail units, in comparison with other centres in South Gloucestershire, there is a lack of variety within the comparison offer. There is a limited multiple offer and those national retailers which are present are nearly all lower order. The remaining stores are dominated by discount retailers.

Outside of the Bristol fringe, Yate is the largest of the town centres. Its retail offer is broader than that of Kingswood, which is probably due to its shopping area being purpose built, offering larger units in a more pedestrian friendly environment. Like Kingswood the multiples present are representative of the low to middle order stores, rather than for example higher end fashion outlets.

This observation is reflected in the town centres’ relative position in Management Horizons Europe’s (MHE) Shopping Index. We have noted, in Appendix 2 that both Kingswood and Yate town centres achieves only a ‘middle’ rating for fashion in MHE’s Shopping Index. In part, this ‘middle’ ranking reflects the complete absence in both town centres of the high profile retailers listed in Table 2.1. In contrast Bristol City Centre secures representation from 17 of these retailers, and Cribbs Causeway has secured representation by 9 of these retailers.

Table 2.1 High Profile Representation from the top 95 Multiple Retailers

<table>
<thead>
<tr>
<th></th>
<th>Bristol City Centre</th>
<th>Cribbs Causeway</th>
<th>Kingswood Town Centre</th>
<th>Yate Town Centre</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total stores</td>
<td>17</td>
<td>9</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>(fashion stores &amp;</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>department stores)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

It is locally considered that Kingswood has traditionally been the focus for retail development and that increasing the quality of the offer would be desirable. This may be achieved by improving and expanding the existing floorspace within the centre to improve the attractiveness of the centre as an investment location and potentially attract interest from national retailers. However, given the relatively subdued level of comparison multiple retailer interest in the town at present, we would not anticipate large-scale uplift in multiple retailer interest, given its relatively small size and proximity to larger, higher-order centres.

Yate offers potential for expansion in its comparison offer. As noted in the performance analysis section there is demand from retailers to locate in Yate. If Yate is to continue to succeed to provide choice and variety then it may need to expand its comparison retail offer, particularly if it is to meet the needs of a growing community under the higher RSS growth scenario.

Thornbury is the next largest centre, however its proximity and ease of access to Cribbs Causeway (approximately 20 minute drive time) and to a lesser extent Yate, means that it is unlikely to be able to directly compete with the offer at these locations. The situation is similar in Chipping Sodbury, where proximity to the higher order centre at Yate, means it is unlikely to be able to directly compete.
5.60 As such, in both these locations (Thornbury and Chipping Sodbury) enhancement of the comparison offer to provide a ‘boutique’ shopping environment (which complements rather than competes with Cribbs Causeway and Yate) is a direction which could potentially be explored. Alternately or in addition a focus on the quality leisure and evening economy may also provide a complementary offer to the higher order retail centres. Any additional comparison retail development which comes forward in either of these town centres should be of a scale appropriate to the size and role of the town centre.

5.61 Outside of these areas, the other centres located in the Bristol urban fringe largely cater for the local needs of their population and are unlikely to require further comparison floorspace, but may need policy protection for existing retail frontages to maintain the current provision. The exception is Emerson Green where there is scope to develop further under the RSS growth scenarios and that of the South Gloucestershire Local Plan.

**Convenience Sector**

5.62 In the convenience sector, it is clearly important that needs are met on as localised a basis as possible - an important part of the LDF process is to remedy deficiencies in the network of centres (Policy EC3.1b).

5.63 With reference to Figure 5.3, which shows the locations of supermarkets and smaller convenience stores within the study area it can be observed through this and consideration of the localised retention rates for each zone that there is generally a good level of provision and choice in the convenience goods sector. As described in Section 4 (spending patterns) there are a number of dominant stores which attain large market shares, but also have wide appeal (people travel to them from other zones). The dominant larger foodstores, such as ASDA in Longwell Green, Sainsbury’s in Emersons Green are a product of contemporary shopping patterns whereby choice and range within one store is vast. It also helps that these stores are very accessible to a large catchment of shoppers.

5.64 The two areas where qualitative need is greatest are Chipping Sodbury and Hanham. With regard to Chipping Sodbury, 78 per cent of the zone’s expenditure is directed to adjacent supermarkets in Yate; therefore while there is an element of need, the supermarkets in Yate are relatively nearby. The shopping patterns for Hanham’s Zone16 show that residents travel to a variety of different foodstores, but only 19 per cent is spent in Zone 16 itself with leakage of a further 45 per cent to other stores in the study area (Asda at Longwell Green; Sainsbury’s at Kingswood; Sainsbury’s at Emerson Green). A further 35 per cent is leaked to foodstores outside the study area, mainly Tesco, in Brislington and Sainsbury’s on Bloomfield Road, Bristol. Thus need is greatest in this area of South Gloucestershire.

5.65 Another qualitative consideration in the convenience goods sector is to seek to ensure easy access to local facilities on the part of the most deprived residents in the District. In Figure 5.4 we have superimposed the superstores, supermarkets and small convenience stores, on a map of the Index of Multiple Deprivation across the study area. Thus, there is just one super-output area (SOAs) in South Gloucestershire which falls within the 20 per cent most deprived in England. This SOA is at Staple Hill, for which the SOA ranking is among the 17 per cent most deprived in England.
Staple Hill has three supermarket foodstores in the town centre; an Iceland; Somerfield and Co-op, plus local independents. Although the quality of the produce offer is likely to be more at the lower end compared to other convenience operators there is deemed to be a good level of local provision and choice for residents.
Figure 5.3 Foodstores within the study area
Figure 5.4 Freestanding food stores and areas of deprivation (IMD), relative to all super output areas (SOAs) in England

Food and Grocery Provision in the Most Deprived Areas of South Gloucestershire

- Study Centres
- Local Authority Boundary
- ONS Urban Areas

Supermarkets/Foodstores within S. Glos
- Supermarket/Hypermarket (23)
- Small Convenience Store (14)

Index of Multiple Deprivation 2007 (compared to all SOAs in England)
- 0 to 20% Most Deprived
- 20 to 40% Most Deprived
- All other SOAs (40-100% less deprived)

Digital Map Data © Collins Bartholomew Ltd., 2008
Summary: Quantitative and Qualitative Retail Need

**Comparison goods sector**

- The need assessment includes an additional turnover of £119m from planning permissions for new stores which will come forward in the next two years. Although Emersons Green, Yate, Cribbs Causeway and Longwell Green Retail Park are thought to overtrade compared to the benchmarks, the rest of the smaller town centres in the study area undertrade: no allowance is made for over or undertrading.
- Overall there is an **initial negative requirement of -14,935 Sqm net at 2011**. This is due to factoring in numerous commitments which will absorb more than the available amount of expenditure, thus there will be an oversupply once commitments are built out.
- When taking into account the initial negative requirement of -14,935 Sqm (net) there will still be an oversupply by 2016.
- Retail expenditure growth is thought to recover from 2016 onwards and thus there is an increase in the amount of expenditure to support new retail space. Between 2016 and 2021 will there be sufficient expenditure growth to support somewhere in the region of 39,000 Sqm of net additional floorspace.
- **In total there is a need for between 66,000 and 77,000 Sqm net between 2009 and 2026** depending upon population growth (Scenario 1 or 2). However we would caution against looking ahead of 2021, where the expenditure estimates rapidly amplify due to the compound growth of per capita increases in spending.

**Convenience Goods Sector**

- For convenience goods there is also a ‘claim’ on expenditure of £83m for the committed Sainsbury’s extension at Stoke Gifford and redeveloped Tesco at Yate. In light of uncertainty with regard to over and undertrading of the areas foodstores, no allowance is make for overtrading.
- There is an initial **negative requirement of -7,561 Sqm net** in the first two years up to 2011. Thereafter the requirement to 2026 is between 184 and 3,753 Sqm net (depending upon population growth). Once the convenience commitments are built out there will be limited quantitative need for new provision in the medium term to 2016.
- In order to increase the level of need in the convenience goods sector it would be necessary to improve the retention rate. At 86 per centre for the whole study area this would be difficult to achieve especially around the east fringe of Bristol where shopping catchments overlap.
- However, the two scenarios indicate significant levels of growth around the North and East Fringes of Bristol. It will be important to ensure provision is maintained during the Development Plan period, especially where extensions or new settlements will create localised demand for convenience goods.
The assessment acknowledges a qualitative need for greater provision at Chipping Sodbury and Hanham to address the poor localised shopping patterns for convenience retailing.
6 ASSESSMENT OF SCOPE FOR ADDITIONAL COMMERCIAL LEISURE, CULTURAL AND OFFICE PROVISION

Forecast Increases in Leisure Expenditure

6.1 The approach to the assessment of quantitative need in the leisure sector is less well developed than in the retail sector. Furthermore, development in the leisure sector has historically been very market-led, and it is only recently that leisure has been brought into the range of uses covered by the sequential approach.

6.2 However MapInfo produce expenditure data for leisure spend at Census Output Area level. The data is aggregated into the study catchment expenditure zones in the same way as the retail expenditure data. Leisure expenditure is divided into two separate areas, one is 'leisure goods' and the other 'leisure services'. For the purposes of this section we look only at leisure services as expenditure on leisure goods, such as sports equipment etc has been covered by Section 4 (comparison items).

The Distribution of Leisure Expenditure

6.3 MapInfo supplies information on per capita leisure spending in COICOP (Classification of Individual Consumption by Purpose) categories and the data for the South Gloucestershire catchment area is set out in Table 6.1 below.

Caveat Note on the use of Leisure Expenditure in the COICOP Sub Categories

6.4 It is important to note that the zonal per capita expenditure data for the study catchment is only broken down into four COICOP categories which are: Recreation and cultural services (COICOP category 9.4); restaurants, cafes etc (11.1), accommodation services (11.2) and hairdressing and personal grooming (12.1). In order to provide an indicative estimate of expenditure for the sub categories below, such as cinemas and games of chance we disaggregate the data using average UK percentage splits.

6.5 For example in 2009 there is an expenditure of £623m on ‘recreation and cultural services’ in the overall study catchment area. In order to estimate the portion of this expenditure that is spent on cinema admissions we take the national percentage, which is 2.3 per cent of this sub category. Applying this gives an expenditure of £14.3m on cinema admissions, as detailed in Table 6.1 below.

6.6 Table 6.1 shows that COICOP category 11.1.1 ‘restaurants, cafes, bars etc’ accounts for just over half of the average per capita spend on leisure services. Taken as one, ‘cultural services’ is the second highest category with ‘accommodation services’ (hotels, B&Bs etc) and ‘other cultural services’ the third and fourth highest categories, accounting for 11 per

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13 09.4.2.4 Other cultural services includes services of musicians and performers, services of photographers and print processing services.
cent and 9 per cent of spending on leisure services respectively. Furthermore, commercially-orientated property developments such as cinemas, account for only a small fraction of total leisure expenditure (0.6 per cent). Within the ‘games of chance’ category it is thought that betting accounts for the largest proportion of spend with relatively little residual for bingo halls and casinos.

Table 6.1: Breakdown of average per capita leisure spend in the South Gloucestershire study area

<table>
<thead>
<tr>
<th>COICOP Categories</th>
<th>Description</th>
<th>Per Capita (£)</th>
<th>% of Total Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.4.1</td>
<td>Recreation and sporting services</td>
<td>127.0</td>
<td>5.7%</td>
</tr>
<tr>
<td>9.4.2</td>
<td>Cultural Services</td>
<td>277.8</td>
<td>12.4%</td>
</tr>
<tr>
<td>9.4.2(pt)</td>
<td>Cinema admissions (sub part of cultural services)</td>
<td>14.3</td>
<td>0.6%</td>
</tr>
<tr>
<td>9.4.2(pt)</td>
<td>Theatre admissions (sub part of cultural services)</td>
<td>33.2</td>
<td>1.5%</td>
</tr>
<tr>
<td>9.4.2(pt)</td>
<td>Television and video rentals (sub part of cultural services)</td>
<td>15.3</td>
<td>0.7%</td>
</tr>
<tr>
<td>9.4.2(pt)</td>
<td>Social subscriptions (sub part of cultural services)</td>
<td>16.7</td>
<td>0.7%</td>
</tr>
<tr>
<td>9.4.2(pt)</td>
<td>Photographic processing (sub part of cultural services)</td>
<td>24.3</td>
<td>1.1%</td>
</tr>
<tr>
<td>9.4.2(pt)</td>
<td>Other (sub part of cultural services)</td>
<td>174.1</td>
<td>7.8%</td>
</tr>
<tr>
<td>09.4.3</td>
<td>Games of chance</td>
<td>218.6</td>
<td>9.7%</td>
</tr>
<tr>
<td>11.1.1</td>
<td>Restaurants, Cafes, bars Etc</td>
<td>1,140.4</td>
<td>50.8%</td>
</tr>
<tr>
<td>11.1.2</td>
<td>Canteens</td>
<td>140.5</td>
<td>6.3%</td>
</tr>
<tr>
<td>11.2</td>
<td>Accommodation Services</td>
<td>239.7</td>
<td>10.7%</td>
</tr>
<tr>
<td>12.1.1</td>
<td>Hairdressing Salons &amp; personal grooming establishments</td>
<td>101.6</td>
<td>4.5%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>Leisure Services</strong></td>
<td><strong>2,245.6</strong></td>
<td><strong>100.0%</strong></td>
</tr>
</tbody>
</table>

Notes: 9.4.2 (pt) are sub categories of 9.4.2 (Cultural Services) and therefore in total account for 12.4% of leisure services expenditure.

**Current and Future Leisure Expenditure**

Having considered the structure of leisure spend, our next step in the assessment is to calculate the growth in leisure spend for residents in the study catchment area in the period 2009 to 2026. The projected growth in expenditure on leisure services is set out in Table 6.2 below, using Experian’s recommended growth rate for spending on leisure services of 0.8 per cent, per capita, per annum for the period 2009-2016\(^\text{14}\). This can also be seen in greater detail in Spreadsheet 20 Volume 2 which provides the projections for population, per capita expenditure and the overall leisure goods spend for residents across the entire study catchment area (zones 1 to 18). Although the expenditure

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\(^{14}\) Experian *Retail Planner Briefing Note 6.1* (October 2008), Table 3.2 (EBS forecast for ‘leisure services’). Experian’s forecasts do not go beyond 2016; in the absence of any better information we have therefore also applied the 0.8 per cent, per annum forecast growth rate to the post-2016 period.
projections have been forwarded to 2026 for completeness, we caution against looking beyond 2021 when planning for commercial leisure needs.

Table 6.2 Growth in Leisure Expenditure (in £m) 2009-2026 (all Zones)

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Recreational &amp; cultural services (£m)</td>
<td>232.5</td>
<td>239.0</td>
<td>259.4</td>
<td>287.1</td>
<td>316.5</td>
<td>6.5</td>
<td>20.4</td>
<td>27.8</td>
<td>29.4</td>
</tr>
<tr>
<td>Restaurants, cafes &amp; canteens (£m)</td>
<td>477.6</td>
<td>491.0</td>
<td>532.8</td>
<td>589.9</td>
<td>650.4</td>
<td>13.4</td>
<td>41.8</td>
<td>57.2</td>
<td>60.5</td>
</tr>
<tr>
<td>Hotels (£m)</td>
<td>89.4</td>
<td>91.9</td>
<td>99.7</td>
<td>110.4</td>
<td>121.7</td>
<td>2.5</td>
<td>7.8</td>
<td>10.7</td>
<td>11.3</td>
</tr>
<tr>
<td>Hairdressing &amp; personal grooming (£m)</td>
<td>37.9</td>
<td>39.0</td>
<td>42.3</td>
<td>46.8</td>
<td>51.6</td>
<td>1.1</td>
<td>3.3</td>
<td>4.5</td>
<td>4.8</td>
</tr>
<tr>
<td>Total (£m)</td>
<td>837.4</td>
<td>860.8</td>
<td>934.1</td>
<td>1,034.2</td>
<td>1,140.2</td>
<td>23.5</td>
<td>73.3</td>
<td>100.1</td>
<td>105.9</td>
</tr>
</tbody>
</table>

6.8 Our assessment is focused on the current provision and capacity for additional growth within the local authority boundary based upon available expenditure from the study area - that is, survey zones 1 to 18. Capacity estimates also give consideration to nearby leisure facilities situated in Bristol.

6.9 In absolute terms, leisure services expenditure will grow by £196.9m (or 24 per cent) between 2009 and 2021. This far exceeds the projected population growth of 12 per cent\(^\text{15}\). £100.0m, or 57 per cent of this growth will be absorbed by the restaurant, cafes, bar and canteens sub sector. Within the ‘recreation and cultural services’ sub category, the growth that could be absorbed for cinemas, theatres and games of chance is given below:

- Cinema expenditure will grow from £5.33m in 2009 to £6.59m in 2021 (a growth of £1.3m)
- Theatre expenditure can expect to grow from £12.38m to £15.29 (growth of £2.9m)
- Games of Chance can expect to grow from £81.52m to £100.69m (growth of £19.2m

Conversion of Expenditure Increases to Additional Leisure ‘Requirements’

Cinemas

6.10 South Gloucestershire has two multiplex cinemas, both of which are located on retail parks on the western side of the authority. Both are operated by Vue, one from The Venue, Cribbs Causeway (12 screens) and the other from the Aspect’s Leisure Park at Longwell Green (13 screens). None of the traditional district centres within South Gloucestershire offer any cinema provision. There are a further seven cinemas in Bristol and a small single screened village cinema at Wotton-under-Edge to the north, which is inside the study catchment (Zone 2).

6.11 Data from Dodona research suggests that the average multiplex screen would take an average turnover of £310,000 per screen (per annum), whereas an independent would

\(^{15}\) Higher population growth scenario based upon the Secretary of State’s Proposed Changes RSS
take around £148,000 per screen. Thus the increase in cinema expenditure of £1.3m to 2021 could support roughly four screens in a multiplex format, or say, three multiplex screens and two independents.

6.12 However it is not sufficient to simply convert the potential growth in cinema revenue to a notional requirement for screens. Operators also look at screen density in terms of the number of screens per 100,000 population\textsuperscript{16} within an appropriate driving time of the cinema site. The latest information indicates that the average travel time to a cinema is 18 minutes\textsuperscript{17}. Therefore in Figure 6.1 we analyse the current cinema provision within South Gloucestershire using 18 minute drive-time isochrones from the three cinemas in the study catchment.

6.13 The screen density for cinema provision in the South West region is 5.5 screens per 100,000 population\textsuperscript{18}. The study area catchment area has a resident population in 2009 of 372,881. Applying this population to the average population density for cinema provision suggests a requirement for 21 screens. The GIS analysis reveals that the two Vue cinemas (offering 25 screens in total) have a screen density of 3.9 per 100,000 population. However in reality the density is much higher as most Bristol residents within the catchment of Cribbs Causeway and Longwell Green multiplexes will also use other cinemas in Bristol.

\textsuperscript{16} UK Film Council (2008) 2008 Statistical Yearbook
\textsuperscript{17} Source: Caviar
\textsuperscript{18} Source: The Cinema Advertising Association
6.15 There are areas within South Gloucestershire that fall outside the 18 minute drive-time isochrones. Roughly 26,000 people live more than 18 minutes from all three of the catchment’s cinemas. This indicates that they could support 1.4 screens, or for the 46,000 who are more than 18 minutes from the two Vue multiplexes, a further 2.5 screens could be supported. In summary, a number of points can be drawn:

- Residents in the western area of South Gloucestershire benefit from good cinema provision
- It is noted that both cinema complexes are out-of-town locations, with a distinct lack of town centre provision. Not all young people (the primary cinema user group\textsuperscript{19}) will have access to a car and that they may favour visiting the Bristol City Centre cinemas due to the more frequent bus services

\textsuperscript{19} Source: UK Film Council (2008) 2008 Statistical Yearbook
In the main, it is likely that the majority of South Gloucestershire residents use the two Vue cinemas within the authority, where access by car is good and parking free. The household survey revealed that residents in Zone 2 visit the village cinema at Wotton-under-Edge, although film choice and showing frequency are somewhat limited here, hence the catchment is very localised.

Cinema expenditure is projected to grow and despite more than adequate screen density, the expenditure could support a small-medium sized multiplex cinema or two independent cinemas

The proposals for a town centre cinema in Yate seem to fit well with this analysis. Residents beyond the 18 minute drive-time isochrones are located in the eastern part of the study catchment and would be likely to use a cinema facility in Yate rather than journey to Cribbs Causeway or Longwell Green

In our assessment, provision is good for the Bristol east fringe; the proposals for a medium sized multiplex at Yate would appear to be economically feasible. Further market testing would be required as cinema expenditure growth in the short-term (2009 to 2011) is only £150,000.

**Bingo**

Presently there are no bingo halls within the study area (i.e. zones 1-18), however there is a Gala Bingo on Fishponds Road just outside Zones 12 and 14, about 1.5km into the Bristol administrative area (as indicated in Figure 6.2). There are four more bingo halls in Bristol, all of which are multiples. None occupy a city centre spot.

Empirically it is felt that South Gloucestershire has capacity for a Gala-type or neighbourhood bingo club in a town centre location. In quantitative terms there is a projected £1.38m in increased expenditure for bingo halls to 2021, which could potentially support a new Gala or Mecca-type club (which generate average annual net stakes of around £1.47m per branch), although a smaller neighbourhood club is likely to be more feasible, for which annual net stakes average around £444,000 per branch.

More targeted market testing would be required to ascertain whether operators of neighbourhood bingo clubs would consider locating in the catchment area. However, Longwell Green, Cribbs Causeway and possibly Kingswood are likely to be suitable and attractive locations to bingo operators, where there is existing provision for cultural and leisure services.

**Casinos**

There are no casinos within the study area catchment, however there are four multiple casino operators in Bristol, all located within close proximity to the city centre, as shown in Figure 6.2.

There used to be a large Dave & Buster’s located at The Venue, Cribbs Causeway. This took the form of a UK operated American franchise which included a joint restaurant and entertainment concept with slot machines and arcade style computer games. Dave & Buster’s traded for around two years and despite apparent strong sales the business was not profitable - partly due to operating from such a large unit and restricting the target...
market by employing US rules for over-21 entry only. Enthusiasm for the store appeared to fade after the initial opening period, although from this example it is difficult to assess whether there could be support for a smaller scale casino or alternative games of chance outlet within the South Gloucestershire study area.

6.22 Given that a small-scale ‘traditional’ casino generates average annual turnovers of around £3.6m per casino\(^{20}\) there is likely to be limited scope for the provision of this type of facility in this area, particularly when the remaining claims on expenditure in this category are considered, for which the projected increase is £1.82m.

Food and Drink

6.23 Food and drink expenditure is generally fairly localised, however, the strong ‘evening economy’ offer in Bristol’s City Centre captures a significant share of the study areas expenditure. The survey of households reveals useful information regarding the market shares of expenditure on restaurants and cafes and also for pubs, bars and nightclubs. The following information can be observed:

- 24 per cent claimed not to spend money on restaurants and cafes and 45 per cent claimed not to spend money at pubs, bars and nightclubs
- 21 per cent of study residents who do spend money in restaurants and cafes do so in Bristol city centre, with 6 per cent at Cribbs Causeway
- Other recipients of restaurant and café spend are Bath City Centre (5 per cent), Yate (5 per cent), Thornbury (3 per cent) and Longwell Green (3 per cent)
- The greatest expenditure for pubs, bars and nightclubs is directed towards Bristol city centre (13 per cent), however no single location has a dominant share
- Kingswood, Yate, Thornbury and Bradley Stoke all receive around 3 per cent of the total study area spend on pubs, bars and nightclubs.

6.24 The survey results show that although Bristol attracts the highest share for food and drink expenditure, thereafter, the pattern of spending is fairly localised, where each zone has a relatively high retention rate.

6.25 Overall, the survey data indicates that 17 per cent of food and drink expenditure leaks to Bristol city centre. Therefore, of the projected growth in expenditure of £100m by 2021, £83m could be retained within the study area. However, not all of the growth in retained expenditure will be available for new restaurants/cafés, pubs/bars and take-away outlets. In the same way that an allowance is made in the retail sector for existing operators to improve their turnover efficiency, it is reasonable to assume that some of the growth in available food and drink expenditure will be absorbed by existing operators (to allow them to grow their business, re-fit their premises, and so on). Unlike in the retail sector, however, there is a dearth of published advice on what proportion of expenditure growth in the food and drink sector should be ring-fenced for existing operators. In the absence

\(^{20}\) Source - The Gambling Commission
of firm guidance, we have therefore allocated half of the growth in food and drink expenditure to existing restaurateurs and pub/bar operators (i.e. £41.5m).

6.26 The £41.5m ‘residual’ growth in food and drink expenditure up to 2021) would be sufficient to support a range of new, good-quality restaurants - which typically generate annual turnovers of around £850,000 to £1m, but with some high-profile restaurant operators taking in excess of £1m per annum - as well as several branded pubs/bars, which typically have annual turnovers of between £800,000 and £1.2m, and possibly some smaller casual dining pubs which generally turnover less than £500,000 a year. Thus, in broad terms there would be sufficient expenditure growth to support around 30 to 40 new food and drink operators in the period up to 2021.
Figure 6.2: Location of Cinemas, Bowling Centres, Bingo Clubs, Snooker and Pool Clubs and Casinos Within and Surrounding the South Gloucestershire Study Area

List of Leisure Facilities

Cinemas
1. Vue Cinema
2. Vue Cinema
3. Showcase Cinemas
4. Orpheus Cinema
5. Cinebar
6. Odeon Cinema
7. The Cube Cinema
8. Watershed
9. Cinema De Lux
10. Electric Picture House

Bingo Halls
11. Gala Bingo
12. Mecca
13. Gala Clubs
14. Riva Bingo Club
15. Gala Clubs

Bowling Centres
16. Bowlplex
17. Hollywood Bowl
18. Hollywood Bowl

Snooker and Pool Clubs
19. Keynsham Snooker Centre
20. Rileys Pool, Snooker & Poker Club
21. Snooker City
22. Rileys Pool, Snooker & Poker Club
23. Z Club
24. Pot Black Club

Casinos
25. Gala Casinos
26. Gala Casinos
27. Griffin Casinos
28. Grosvenor Casino
29. Mint Casino Bristol

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Cultural Facilities

6.27 Here the study looks into the benefits of cultural provision in general, followed by an assessment of current cultural facilities within South Gloucestershire. It also considers any potential or planned cultural projects which will be of benefit.

6.28 Cultural attractions, public realm enhancements and arts projects, are thought to have a number of social and economic virtues, not least:

- As place marketing icons
- Contributing to property led regeneration
- Developing experience economies - which bring tourism and discretionary spend e.g. Convent Garden
- Social inclusion and local employment - drawing on ‘natural skills’ and ‘learned skills’.

6.29 There are a number of economic impacts that can accrue through the development of cultural projects, these include: a consumption value received by users who spend money (such as the ticket price for museum entry, travel and other related expenditure) and for non-users an enhanced quality of life aspect. Additional jobs and income as a result of a new cultural facility and potential longer term catalytic effects associated with a rise in ‘the value of a place’ which can bring knock-on benefits of rising property prices and investment.

Alternative to the economic impacts, cultural facilities and assets uphold an important role for social and service provision and can enhance the value of town centre locations for residents and visitors alike.

Cultural Facilities in South Gloucestershire

6.30 Although cultural development includes a wider range of activities such as festivals, public realm, arts projects and community activities, the study concentrates on provision of facilities, which may complement or be located in and around the study town centres. Such facilities include museums, libraries, archives, community centres, theatres and music venues.

Museums

6.31 Museums are generally very well placed as both tourist attractions, which bring people and expenditure to a location and as community based centres for local history and conservation of culture. A recent study undertaken by RTP for MLA South East identified that larger museums are a valuable component to a destination’s overall visitor ‘offer’ of attractions and products. In some cases museums will help to contribute to the tourism offer in less well known/visited areas, thus helping to disperse tourism visits to areas that visitors may not otherwise visit.

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21 Roger Tym & Partners (2008) Assessment of the Contribution of Museums, Libraries and Archives to the Visitor Economy, for MLA South East
6.32 South Gloucestershire has a number of small museums which are likely to attract a small number of tourism day visits (around 40 per cent for example), but will predominantly service local visits. There are four museums in the study area, these include:

- Thornbury museum
- Yate Heritage Centre
- Kingswood Heritage Museum
- Concorde at Filton

6.33 The Concorde at Filton is currently a temporary arrangement which offers pre-booked tours Wednesdays to Sunday, with up to three guided tours per day. There is support for a permanent Aviation Heritage Centre, which would be the permanent home for the Concorde and Bristol Aero Collection, which is currently housed at Kemble Airfield near Cirencester. It is thought that there may be a suitable site for the Aviation Heritage Centre to the north of Filton Airfield which could link to The Mall (regional shopping centre). This opportunity could provide a significant tourist attraction for South Gloucestershire and depending upon location could tap into the through flow of retail shoppers visiting Cribbs Causeway and The Mall.

6.34 Bristol provides the lion’s share of the museum offer, with a number of larger facilities. The Bristol City Museum and Art Gallery is the largest of the Council run facilities, with the ability to host national touring collections. In addition, there is the British Empire and Commonwealth Museum at Temple Meads, which has 16 galleries and hosts special exhibitions. Located by the harbourside is At-Bristol, which includes the Explore Science Centre and a planetarium. At-Bristol received around 450,000 visitors per annum between 2003 and 2006 and is the largest visitor attraction in Bristol. Furthermore the popular visitor attraction the ss Great Britain is also located just outside Bristol City Centre and a new ‘Museum of Bristol’ is due to open in summer 2011.

6.35 In summary, the higher profile museum attractions/collections are in Bristol. As a large urban centre and visitor destination, Bristol can support a range of museums and attractions. There is opportunity for a medium-sized visitor attraction at Filton for the Concorde; however previous examples of this model where attractions are linked to shopping centres (which assume that there would be a high footfall of people wanting to visit the attraction) have not been particularly successful. In general visitors have tended to come specifically to shop or specifically to the attraction, but it has been hard to get people to do both. It is also likely to require capital grant funding and some kind of revenue commitment to keep the attraction running. The concept of an Aviation Centre is likely to establish specialist interest both regionally, nationally and internationally, which will provide economic benefits. However, the ability to attract and sustain high visitor numbers is likely to require regular changing and refreshing of the exhibits in order to encourage repeat visits.

22 Assumption based upon museum visitor profiles constructed in the above MLA study.
Libraries

6.36 Libraries, both public and commercial, are an important resource for local communities. They act as the holders, managers, and access points for knowledge, providing a safe and freely available facility for information, education, training, life-long-learning, and social inclusion. Through work undertaken by RTP into the libraries sector, we found that the role and impact of libraries is very much focused on the needs and requirements of local users and communities.

6.37 South Gloucestershire has 14 libraries, located at all of the main centres plus some smaller ones in the settlements of Winterbourne, Downend, Cadbury Heath, Severn Beach, Patchway, plus a mobile library, which takes in many of the smaller villages. RTP has previously researched a number of case studies where new library developments are widening their appeal and contributing towards regeneration of town centre locations and enhancement of the visitor economy.

6.38 Hampshire County Council has redeveloped two of their main libraries under a Discovery Centre brand, one in Gosport and one in Winchester. This concept not only revitalised the traditional library functions, but has also introduced exhibition/gallery space, cafes, and provides a venue for events and performance.

6.39 This mixed-use approach enhances the role for libraries as community facilities and appears to work well in town centres, where increased use of the library facility can lead to linked trips to the town centre. At present South Gloucestershire Council are undertaking a major extension and refurbishment to Yate town centre library. Funding of £1.5m has been provided by the Big Lottery fund and the plans include provision for a community learning facility, exhibitions and office space for use by various local groups. Further to this South Gloucestershire opened a new library facility in Staple Hill which has increased the amount of space and added additional computers and a community room for local groups. There are also plans for a modest refurbishment of Chipping Sodbury library, and extensions to the libraries at Hanham and Embers Green.

6.40 Clearly there has been a valuable set of investments into library facilities in South Gloucestershire. However, due to their local and community-based catchment, it is likely that a number of other centres could benefit from new modern facilities, especially where they can provide a variety of community services. Centres such as Thornbury and Kingswood are likely to support such improvements, however at present they have adequate provision and any new project is likely to be dependent upon private investment and public funding.

Archives

6.41 Archive facilities are thought to be valuable access points to cultural and historical information. Archives are an important resource for the community, where they can be used
as tools for building identity and cohesion and also as learning resources, where people actively gain knowledge through operating and using archives\textsuperscript{24}.

6.42 South Gloucestershire Council’s archive collection is held in partnership with Gloucestershire Archives in Gloucester. This is likely to be a practical arrangement, which also ensures appropriate care of their materials. In addition there is the Bristol Record Office, which also offers online access to some of its materials. The Bristol Aero Collection is a specific aviation archive relating to the engineering of the Bristol Aeroplane Company and its successors at Filton and Patchway. Presently the Bristol Aero Collection is housed at a hanger on Kemble Airfield near Cirencester, however it hopes to relocate alongside the Concorde at Filton Airfield, should plans for a purpose built heritage centre be realised. There is also a Rolls-Royce Heritage Trust collection based at the former engine test houses at Patchway.

6.43 South Gloucestershire holds valuable aviation collections which are likely to be of national and international importance and interest. However it is unlikely that there will be enough demand to warrant an additional facility, there is no special requirement for a town centre location.

*Theatres and Music Venues*

6.44 South Gloucestershire has no theatre provision at present; however there are nine theatres of various sizes all located in and around Bristol’s city centre, including the regionally significant Hippodrome and the Bristol Old Vic (as illustrated in Figure 6.3).

\textsuperscript{24} RTP (2008) Assessment of the Contribution of Museums, Libraries and Archives to the Visitor Economy, for MLA South East
Figure 6.3: Location of Theatres and Live Music Venues

Location of Theatres and Live Music Venues

List of Theatre & Music Facilities

Theatres
1. Bristol Hippodrome
2. The Bristol Old Vic
3. Wickham Theatre
4. Colston Hall
5. Victoria Rooms
6. St. George's Bristol
7. Redgrave Theatre
8. The Tobacco Factory
9. Alma Tavern & Theatre

Live Music Venues
10. Bristol Academy
11. Joe Public's
12. The Fleece
13. The Louisiana
14. Bristol Bierkeller
15. The Bristol Folk House
16. Tantric Jazz Cafe Bar
6.45 The lack of theatre presence within the study catchment means that there is no opportunity for theatre and concert expenditure to be circulated within the catchment. Expenditure on theatre admissions by residents of the study catchment is projected to rise by £2.9m by 2021 to a total of £36m. It is felt that the majority of this spend would be absorbed by the existing operators in Bristol and Bath.

6.46 There is local support for a new theatre/arts centre in Thornbury town centre. A not-for-profit organisation has established to develop the project, which would also serve to regenerate the town centre and bridge the arts facility vacuum between Bristol, Bath and Gloucester. It is thought that a small scale high quality and flexible venue for arts and performance is likely to be well supported locally, however it would ideally need a centre or edge-of-centre location and significant capital funding.

6.47 There is little in the way of live music venues in the study area. Bristol hosts a number of small and medium size venues, including the Carling Academy and Colston Hall and any new development of scale would be expected here rather than in the South Gloucestershire study area. Larger concerts have in the past been held on a temporary basis at Ashton Gate stadium, Queens Square and there is an annual festival at the Ashton Court Estate. It is unlikely that South Gloucestershire will support a dedicated music venue however a smaller scale mixed-use venue such as the proposed one for Thornbury is likely to be well received. There may also be scope for some kind of facility at Cribbs Causeway or within the UWE complex.

Leisure Opportunities

6.48 Integration of leisure service uses into town centres can enhance the role and appeal of existing settlements and help to support the vitality and viability of the settlement through longer dwell times and extended activity throughout the day. Therefore there is opportunity to be proactive in the town centres to encourage leisure service uses and adapt to new forms of leisure activity as and when they arise.

Office Requirements

Future Requirements

6.49 South Gloucestershire engaged consultants to produce an employment land study. The results of this should be used to guide policy for employment provision, including that of office space in South Gloucestershire. However, in lieu of this work we have used a recent study commissioned by the South West Regional Assembly to indicate a strategic level of office growth.

6.50 In 2008 the South West Regional Assembly commissioned a report “RSS Employment Land Provision: Spatial Implications” to provide strategic guidance on the spatial implications of employment land provision. The guidance is intended to help inform the development of Local Development Frameworks, expanding on the policies and targets in the emerging Regional Spatial Strategy. The report provides a breakdown on forecast employment floorspace 2006 - 2026 across the South West region.
6.51 For offices, the employment forecasts translated into floorspace demand show an increase of 2,180,300 sq m at the higher rate of growth. At 40 per cent plot ratios, this would result in a land requirement of 545 ha.

**Table 6.3 Office floorspace change 2006-26, South West**

<table>
<thead>
<tr>
<th>District</th>
<th>2.8% GVA</th>
<th>3.2% GVA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office</td>
<td>1,857,113</td>
<td>2,180,337</td>
</tr>
</tbody>
</table>

Source: Cambridge Econometrics, RTP

6.55 This figure is broken down by housing market area and local authority area. The West of England HMA has the largest office sector in the region and is dominated by Bristol City. Looking at floorspace change across the districts, Bristol, South Gloucestershire and BANES show the largest gains of 300,000 sq m, 250,000 sq m and 150,000 sq m equivalent to 76 ha, 64 ha and 37 ha respectively. All other districts show office floorspace gains of less than 110,000 sq m. This represents a significant increase in required office floorspace in South Gloucestershire.

**Table 6.4 Office Floor Space Change by District & HMA, 2006-26**

<table>
<thead>
<tr>
<th>District</th>
<th>2.8% GVA</th>
<th>3.2% GVA</th>
</tr>
</thead>
<tbody>
<tr>
<td>BANES</td>
<td>138,576</td>
<td>152,981</td>
</tr>
<tr>
<td>Bristol</td>
<td>273,633</td>
<td>304,858</td>
</tr>
<tr>
<td>North Somerset</td>
<td>74,164</td>
<td>83,000</td>
</tr>
<tr>
<td>South Gloucestershire</td>
<td>228,305</td>
<td>254,150</td>
</tr>
<tr>
<td>West Wiltshire</td>
<td>38,584</td>
<td>48,647</td>
</tr>
<tr>
<td>Mendip</td>
<td>40,607</td>
<td>46,782</td>
</tr>
<tr>
<td>West of England HMA</td>
<td>794,928</td>
<td>890,418</td>
</tr>
<tr>
<td>Cheltenham</td>
<td>21,974</td>
<td>23,719</td>
</tr>
<tr>
<td>Gloucester</td>
<td>27,528</td>
<td>35,212</td>
</tr>
<tr>
<td>Tewkesbury</td>
<td>27,803</td>
<td>31,427</td>
</tr>
<tr>
<td>Cotswoold</td>
<td>41,074</td>
<td>45,302</td>
</tr>
<tr>
<td>Forest of Dean</td>
<td>26,122</td>
<td>29,193</td>
</tr>
<tr>
<td>Stroud</td>
<td>16,309</td>
<td>20,867</td>
</tr>
<tr>
<td>Glouc &amp; Chelt HMA</td>
<td>160,811</td>
<td>185,720</td>
</tr>
<tr>
<td>Swindon</td>
<td>90,724</td>
<td>116,711</td>
</tr>
<tr>
<td>North Wiltshire</td>
<td>52,207</td>
<td>58,453</td>
</tr>
<tr>
<td>Kennet</td>
<td>26,209</td>
<td>23,716</td>
</tr>
<tr>
<td>Swindon HMA</td>
<td>169,140</td>
<td>204,880</td>
</tr>
<tr>
<td>Salisbury</td>
<td>45,971</td>
<td>54,639</td>
</tr>
</tbody>
</table>

6.56 However these growth rates may need to be tempered as a result of the recent economic downturn. It is difficult to anticipate with any certainty the impact of the downturn and its long term effect. Property agents Savills produce regular reports on development activity in the market. The last was published in October 2008. This included a note on the short term outlook which concluded that:

“business sentiment dropped to a new series record low in September, as developers anticipate that recent global financial market turmoil will further restrict credit availability and reduce tenant demand. Data indicated that firms were pessimistic about the prospects for office and retail and leisure development projects”
Therefore whilst these figures offer some guidance regarding the likely requirement for new office space in South Gloucestershire, in the short term they should be treated with caution.

**Office Market Overview of South Gloucestershire**

The office property market in South Gloucestershire has in recent years been concentrated in office parks, mainly located on the north Bristol fringe. These areas, up until recently continued to attract major investment in the development of new office space. For example developments such as “The Hub” in Aztec West, Lysander House at Cribbs Causeway and the Harlequin Office Park at Emersons Green are all being currently developed and are contributing around 17,000sqm of new office space. Knight Frank’s activity report for 2008 suggests that the north fringe is the prime area for office demand (outside of Bristol City Centre) and that there is currently little availability of quality office space in this area.

The town centres in South Gloucestershire are not traditionally a location for major office development. Where offices are located in the town centres they are typified by small units often above retail premises. The past level of interest in the office parks suggests that this is the type of office accommodation that is demanded by the market. Given this significant out of town development of office space in South Gloucestershire is unlikely that that there will be pressure for major office development within South Gloucestershire’s town centres.

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**Summary of Scope for Additional Commercial Leisure, Cultural and Office Requirements**

**Commercial Leisure**

- Expenditure on leisure services in the South Gloucestershire catchment area is projected to grow by £196.9m in the period up to 2021. How this growth might be expended locally depends very much on what opportunities the market supplies - thus, current spending patterns can only provide a guide to what might happen in the future.

- On the basis of current spending levels in the catchment area, just under 60 per cent of this spending growth (£100m) will go to eating and drinking establishments (restaurants, cafés, take-away outlets and pubs/bars). Capturing a sizeable proportion of this growth in expenditure through the provision of a better and more appealing choice of restaurants, cafés and pubs/bars will be vital to the future health of all of the town centres within the catchment area. Whilst Bristol attains the highest market share for food & drink, the survey revealed that expenditure is fairly localised and further appropriate facilities, including better quality establishments, should be welcomed.

- The remainder of the growth in expenditure on leisure services will go to a wide range of activities, with no single activity capturing any significant market share. The assessment of cinemas showed that provision is good, especially for those on the Bristol fringe or within easy access of The Venue at Cribbs Causeway. Growth in cinema expenditure should be able to support a small-medium sized cinema and proposals for such a facility in Yate would help to serve the needs of residents in this area of the District.

- There is potential growth in leisure expenditure to support a new bingo hall. At present there are no bingo operators within the catchment, although more targeted market testing would be required in order to gauge whether operators would be interested in the study.
area. The growth in expenditure suggests that there will be little scope for casino development.

**Cultural Facilities**

- The report considers cultural facilities which may complement or be located within and around the study town centres. Our assessment looks at museums, libraries, archives and theatres.
- Bristol is the key destination for museum visits; however there are plans for a Concorde museum at Filton, which could potentially link to The Mall/Cribbs Causeway. Although the concept of an ‘aviation centre’ is likely to establish specialist interest both regional, nationally and internationally, it will be difficult to encourage repeat visits and is likely to require capital and revenue funding.
- All of the study town centres and a number of smaller town and village locations have their own public libraries. Yate town centre library has undergone refurbishment and an improved library facility has recently opened in Staple Hill. The study draws attention to the significant contribution that new mixed-use libraries can have for communities and town centres, such as the Discovery Centre brand developed in Hampshire. Towns like Thornbury and Kingswood could benefit from this type of model but at present there are no plans for new facilities.
- Although South Gloucestershire holds archive records there is unlikely to be demand for new town centre facilities.
- There are no dedicated theatre and live music facilities in the study catchment at present. Most expenditure is directed to Bristol city centre. The plans for a arts, music and theatre facility in Thornbury is likely to enhance the vitality of the town centre, however funding and delivery of this project will be difficult.

**Office Requirements**

- The office property market has, in recent years, concentrated on office park developments located on the north Bristol fringe. On the whole, South Gloucestershire’s town centres are not a location for office development.
- The Council is currently awaiting an employment land study, which will guide policy for office space however recent work undertaken by the South West Regional Assembly indicates that the floorspace requirement for South Gloucestershire between 2006 and 2026 will be 228,000 sq m based upon the Regional Economic Strategy’s lower growth scenario of 2.8 per cent increase in GVA per annum. This is the second largest requirement of any authority in the South West after Bristol.
- The Council’s employment land study will guide policy for office space however growth in office space may need to be treated with caution in light of the current economic downturn. Developers are currently pessimistic about office, retail and leisure developments, for which there is likely to be reduced demand from tenants in the short term.
7 STRATEGY AND RECOMMENDATIONS

Introduction

7.1 In Section 2 of our report, we set out the requirements that PPS4 imposes on Regional Planning Bodies (RPBs) and Local Planning Authorities (LPAs) in preparing development plans. These include the need to:

- Set out a strategy for the management and growth of centres over the plan period
- Promote competitive town centre environments and provide consumer choice
- Identify a range of sites to accommodate identified need

7.2 Thus, in preparing their Development Plan Documents (DPDs) within the context set by the RSS, LPAs must:

- Select appropriate existing centres to accommodate growth, making the best use of existing land and buildings, but extending the centres where appropriate using tools such as Area Action Plans, CPOs and strategies to improve transport, land assembly, crime prevention and design;
- Manage the role of existing centres through the promotion of specialist activities, or specific types of uses; and
- Plan for new centres of an appropriate scale in areas of growth, or where there are deficiencies in the existing network

7.3 In Section 2, we refer to the test of soundness introduced by PPS12 in June 2008. This test requires the Council to demonstrate that its chosen strategy is the most appropriate, when considered against reasonable alternatives and, secondly, that the chosen strategy is effective and deliverable.

7.4 Thus, in assessing strategies for meeting retail and leisure needs, we have dismissed those which would clearly not accord with national and regional policy. Such inappropriate strategies include trying to meet most of the need in existing out-of-centre retail parks or recommending no action for town centres. In addition, we consider that all reasonable strategies should acknowledge our suggested revision of the hierarchy of centres and the availability of opportunity sites within or on the edge of smaller centres.

7.5 Our recommendations for the town centres set out retail and leisure floorspace requirements for South Gloucestershire. These are rounded to the nearest 100 sqm for ease of presentation. We also make recommendations as to how these requirements could be achieved. Due to our reservations as to the accuracy of forecasts post 2021, more weight should be given to the 2009-2021 requirements. The requirements to 2026 are less reliable and should be reviewed within five years of this study and with regular monitoring thereafter.

7.6 The recommendations below are intended to inform the Core Strategy and future development plan documents (DPDs) or any other local development documents (LDDs).
Recommendations for hierarchy of centres in South Gloucestershire

7.7 In Section 3 (and Appendix 1 and 2), there is an assessment of the vitality and viability of ten centres identified by South Gloucestershire. In addition, we have also considered the role of Cribbs Causeway and its relationship with the other town centres. The scope of our work set out by the Council did not include detailed assessments of the vitality and viability of the smaller localised centres, shopping parades, neighbourhood centres or small villages.

Planning Policy Guidance

7.8 The thrust of planning policy set out in PPS4, the South Gloucestershire Local Plan and the emerging RSS is that new retail development should be located within town centres, or failing that, on the edge of established town centres. Out-of-centre development is the least preferred option. The adopted South Gloucestershire Local Plan sets out the district’s retail hierarchy as comprising Major and Minor town centres and local centres as shown in the Table 7.1. The minor town centre is the equivalent to the PPS4 defined district centre.

Table 7.1 South Gloucestershire Local Plan retail hierarchy

<table>
<thead>
<tr>
<th>South Gloucestershire retail hierarchy</th>
<th>Centres</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major Town Centre</td>
<td>Emersons Green, Kingswood, Staple Hill, Thornbury, Yate, Bradley Stoke</td>
</tr>
<tr>
<td>Minor Town Centre</td>
<td>Chipping Sodbury, Downend, Hanham, Filton</td>
</tr>
<tr>
<td>Local Centre</td>
<td>50 centres identified across authority area</td>
</tr>
</tbody>
</table>

7.9 There is also a large quantity of out of town retail floorspace located at Cribbs Causeway/Mall and in retail parks at Abbeywood/Filton and Longwell Green.

7.10 There is a planning policy dilemma related to the future role of retailing at Cribbs Causeway and the Mall and to a lesser extent at Longwell Green and Abbeywood/Filton. This is because these out of centre facilities account for a high proportion of comparison goods expenditure. However, the policy presumption is that retail development should be located in town centres where existing market shares would not justify the scale of development suggested. Furthermore, there may be neither physical nor market capacity to enable a high level of town centre development. Thus the issue raised is whether we seek to allow existing market trends to continue to dictate the location of retail floorspace and therefore what measures need to be in place to create the right conditions for change.

7.11 We deal subsequently with the potential for change in the main town and local centres. At this point we review the policy options for change at Cribbs Causeway and the Mall.

Cribbs Causeway/the Mall

7.12 Cribbs Causeway and the Mall (Cribbs) is an important shopping destination which may have the potential to meet local needs in South Gloucestershire and assist delivery of a sustainable pattern of development. Cribbs is not a town centre. It is a ‘regional shopping centre’ as defined in Annex B of PPS4. Paragraph 3.1 of PPS4 states that the expansion of
such a centre must be addressed through the RSS and not through individual applications or local development documents (LDD). It is plain therefore that any expansion to Cribbs must be triggered by the South West RSS.

7.13 The Proposed Changes RSS, whilst recognising the importance of Cribbs Causeway, provide clear policy advice that “the strategic extension of the existing major shopping centres of Cribbs Causeway and Clarks Village will not be supported” (TC2). Policy HMA1 provides for “an increase in local services at Cribbs Causeway retail centre to serve local communities but not to the scale of a formal town centre”

7.14 However, it is questionable how such a firm policy recommendation has come about given that GOSW, the Panel Report and the Proposed Changes have been critical about the approach to town centre and retail policy within the RSS. The Panel Report states that “the absence of a hierarchy-based distribution of demand is a serious deficiency, but we do not consider that we have the evidence to carry out a distribution of the future demand at this point in time”. This statement is endorsed in the Proposed Changes with recommendation 8.2.4 which advises that “further work should be undertaken prior to the next review of the RSS to provide the following: a more disaggregated estimate of future demand; a hierarchy-based distribution; an assessment of the capacity of centres; and the identification of where growth should be encouraged including new centres in areas of planned growth.”

7.15 In considering whether Cribbs Causeway does have a role within the hierarchy of centres, we need to consider whether alternative centres within South Gloucestershire can provide the necessary environment and market to meet the needs of South Gloucestershire and whether Cribbs Causeway is suitable and capable for an enhanced role within the retail hierarchy.

Alternatives

7.16 The existing centres with the exception of Emerson Green and Yate all have less than a 2 per cent market share of comparison goods expenditure from within the study catchment area. This limited share is a reflection of the polarisation trend whereby out of town shopping areas such as Longwell Green and Cribbs Causeway and a strong city centre in Bristol are increasingly dominant in attracting retail and other town centre uses floorspace.

7.17 It is considered that the existing smaller centres, with the exception of Emersons Green and Yate, are no longer capable - physically, commercially or environmentally of serving a strategic function for retail, leisure and office uses. Whilst some of the centres such as Kingswood may be able to accommodate a limited increase in retail provision through redevelopment, it will not be sufficient to meet all the anticipated comparison retail floorspace. Therefore a deficiency in floorspace across the network will still exist.

Can Cribbs Causeway fulfil a deficiency in the network?

7.18 It is considered that Cribbs Causeway could perform the role of meeting the deficiency in the network, having regard to the objectives in PPS4. This is for several reasons:
- Cribbs Causeway exists and performs a strategic function and is not going to go away
- It has become South Gloucestershire’s principal strategic centre for retail, commercial and leisure
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- Together with the strategic office location at Aztec West and proposed residential development at Charlton Hayes there is potential to:
  - integrate Cribbs Causeway with existing and new areas through the bus rapid transit scheme and other transport improvements
  - widen the range of land uses to include more housing and mixed use developments to provide a better focal point for communities in this part of the North Fringe.
- Cribbs Causeway has the physical and market potential to meet the needs which have been identified in the needs assessment

**Policy options for Cribbs Causeway**

7.19 The uncertainty regarding the adoption of the RSS, the recommendation for partial review and the impending Regional Strategy means that the role of Cribbs Causeway should be considered as part of this study to provide guidance for future policy discussions. The policy options as to the treatment of Cribbs, either through early review of Policy TC2 or through the new Regional Strategy, can be summarised in the following bullet points:

- **Option 1**: No change to Policy TC2, so that there is no net gain in retail floorspace at Cribbs and no change to its status as an ‘out-of-centre’ retail location for PPS4 purposes. This option would not allow for any restructuring of Cribbs in policy terms during the Plan period.

- **Option 2**: No change to Policy TC2, but identify, now, the conditions that will need to be met for a change of status for Cribbs to be achieved, as part of an early review of this aspect of the RSS. For example, Cribbs could become a ‘town centre’ in the next review of the RSS if car parking charges are introduced, improvements to public transport and highways infrastructure are secured and there is a commitment to adopt a framework for mixed-use development. No net gain in retail floorspace will be permitted until ‘town centre’ status has been achieved. This option has commercial drawbacks since it would require significant investment in infrastructure even before ‘town centre’ status has been achieved, let alone new retail floorspace becoming operational.

- **Option 3**: Change or abandonment of policy TC2 so as to allow some net gain in retail floorspace in the lifetime of the Plan, with no change to Cribbs’ status in PPS4 terms, but with guidance from the RPB/Secretary of State, now, on broad quantum of development (based on the evidence within this study), timing of operation of new floorspace and conditions precedent before new floorspace is opened to the public. This option relies on robust evidence being provided to the RPB/Secretary of State to provide guidance on the quantum of development.

- **Option 4**: Change or abandonment of policy TC2 so as to allow some gain in retail floorspace in the lifetime of the Plan, including a change of status now and with guidance from the RPB/Secretary of State, now, on the broad quantum of development, timing of operation of new floorspace and conditions precedent before new floorspace is open to the public. Our view is that this option is unrealistic in that Cribbs clearly does not have the characteristics of a town centre and has not made sufficient progress in diversifying land uses within a coherent framework to justify ‘town centre’ status.

7.20 A similar situation has previously arisen with the regeneration of Brierley Hill/Merry Hill in the West Midlands. In that case the consensus reached both by the four Black Country Boroughs...
and the West Midlands RPB after two separate studies had been completed was that it was appropriate to plan for an additional specified (and capped) quantity or retail floorspace in Brierley Hill/Merry Hill but that this space could only be constructed and operated once three town centre characteristics have been satisfied.

7.21 Our recommendation is for the Council to adopt a similar approach in how they treat Cribbs, which is effectively Option 3 above. In the South Gloucestershire context we consider that there would be merit in adopting an approach as follows:

- This study would inform both the emerging South Gloucestershire LDF and RPB (South West Councils) as to an appropriate quantity of floorspace to aim for at Cribbs.
- RPB would then agree or vary the floorspace target for Cribbs either in a single issue early review of RSS or as part of the new Regional Plan.
- South Gloucestershire and the RPB would then work together to agree the criteria which would trigger the completion of development.

7.22 In essence the concept of what might be achieved is a strategy to convert Cribbs into a fully functioning town centre which is well integrated into the local community and is accessed in a sustainable manner with improved public transport. At Brierely Hill/Merry Hill the three criteria are that no additional retail floorspace can become operational until:

- The Area Action Plan is in place, with a clear framework for mixed-use development including further residential and employment uses.
- Implementation of improved public transport services has been achieved.
- A car parking charge regime has been introduced.

7.23 On this basis, assuming the policy criteria are met, it would be possible to achieve a regeneration strategy for the wider Cribbs Causeway area which allowed Cribbs an appropriate share of projected consumer expenditure growth and enabled it to become a town centre.

7.24 If Policy TC2 is not changed then the scope for additional retail floorspace at Cribbs is significantly reduced. The reason for this is due to the clear message in PPS4 that the expansion of a centre such as Cribbs needs to be addressed through the RSS.

7.25 We have not formally defined a potential Cribbs ‘town centre’ in geographic terms, thus we recommend that a separate study is commissioned to examine this point. This could form part of the evidence base behind an Area Action Plan for Cribbs, which examines the land uses within the Cribbs Causeway area against the PPS4 definition of a ‘town centre’.

7.26 At one extreme there is an option to consider the Mall (excluding the surrounding area) a ‘town centre’. However, this reduces the potential to establish a mix of uses and could frustrate any desire to regenerate the wider area. At the other extreme an option would be to treat the wider Cribbs Causeway area as a town centre, but this presents the difficulty of whether the retail parks should be afforded town centre status and thus be subject to expansion. Our recommendation is that a separate study on the potential extent of a town centre in the Cribbs Causeway area should define an area where a mix of uses can be established, whilst designating a PPS4 defined ‘Primary Shopping Area’ in which retail development is concentrated.
Town centres

7.27 Our analysis of the centres in South Gloucestershire highlights their differing roles and current performance. In terms of town centres Yate, Thornbury and Kingswood are all considered to perform that role with a wide range of retail, service sector and public facilities. These roles should continue in order to maintain the hierarchy. Emursors Green, although not a ‘traditional’ town centre does attract a higher spend than most of the centres, has potential to expand and is adjacent to one of the larger South Gloucestershire Local Plan mixed use allocations. Therefore its classification as a town centre is considered to be appropriate. Bradley Stoke centre has recently been developed and whilst dominated by a large Tesco store does offer other services and facilities consistent with a town centre designation.

7.28 In addition to the possible new town centre role for Cribbs, there is also potential for a new town centre in the M32/Filton corridor. Although there is retailing within this area, it is not within a town centre environment and lacks the diversity of other complementary town centre uses, such as services and leisure opportunities. There are plans for further housing growth in this area as well as redevelopment and expansion of the university and other employment uses. Therefore the need to provide local provision for the new development and lack of a current focus indicates a deficiency in the network which could be rectified through the identification of a new centre. Whilst this study does not seek to identify a specific site for a new centre it does consider that the Council should seek to identify a suitable area for a town centre through its plan making.

District centres

7.29 There are variations between the district centres in terms of their scale, retail offer and overall role in South Gloucestershire. Of the district centres Staple Hill currently offers the most in terms of retail floorspace and service provision, but it has declined in recent years. It is recommended that Staple Hill be reclassified as a ‘District’ rather than ‘Town Centre’ to better meet its current and future role. We consider that Hanham, Downend and Filton should continue as ‘District Centres’ meeting the local needs of their communities. Chipping Sodbury’s proximity and complementary role with Yate means that it is unlikely to fulfil a ‘Town Centre’ role and is most appropriately considered as a ‘District Centre’.

Hierarchy

7.30 The assessments in Section 3 and other work undertaken regarding expenditure patterns and location of future growth culminate in a suggested revision to the hierarchy set out in Figure 9.1 of the South Gloucestershire Local Plan.

7.31 The identified town centres not only provide a wide range of retail floorspace for both comparison and convenience but also offer other services and facilities including local public sector service provision. The district centres whilst not offering such a range of retail provision or other services do perform an important local provision role.
Table 7.2 Suggested Revision to South Gloucestershire hierarchy of centres

<table>
<thead>
<tr>
<th>Position in Hierarchy</th>
<th>Centres</th>
</tr>
</thead>
<tbody>
<tr>
<td>Town Centre</td>
<td>Thornbury, Yate, Kingswood, Emersons Green, Bradley Stoke</td>
</tr>
<tr>
<td>District Centre</td>
<td>Staple Hill, Chipping Sodbury, Hanham, Downend, Filton</td>
</tr>
<tr>
<td>Local Centre</td>
<td>Smaller centres have not been defined as part of this strategic study</td>
</tr>
<tr>
<td>Potential centre</td>
<td>Cribbs Causeway, M32/Filton corridor</td>
</tr>
</tbody>
</table>

Note: Hierarchy is based on descriptions in Table 1, Annex B of PPS4.

South Gloucestershire floorspace recommendations

Comparison goods retailing

7.32 The comparison capacity assessment indicates that there is only a quantitative need for new comparison floorspace in the study area after 2016. This need increases year on year and arises as a result of increases in population and consumer expenditure per capita.

7.33 The current retention rate of the Study Area is 59 per cent for comparison goods expenditure, with 41 per cent leakage to shopping destinations outside. The Study Area covers the district and two small areas outside - part of Bristol City and BANES. However, none of these areas attract any significant expenditure from within South Gloucestershire.

7.34 If the retention rate is kept at 59 per cent in future years, the Study analysis suggests that the future comparison goods floorspace requirement will range from 65,500 to 77,000 sqm net for the period 2009-26, depending on the level of population growth in South Gloucestershire.

7.35 RSS Proposed Changes include provision for substantial growth around the periphery of the eastern and northern fringes of Bristol, and around Yate/Chipping Sodbury. This could support opportunities and provide justification for planning interventions for enhancing the comparison goods retail offer in quantitative and qualitative terms at these locations.

7.36 The overall amount of floorspace growth is largely dependent on the decisions regarding planned housing growth. Therefore a range is provided to enable flexibility for South Gloucestershire in development of their policies.

Table 7.3 Comparison floorspace requirements (sq.m. net) with static retention rate

<table>
<thead>
<tr>
<th>Population Scenario</th>
<th>2009-16</th>
<th>2016-21</th>
<th>2021-26</th>
<th>Total 2009-2026</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scenario 1 (low)</td>
<td>0</td>
<td>31,300</td>
<td>34,100</td>
<td>65,500</td>
</tr>
<tr>
<td>Scenario 2 (high)</td>
<td>0</td>
<td>36,500</td>
<td>40,400</td>
<td>76,900</td>
</tr>
</tbody>
</table>

7.37 These requirements take account of committed floorspace (i.e. unimplemented planning permissions and allocations). There is around 18,000 sq m net committed comparison floorspace. The expenditure growth rates are derived from industry leading forecasts provided by MapInfo/Oxford Economics and Experian.
In the table below RTP provide a suggested breakdown by settlement of the comparison floorspace requirements, under Population Scenario 1 and based on our suggested hierarchy and areas of growth.

**Table 7.4 Comparison floorspace breakdown 2009 to 2026**

<table>
<thead>
<tr>
<th>%</th>
<th>Floorspace requirement (sq m net)</th>
<th>Scenario 1 with static retention</th>
<th>Scenario 2 with static retention</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Town centres</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yate</td>
<td>10</td>
<td>6,550</td>
<td>7,700</td>
</tr>
<tr>
<td>Kingswood</td>
<td>10</td>
<td>6,550</td>
<td>7,700</td>
</tr>
<tr>
<td>Emerson Green</td>
<td>10</td>
<td>6,550</td>
<td>7,700</td>
</tr>
<tr>
<td>Other town centres</td>
<td>10</td>
<td>6,550</td>
<td>7,700</td>
</tr>
<tr>
<td><strong>District centres</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All</td>
<td>20</td>
<td>13,100</td>
<td>15,400</td>
</tr>
<tr>
<td><strong>New centres</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cribbs Causeway</td>
<td>30</td>
<td>19,650</td>
<td>23,000</td>
</tr>
<tr>
<td>M32/Filton</td>
<td>10</td>
<td>6,550</td>
<td>7,700</td>
</tr>
</tbody>
</table>

Our view is that the majority of the requirement should go to areas and centres with the most potential for growth and development. The above table shows a breakdown where 30 per cent of the floorspace requirement is provided at Cribbs, 40 per cent in the town centres, 20 per cent in the District centres and the remaining 10 per cent at a location to be determined through the plan process but within the M32-Filton corridor as either a new or redeveloped retail and town centre area.

It is important to note that there is no justification for a net gain in comparison retail floorspace until after 2016, when existing commitments have been built out and when much of the new housing growth will have started to be brought forward. However, this would not affect proposals coming forward to improve existing retail stock that is outdated and needs to be redeveloped as long as there is no net gain.

The Council will need to decide whether it will be possible to deliver the necessary regeneration, public realm improvements, enhanced tenant mix and new retail scheme developments to enable the delivery of floorspace. New sites would need to be provided, with large modern units to attract multiple retailers, particularly higher end clothing shops which the healthcheck has found are poorly represented in some areas.

**Large Format Stores**

Research by RTP has shown that in most areas retail warehouses (defined by their format rather than what is sold there) account for around 15 per cent of total comparison expenditure. The 15 per cent allowance has been developed by RTP from an analysis of retail warehouse provision in various parts of the UK. For individual catchment areas we have estimated the turnover of all retail warehouses serving the area and have expressed this as a percentage of expenditure on all comparison goods by residents of the catchment.
area. The results have been consistently close to 15 per cent. The Council may wish to adopt this as guide - i.e. to allow for 15 per cent of the future floorspace requirement to be developed as retail warehouses. However, it is important to note that retail warehouse applications should be subjected to the sequential approach.

**Independent and Local Shops**

7.43 Independent and local shops are an important part of the District’s offer and are key attractors to the centres. The Council could consider requiring applicants for large retail schemes to include some small units, at lower rents, to be occupied by independent retailers.

**Convenience goods retailing**

7.44 The requirement for new convenience goods floorspace in the short to medium term (up to 2021) is negative. The table below shows that there is little quantitative generic need for new convenience floorspace even in the long term, despite the anticipated increase in new homes planned through the RSS. This is due to the projected slow growth of convenience goods spend and an allowance for the existing foodstores to improve their efficiency over time. However, there are some localised deficiencies which result in localised quantitative need.

7.45 In addition, the recent Tesco permission at Yate and an extension to Sainsbury’s at Stoke Gifford are included as commitments which would ‘soak up’ need in the short to medium term. Also, if stores close and are redeveloped or reoccupied for non food retail their floorspace should be re-provided.

**Table 7.5 Convenience floorspace requirements (sq. m. net)**

<table>
<thead>
<tr>
<th></th>
<th>2009-16</th>
<th>2016-21</th>
<th>2021-26</th>
<th>Change 09-26</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pop Scenario 1 (low: Draft RSS)</td>
<td>0</td>
<td>0</td>
<td>184</td>
<td>184</td>
</tr>
<tr>
<td>Pop Scenario 2 (high: RSS Prop Changes)</td>
<td>0</td>
<td>0</td>
<td>3,753</td>
<td>3,753</td>
</tr>
</tbody>
</table>

7.46 Several stores across the study area are over and undertrading. There is a lack of clear Government guidance as whether or not under/overtrading constitutes a quantitative lack/additional need and whether or not to take under/overtrading into account is a policy decision for the Council. However, unless there are very large differences from national average sales densities, statements about “over-trading” or “under-trading” are contentious, for the following reasons.

- The benchmark sales densities produced by Verdict and Mintel combine convenience and comparison sales. Attempts have been made to separate the two but these attempts are not convincing.
- It is also necessary to separate out the convenience floorspace of individual stores but such data is not readily available.
- The benchmarks also exclude VAT, whereas survey-based estimates for individual stores will include VAT. It is not easy to estimate the average VAT content of convenience sales.

7.47 Apart from these difficulties in assembling comparable data, information from several leading operators shows that there is considerable variation around their company averages for convenience sales densities. It is not unusual for individual stores to trade at 20 per cent to
30 per cent above or below the company average, and some stores trade at 100 per cent or more above. This can happen because of factors like efficient management or attractive store design and not just lack of competition. Therefore we do not think that either under or overtrading in South Gloucestershire should be taken into account for the purposes of this study.

7.48 There is qualitative and localised quantitative need for new floorspace in Chipping Sodbury and Hanham, both of which experience significant leakage to the superstores at Yate and Longwell Green respectively. There is currently operator interest to develop new supermarket provision in both these locations. Both proposals could be considered as edge of centre if appropriate links are made with their town centres. In our opinion an appropriately scaled development would have minimal negative impact on the town centres and would help to improve localised retention rates, reduce the need to travel and improve local availability and choice.

7.49 It is also worth noting that applicants proposing new retail floorspace (either convenience or comparison) at in-centre sites are not required to demonstrate that there is a need for the development. Therefore, there is scope to provide floorspace above the requirements as long as this is in-centre. In addition, there may be scope to provide floorspace above the requirements where a qualitative need can be shown; particularly if there will be regeneration benefits.

7.50 Applicants for new convenience floorspace should be required to adopt the sequential approach towards site location, with town centre sites being the most preferable, followed by edge-of-centre sites and then out of centre. Any new provision should be of a scale appropriate to the size and function of the centre.

7.51 We recommend that any new planning permission for a new foodstore or extension should be subject to a condition restricting the amount of floorspace that can be dedicated to the sale of comparison goods where it is located in an out of town location, to protect the vitality and viability of existing comparison retailers and encourage linked trips.

7.52 However, smaller scale developments in district or local centres should generally be permitted, as should small stores to support new housing developments. Annex B of PPS4 provides guidance regarding the type and size of stores which are appropriate within these areas.

**Leisure and culture**

7.53 There will be just over £196.9m available to support new leisure facilities within the study area between 2009 and 2021. However a significant amount of this increase in expenditure will be directed to restaurants, cafes and bars. If South Gloucestershire retains its current market share of expenditure on “restaurants, cafes and bars”, and allowing for existing operators to improve their trading efficiency, we allocate £100m of the growth to support new restaurants, cafes and bars. Capturing a sizeable proportion of this growth in expenditure through the provision of a better and more appealing choice of restaurants, cafés and pubs/bars will be vital to the future health of all of the town centres within the catchment area. Whilst Bristol attains the highest market share for food & drink, the survey revealed that such
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expenditure is fairly localised and further appropriate facilities, including better quality establishments, should be welcomed.

7.54 The remainder of the growth in expenditure on leisure services will go to a wide range of activities, with no single activity capturing any significant market share. The assessment of cinemas showed that provision is good, especially for those on the Bristol fringe or within easy access of The Venue at Cribbs Causeway. Growth in cinema expenditure should be able to support a small-medium sized cinema and proposals for such a facility in Yate would serve the east of the catchment effectively.

7.55 There is potential growth in leisure expenditure to support a new bingo hall. At present there are no bingo operators within the catchment, although more targeted market testing would be required in order to gauge whether operators would be interested in the study area. The growth in expenditure suggests that there will be little scope for casino development. There may also be scope to provide new facilities such as a bowling alley but it is considered that these should be market rather than plan led, given issues regarding commercial viability.

7.56 Bristol is the key destination for museum visits; however there are plans for a Concorde museum at Filton, which could potentially link to The Mall/Cribbs Causeway. Although the concept of an ‘aviation centre’ is likely to establish specialist interest both regional, nationally and internationally, it will be difficult to encourage repeat visits and is likely to require capital and revenue funding.

7.57 All of the study town centres and a number of smaller town and village locations have their own public libraries. Yate town centre library has undergone refurbishment and an improved library facility has recently opened in Staple Hill. The study draws attention to the significant contribution that new mixed-use libraries can have for communities and town centres, such as the Discovery Centre brand developed in Hampshire. Towns like Thornbury and Kingswood could benefit from this type of model but at present there are no plans for new facilities. Although South Gloucestershire holds archive records there is unlikely to be demand for new town centre facilities.

7.58 There are no dedicated theatre and live music facilities in the study catchment at present. Most expenditure is directed to Bristol city centre. The plans for arts, music and theatre facility in Thornbury is likely to enhance the vitality of the town centre, however funding and delivery of this project will be difficult.

7.59 Where proposals do come forward it is recommended that cultural facilities such as museums, libraries, archives and theatres are located within and around the study town centres wherever practical to complement other town centre uses and provide diversity and vitality.

Office Requirements

7.60 The market for major office developments is Stoke Gifford, Aztec West and Almondsbury Business Park within the Bristol North Fringe. There are also some significant office uses in the East Fringe at Emersons Green and many smaller scale offices in and around most of the town centres.
Future policy for office development will be informed National Policy (PPS4) and by the Council’s Employment Land Study and work undertaken by the South West Regional Assembly. Strategically the aim is to locate office development within city and town centres. However operator preferences and existing planning permissions mean that this is not easily achieved. The key studies indicate a continuing demand for office floorspace in the North Fringe and anecdotal evidence from officers confirms continuing demand despite the current recession.

The town centres have to date generally not proved attractive to major office investors or occupiers and where there is interest it generally has to compete for sites with retail and residential development. Nevertheless the Council is keen to promote more mixed use development and sustainable town centres and therefore strategies for individual town centres should address the scope for additional office floorspace. This may also help to relieve the pressure for office development to be concentrated in the North Fringe.

General town centre and retailing recommendations

In formulating our strategies, we have taken into account the availability of sites, the accessibility and function of the centres, their existing market share and the position of the centres in our recommended town centre hierarchy. As explained earlier, we have considered reasonable alternatives strategies in accordance with PPS12, before suggesting potential long term outcomes for centres in South Gloucestershire.

Strategy for North East area

Context and reasonable options for Yate, Chipping Sodbury and Thornbury

The towns of Yate, Chipping Sodbury and Thornbury are the three main centres in the rural area of South Gloucestershire, stretching from the River Severn in the west round to the M4 to the south east.

Yate is the largest town in this area and it dominates shopping patterns. Although the town centre does not currently attract the high end retail sector, it is a successful centre. Despite competition from the larger neighbouring centre at Cribbs Causeway/the Mall, it has enjoyed a fairly steady retail ranking between 2000 and 2008.

Yate is dominated by low value comparison retailing operated by multiples, but is complemented by nearby Chipping Sodbury which is a historic centre which tends to serve the market through smaller outlets run by local independents. Local residents are likely to use both centres to serve their shopping needs and in combination the two centres offer a good mix which could be further expanded.

Yate has a low vacancy rate and retail yields indicate investor confidence and profitable trading conditions for the town centre. Retail rents in the prime spots are thought to be high and compare favourably with other towns such as Chippenham and Weston-super-Mare. Part of the reason for Yate’s successful position as a high ranking district centre is thought to be due to its very defined catchment, which isn’t affected by Bristol so much as other centres like Thornbury, which are a 15-20 minute drive from The Mall at Cribbs Causeway. Furthermore, there is a prosperous catchment living in rural areas outside the town for which
Yate is the nearest shopping centre. Despite its apparent strong retail performance, Yate has potential for growth and redevelopment for two key reasons.

7.68 Firstly, the Proposed Changes to the RSS recognise that Yate is part of the Bristol SSCT, with opportunities to strengthen its role and better serve its own population and that in surrounding areas and thus identifies an urban extension for 3,000 dwellings. Work undertaken by South Gloucestershire Council shows that the population in the Yate and Chipping Sodbury area would increase by over 5,000 between 2009 and 2026.

7.69 Secondly, there is potential competition from other town centres and in particular Cribbs Causeway, Bradley Stoke and Emersons Green, which over time has the potential to erode the market share of Yate town centre. Therefore Yate needs to maintain and improve its offer to effectively compete.

7.70 Table 7.4 allows for between 6,550 sqm and 7,700sqm net of additional comparison floorspace over the plan period to be provided at Yate to meet the needs of the growing population, taking into account already permitted floorspace. This floorspace growth should allow it to effectively compete with nearby centre, enabling it to maintain its overall market share.

7.71 Chipping Sodbury’s main role is to provide services and top up shopping for local residents and more specialist independent stores to the wider community and rural catchment area. Research from the household survey illustrates that the town centre trading is a little below par, with local residents spending roughly equal amounts on retail goods in Yate as they do in Chipping Sodbury, with a greater level of leakage to Cribbs Causeway.

7.72 Chipping Sodbury’s proximity to Yate means that it will feel similar effects of growth as described for Yate. However, whilst provision of greater comparison floorspace and larger units might well attract more multiples’ interest it might also threaten the essence of the town centre, which is typified by small independent shops offering something different. In terms of overall strategy for comparison floorspace it may be preferable for the town to expand with its current specialist role and look to perform as a complement, rather than try to compete directly with nearby Yate. In terms of convenience floorspace a localised need has been identified, therefore provision should be made for further convenience floorspace in Chipping Sodbury. It is recommended that a new convenience store in Chipping Sodbury should positively contribute to the complementary role with Yate but be of sufficient size to meet the identified localised need. In terms of the impact on the existing centre and in maintaining a complementary role with Yate, a supermarket size development of up to 2,500 sqm net (as defined in PPS4), mainly selling food would be appropriate.

7.73 Thornbury retains a relatively vibrant and well supported town centre although at present there is a high vacancy rate at 40 per cent above the national average. This is affecting the proportional share of other uses within the town centre especially comparison shopping which is 20 per cent below the UK average in terms of units. In particular the town is under represented by clothing retailers which can be the key drivers of footfall in a centre.

7.74 Correspondingly the centre is more highly represented with services uses, especially banks and financial services, building societies and estate agents. This is common in many small towns and market towns, which will always struggle to compete with the comparison offer of
the larger towns, cities and retail parks. Such centres are increasingly becoming more service orientated which although a changing role does provides them with an attraction and use which is not always found in the main comparison shopping centres.

7.75 Thornbury is not identified as an area for major growth in the RSS. However there will be some housing growth and there is potential for expenditure growth associated with construction workers associated with the decommissioning and possible new construction of a nuclear power station at Oldbury. In order to support the town’s role as a service centre and provide an increased expenditure it would be advantageous to allow additional growth in the town, especially in the leisure and cultural sector. This would need to be coupled with further investment in the town centre to encourage improvement in the existing offer and environment and encourage diversification and complementary town centre uses to Cribbs Causeway.

**Spatial proposals for Yate, Chipping Sodbury and Thornbury**

7.76 In Yate to some extent redevelopment is already happening with the permitted expansion of the Tesco store and associated remodelling of the east of the town centre. The expanded Tesco store and associated extension to East Walk will deliver a mass of extra shopping space to the town centre. Convenience floorspace in the town centre is going to double and comparison floorspace provided by the Tesco store and East Walk units will increase the sales area by 80 per cent.

7.77 Other work such as the recently completed medical centre are improving other areas of the centre, however to continue this process the Council will need to decide about an appropriate strategy for the currently peripheral areas of the town centre. This could involve the moving of bulky goods provision to elsewhere in the town and the release of land for town centre uses.

7.78 In Chipping Sodbury there is limited opportunity for any major expansion of the shopping area. The only identified potential is the area of land to the north of the town centre which is currently occupied by open land and the main car park. Any development in this area would require new linkages through to Broad Street/High Street to ensure development was not isolated from the town centre. If there is further demand for smaller units then potential may exist behind some of the current shopping units for courtyard style redevelopment. Provision of a convenience supermarket in this location is likely to enhance trading in the town due to increased potential for linked local shopping trips.

7.79 Opportunity for expansion of Thornbury town centre is limited. The concentration should be on improving the existing offer, whilst maintaining the thriving independent retailer sector.

7.80 In summary, there is a shared ambition at regional and local level to continue to improve the retail and leisure offer in Yate town centre, whilst ensuring its complementary role with Chipping Sodbury. Thornbury needs to find a complementary offer to Cribbs Causeway, whilst maintaining its role to provide for local needs and services.
Strategy for North Fringe

Context and reasonable options for Cribbs Causeway, Bradley Stoke, Filton and M32/Filton corridor

7.81 The north fringe of Bristol is identified for major growth in the RSS. The population in this area could increase by around 20,000 over the plan period. The area is dominated by Cribbs Causeway and the Mall; however there are also town centres at Bradley Stoke and Filton, potential for an expanded centre at Patchway and a retail park at Abbeywood and further retail provision at Stoke Gifford.

7.82 Bradley Stoke is a new town centre which has been developed in response to the major growth which has occurred within this area over the past 20 years. The centre is dominated by a recently opened Tesco Extra store; however there are also a number of smaller units aimed at providing a mix of uses in the convenience, comparison and food-services sectors.

7.83 It is too early to determine whether Bradley Stoke will require any policy intervention in the future. However proposals which improve the diversity and bring other non retail uses into the town centre should be encouraged to promote a balanced and vibrant town centre in the future.

7.84 Filton offers a variety of retailers and a mix of different unit sizes. The Shield Centre offers the best of the comparison shopping and hence attracts the majority of visits to Filton. The parades on Gloucester Road and Church Road are mainly focused on provision of local convenience and comparison offer. Filton provides local retail and service provision for the surrounding population and should continue to function on this basis.

7.85 The Cribbs Causeway area contains an indoor shopping centre at the Mall, a collection of retail park style development, a leisure complex with cinema and restaurants etc, and a number of free standing stores.

7.86 The Mall, opened on 31 March 1998, comprises around 135 shops on two levels, although some of the large stores occupy more levels. The major businesses are Marks & Spencer, John Lewis, W H Smith and Boots. There is approximately 92,000 sqm floorspace and 7,000 car parking spaces.

7.87 The two retail parks are warehouse style shops built around car parking areas. The first retail park contains shops such as Argos, Currys, Comet and PC World. Nearby is a second retail park containing Carpet World, Halfords, Hobbycraft, T.K. Maxx, Easy Living Furniture, Maplin Electronics and Tesco Homeplus.

7.88 The leisure area is known as The Venue and features a VUE cinema, Fitness First and eateries, such as Frankie & Benny's, Bella Italia and T.G.I. Friday's.

7.89 There are also a number of free standing stores including an ASDA-Wal-Mart Supercentre, Morrisons supermarket, Wickes, Toys "R" Us, Makro and DFS, also car dealers, warehouses, pubs and hotels. A B&Q Warehouse situated near the Morrisons supermarket is now completed on the site previously owned by Tile World and Magnet.

7.90 This is a successful trading area and accounts for a large proportion of expenditure in South Gloucestershire and as a regional shopping centre also attracts spend from further afield.
The current role as a regional shopping centre can be potentially evolved to provide wider ranges of services and a transport system with less reliance on the car. The eventual aim should be the creation of a town centre, promoting a sustainable pattern of development and meeting the needs of South Gloucestershire. However, as previously discussed a change in status will need to be promoted at a regional level.

**Spatial proposals for Cribbs Causeway, Bradley Stoke, Filton and M32/Filton corridor**

7.91 Bradley Stoke as a new centre has had a recent provision of new floorspace and with only limited growth proposed within the local area it is considered that at this time there is no need to identify any further provision. However proposals for other town centre uses should be actively encouraged to improve vitality and viability.

7.92 Development opportunities at Filton are limited as the area is constrained by major roads and public open space. Major redevelopment would be required to facilitate significant floorspace provision at this centre, which is unlikely in the present economic environment.

7.93 Cribbs provides an opportunity to accommodate a large proportion of the identified floorspace need in South Gloucestershire. The configuration of the Mall, surrounding car parking and the retail warehouses all provide options to enable the creation of a town centre which is supported by a public transport system and improved linkages between existing office and residential areas and the new proposed areas for housing growth.

7.94 It is recommended that further detailed planning though an AAP or SPD is undertaken to produce a vision and plan for this area. The Core Strategy should include policy to provide guidance as to the circumstance and triggers that are required to enable further retail provision at this location.

7.95 As previously described the north fringe is to accommodate a large amount of growth over the plan period. Whilst Cribbs could potentially absorb some of the additional expenditure generated by this new growth there may also be potential to develop a new or improved retail and town centre area in the M32/Filton corridor. This ideally would be located in areas where the new growth is proposed, to encourage localism, provide a heart and focus for any new community and promote the creation of a sustainable pattern of growth.

**Strategy for East Fringe**

**Context and reasonable options for Downend, Emersons Green, Hanham, Kingswood and Staple Hill**

7.96 The East fringe of Bristol contains a number of traditional town centres, a new centre at Emersons Green and a large retail warehouse, supermarket and leisure complex at Longwell Green. The area has been identified for significant growth in the RSS and in particular urban extensions along the ring road. However South Gloucestershire Council is contesting this level of growth and is planning on the basis of a lower amount, especially in this area.

7.97 Whilst Kingswood is traditionally the main centre in the East Fringe both Longwell Green and Emersons Green account for a larger proportion of the expenditure. The other centres at
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Downend, Hanham and Staple Hill account for less than 1 per cent of comparison expenditure within the study area.

7.98 Kingswood town centre appears to be well supported at its centre but less successful on the periphery, with higher vacancy rates. The convenience and comparison sectors are comparable to national averages, albeit lower than average comparison floorspace. The centre has high representation from the other service uses such as accountants. These provide jobs and opportunity to encourage people into the centre to make linked trips.

7.99 Demand from national retailers is low, and although this is to be expected to an extent with the proximity of Bristol City Centre and to a lesser extent Cribbs Causeway. Provision of larger, modern units would likely attract more multiple retailers to the centre.

7.100 Kingswood should continue its role as a town centre, providing a wide range of retail, services and facilities to meet the needs of the local community. As a local service centre Kingswood should be promoted in a complementary rather than competitive role with Longwell Green.

7.101 Longwell Green is a collection of leisure and retail uses alongside the A4174 ring road. The leisure area, known as Aspects Leisure Park includes a multi-screen Vue cinema, 10-pin bowling alley, several restaurants and a gym. There is a swimming pool and a Laser Quest centre.

7.102 Several retailers are located on the other side of the ring road including an Asda superstore, a B&Q and other DIY stores such as Wickes and Homebase. There is also Jollyes pet superstore and Jenny's tack shop. Smaller shops include Tesco Express, Cherry Art Centre and several food outlets. An 8500sqm retail park with Boots, Next, Outfit, Clarks and New Look was opened in 2007. This was followed by the opening of The Carphone Warehouse, Clinton Cards and River Island stores in October 2008. A Marks & Spencer store with clothing, food and cafe opened in April 2009. Opposite the park are Richleys and Allied carpets.

7.103 It is arguable as to whether the level of floorspace and popularity of shopping in this area constitutes a good enough reason for Longwell Green to be identified as a town centre in a similar fashion to what is being proposed for Cribbs Causeway. However, unlike Cribbs, South Gloucestershire has indicated that this is not a preferred area for growth and as such will not require any further significant floorspace. By identifying it as a town centre it may provide scope to increase floorspace which does not reflect the desired development pattern and growth aspiration of the Council. If at a future stage the area around Longwell Green is identified for future growth then it maybe appropriate to reconsider its role.

7.104 Emersons Green is a relatively new purpose built centre intended to serve the surrounding housing growth. The centre is anchored by Sainsbury supermarket which is one of the highest supermarket traders within the study area. This store is complemented by a retail park style development which is backed by a modern but traditional style shopping parade. Overall the low vacancy rate and presence of multiple operators suggest that the town centre is performing well in retail terms. There are a range of retail uses and services including some limited evening economy potential.
With the development anticipated the other side of the ring road, which this centre abuts, it is likely to continue to perform well in the future. The centre should be allowed to expand to meet the needs of the new growth.

The three centres of Staple Hill, Downend and Hanham are all struggling to compete effectively within a changing retail and town centre environment. Staple Hill is the largest of these centres. Its linear form is not conducive to more modern patterns of shopping and it has a high level of vacancy and declining environment. At Hanham, whilst vacancy rates are lower, the close proximity to Longwell Green means that it unlikely to be able to directly compete. Whilst Downend appears to be trading relatively well, it is dominated by the service sector. Although the low vacancy rate is welcomed, the lack of retail offer means that there is limited choice and this may impact on vitality.

The roles of these centres are changing. In the past these town centres would have provided a broad mix of comparison and convenience shopping and associated service provision. In the present and future market it is unlikely that these town centres can directly compete with the larger centres and competition with each other may lead to their further weakening.

These centres should continue to provide local service provision and this should be encouraged and promoted. In order to prosper in the future these centres need to find their own niches, whereby they offer something different to the other centres and retail parks. There are successful examples of this elsewhere across the country, for example Hay-on-Wye on the Herefordshire/Wales border has concentrated on books, Wedmore in Somerset has high end and bespoke ladies fashion boutiques and Ludlow in Shropshire has encouraged high quality food outlets, including a sausage trail and Michelin starred restaurants.

Spatial proposals for Downend, Emersons Green, Hanham, Kingswood and Staple Hill

The centre of Kingswood is tired and in need of modernisation and possibly redevelopment, particularly around the Kings Chase Shopping Centre. It is considered that improving the town centre environment, possibly though the redevelopment of the shopping centre and the under utilised area between Somerfield and the main shopping street will have a positive effect on the overall vitality and viability of the centre - at present the centre could suffer from further decline without investment and with increasing competition and convenience from other areas. To help concentrate future investment and provide a shorter shopping circuit, consideration should be given to reducing the existing town centre through removal of policy protection areas at the periphery of the current centre.

The centre at Emersons Green is constrained by the ring road and dense housing surrounding the site. However, there is some opportunity to provide further floorspace to meet the needs of the new growth proposed on the other side of the ring road, within the existing town centre area. New floorspace could be accommodated by either allowing the land currently allocated in the Local Plan for indoor and outdoor leisure facilities to be used or by intensification of the existing centre though reducing the car park footprint and/or increasing the density of the shops by introducing more levels within the development.
7.111 In Staple Hill opportunity for further expansion is limited and probably not appropriate given its current trading issues. Redevelopment of the central area may be possible and could realise benefits of a more concentrated centre.

7.112 In Hanham there is a major opportunity for redevelopment to the south of the town centre on brownfield land currently identified as safeguarded employment land. It is understood that Tesco are interested in developing a store in this location and own the site. Whilst there is no generic quantitative need for new convenience floorspace in South Gloucestershire, there is a localised need for convenience floorspace in Hanham. The scale of convenience floorspace will need to be sufficient to alter shopping patterns to improve localism; however they should not have a detrimental impact on the existing centre and should meet the impact tests outlined in PPS4. In this location a supermarket of up to 2,500 sqm net selling mainly food (as defined in PPS4) is considered to be appropriate.

7.113 In Downend there is little opportunity for expansion without major redevelopment of the Willow Shopping Centre and adjacent car park. Improvements to the linkage between the car park, Somerfield and the rest of the town centre may realise some benefit to the town centre.

Planning policy strategy and implementation

7.114 Development Plan Documents should seek to identify areas where new development could potentially be accommodated. It has been demonstrated that there will be a requirement for significant additional floorspace in the long term, even after taking account existing commitments, this will need to be reflected in the appropriate Development Plan Document.

7.115 It will be important for future development plans prepared for South Gloucestershire to clearly define the role and function of the key centres and explain how they may develop their role and function within both the sub regional and regional hierarchy.

7.116 However as has already been discussed there are issues regarding how to reconcile the most appropriate location for the majority of the long term growth i.e. Cribbs Causeway and the potential to change its role in the hierarchy, with emerging policy in RSS. To help address this issue it is recommended that further work is commissioned to determine the capacity at Cribbs Causeway to accommodate further development and how it might become a ‘town centre’ - this work could then inform a review of regional policy and subsequently an Area Action Plan, which will provide detailed guidance regarding the scale, location and type of future growth in this area.

7.117 Across the other areas a number of measures could be used to further develop the strategy recommendations in this report. In the centres that have been identified as potential locations for future comparison growth i.e. Yate, Kingswood, Emerson Green and the potential new centre in the M32/Filton area suitable sites will need to be identified. Although some site suggestions have been made within this report further work is required to ascertain whether these are the most appropriate locations for future growth and identify what an appropriate scale of development would be, apply the sequential approach and test the impact of any potential development on the existing centre. Appropriate sites should then be identified in a development plan document to comply with national guidance.
In the centres with little or no proposed development, planning policies such as primary and secondary shopping frontages should be in place in development plan documents to protect the proposed roles of these centres. It will be important to provide flexibility within these policies to enable development which helps to maintain their identified roles.

This policy approach should be supported by an active town centre management regime, which will not only apply in these town centres but which could also be utilised in all the identified centres.

Town centre management can provide a coordinated proactive vehicle that can ensure that each town centre is considered in detailed, ensuring that issues are not overlooked and that they are tackled efficiently and most importantly effectively. The town centre management should be through a partnership which involves each town’s main stakeholders, especially those who may have decision making power and or access to funding which can assist in overcoming the identified issues. However, it is also important that representatives from a wide range of activities and interests are also included either directly with representation on the partnership or indirectly through regular consultation.

The partnerships could deal with a range of issues including environmental improvements, crime prevention and safety and marketing/promotion. Marketing and promotion in particular will be crucial in smaller centres seeking a niche to provide a complementary offer to their larger neighbours. However, the success of these partnerships is dependent on the cooperation with the local business community, stakeholder ownership, funding and decision making powers that can ensure real change.
Summary of Strategy and Recommendations

The suggested settlement hierarchy for South Gloucestershire is as follows:

<table>
<thead>
<tr>
<th>Position in Hierarchy</th>
<th>Centres</th>
</tr>
</thead>
<tbody>
<tr>
<td>Town Centre</td>
<td>Thornbury, Yate, Kingswood, Emersons Green,</td>
</tr>
<tr>
<td></td>
<td>Bradley Stoke</td>
</tr>
<tr>
<td>District Centre</td>
<td>Staple Hill, Chipping Sodbury, Hanham,</td>
</tr>
<tr>
<td></td>
<td>Downend, Filton</td>
</tr>
<tr>
<td>Local Centre</td>
<td>Smaller centres have not been defined as part</td>
</tr>
<tr>
<td></td>
<td>of this strategic study</td>
</tr>
<tr>
<td>Potential centre</td>
<td>Cribbs Causeway, M32/Filton corridor</td>
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</tbody>
</table>

For comparison goods there is a quantitative need of 65,500 sqm (net) of floorspace between 2009 and 2026. The quantum of distribution recommended is:

- 10 per cent of the need to each of the following: Yate, Kingswood, Emersons Green and ‘other’ town centres in South Gloucestershire (6,500 sqm net each)
- 30 per cent to Cribbs Causeway (19,650 sqm net)
- 20 per cent to District Centres in S Gloucestershire (13,100 sqm net)
- 10 per cent to a M32/Filton new centre (6,550 sqm net).

As the expenditure growth is greatest towards the end of the plan period and that population growth is driving the floorspace requirements, phasing of retail floorspace development should follow the phasing of household growth identified in the Core Strategy.

For convenience goods there is very little quantitative need, however, there is qualitative and localised quantitative need for new floorspace in Chipping Sodbury and Hanham, both of which experience significant leakage to the superstores at Yate and Longwell Green respectively. In each of these locations a supermarket size store of up to 2,500 sqm net (as defined in PPS4) would be a sufficient size reduce leakage whilst maintaining an appropriate scale to the role of the centre.

It is recommended that South Gloucestershire Council seek to change emerging RSS policy TC2 regarding Cribbs Causeway to allow for more retail growth in the long term. If this is successful the preferred strategy is to plan for an emerging town centre at Cribbs Causeway which would entail an increase in public and community services, enhanced accessibility and public transport links and to develop more of a mixed role with new office and residential development.

The spatial strategy for Yate Chipping Sodbury and Thornbury will be to continue the current development and remodelling of Yate town centre but to work further on the peripheral areas to address bulky goods provision and longer term town centre land take. Chipping Sodbury should retain a complementary offer to Yate, opportunity to expand behind existing units into courtyards offers potential, as does an appropriately scaled convenience store to the north of the town centre which should provide good pedestrian linkages to Broad Street. Thornbury has limited opportunity for growth of the town centre. The focus should be to improve quality and complement rather than compete with Cribbs Causeway.
The spatial strategy for **Cribbs Causeway, Bradley Stoke, Filton and M32/Filton corridor**: 

- Bradley Stoke has a new town centre and thus no further provision is required however other town centre uses can be encouraged.
- Filton has limited opportunity for change and thus maintaining and improving the existing stock is the preferred strategy.
- It is recommended that further detailed planning though an AAP or SPD is undertaken to produce a vision and plan for Cribbs Causeway with the longer term intention to create a town centre and an environment to meet the needs of the District’s comparison floorspace requirements.
- A new town centre with retail to be planned for a location in the M32/Filton corridor.

**Spatial strategy for the East Fringe:**

- Redevelopment of Kingswood’s centre should be supported. Policy to consolidate the town centre with limited protection of the periphery.
- Retail need arising from growth of Emerson Green to the east of the ring road should be accommodated within the existing town centre through intensification and remodeling over time.
- Staple Hill, Hanham and Downend should promote a complementary offer that provides a unique retail environment in addition to the continued provision of local level services to serve their local community.
- Hanham has a major redevelopment opportunity and the study has identified localised need of a convenience store in this area.