Topic Paper: Retail & Town Centre Planning Policy Matters

South Gloucestershire Local Plan

ON BEHALF OF SOUTH GLOUCESTERSHIRE COUNCIL

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1. Introduction

1.1 This Topic Paper on retail and town centre planning policy issues has been prepared by Nexus Planning ('Nexus') for South Gloucestershire Council ('SGC') in relation to the new South Gloucestershire Local Plan. It is intended to provide an additional document for the Local Plan's evidence base library and assist SGC as it prepares the next stage of the draft Local Plan (Regulation 19) and its subsequent submission to the Secretary of State for Examination.

1.2 At the present time, the main part of the development plan in South Gloucestershire consists of the Core Strategy and the PSP Plan. Insofar as retail and town centre land use issues are concerned, the Core Strategy provides the strategic direction for South Gloucestershire, including the town centre hierarchy, a town centres strategy and a 'global' district-wide assessment of need for new retail floorspace. The PSP Plan took forward the contents of the Core Strategy and allocated sites to meet the identified need for retail floorspace, along with further planning policies surrounding 'town centres' and general development management issues.

1.3 The new Local Plan will replace part of the content of the Core Strategy and the PSP Plan (with some adopted policies being saved). Insofar as town centre planning policy is concerned, the new Local Plan is intended to provide a new strategic policy for the defined 'town centre' hierarchy in South Gloucestershire, including the identification of new centres, along with the preferred location for new retail and main town centre land uses.

1.4 Four Regulation 18 consultations have taken place for the new Local Plan: the first between November 2020 and March 2021, the second between February 2022 and April 2022, the third between December 2023 and February 2024 and a fourth (additional) consultation taking place between July and September 2024. A Regulation 19 consultation is planned for early 2025.

1.5 SGC has received a number of representations from key stakeholders, landowners / landlords and investors across a range of issues related to retail, leisure and town centre land use planning, and these representations have been considered in the context of the scope and content of this Topic Paper.

1.6 In order to support the Regulation 19 consultation version of the draft Local Plan and its subsequent submission to the Secretary of State, SGC have identified a requirement for additional supporting evidence base material on retail and town centre issues. SGC's main requirements for this Topic Paper are:

a. Given that the previous SGC development plan evidence base retail studies were produced in 2010 and 2011, and supplemented by additional work in 2014 & 2015, there is a requirement for the Local Plan evidence base to be informed by information and analysis on up-to-date retail, leisure and town centre trends.

b. To provide updated evidence regarding the changing pattern of land uses in the main 'town centres' in South Gloucestershire.

c. An assessment of how previously assessed needs have been met and a review of the draft new Local Plan position which does not seek to make further specific retail land use allocations.

d. A review of the planned new local centres within strategic land allocations, including the need for, and the content of, these centres.

e. Advice on development management policies and proposal amendments to Town Centre and Primary Shopping Area boundaries.

1.7 The remainder of this document is structured in the following manner:

a. Section 2 provides a review of the background and context to the main town centres and retailing issues in South Gloucestershire, including a summary of the previous stages of preparation of the new Local Plan insofar as they relate to retail and town centre issues. Section 2 also provides a review of current national planning policy for retail and main town centre uses, along with legislative changes which have occurred since the adoption of the Core Strategy and PSP Plan documents.

b. In order to provide up-to-date evidence base data for this Topic Paper, Section 3 provides a review of retail and town centre trends, including how the environment for retail and town centre land use issues has evolved since the preparation of previous evidence base documents in South Gloucestershire and during the course of preparing the new Local Plan.

c. In order to support the town centres and retail land use strategy in the new Local Plan, Sections 4, 5 and 6 address a number of factors, including: (1) the hierarchy of defined 'town centres' across the South Gloucestershire administrative area; (2) whether there is a requirement to allocate additional land for retail land uses in the new Local Plan (beyond existing and proposed 'town centres' and commitments); (3) the approach to planning for new 'town centres' in the South Gloucestershire; and (4) advice on specific planning policies and designations within the new Local Plan.

d. Finally, in Section 7 we provide a summary of the content and finding of this Topic Paper, including our recommendations for the content of the new Local Plan.

1.8 Supporting documents referred to in the main text of this report are contained in appendices which can be found at the rear of this document.

2. Background & Context Issues

Introduction

2.1 In order to set the scene for this Topic Paper and the forthcoming Regulation 19 consultation, it is helpful to provide a brief review of main background and context issues for town centre and retail planning issues across South Gloucestershire. In particular, this context should:

a. Explain the current retail and town centre land use planning framework in the South Gloucestershire development plan;

b. The content of the emerging new Local Plan for South Gloucestershire insofar as retail and town centre planning issues are concerned; and

c. The changes which have taken place within national planning policy and legislation since the adoption of the key parts of the current development plan.

2.2 Each aspect is discussed in turn below.

Planning Policy for Retailing and Town Centres in South Gloucestershire

2.3 The two main policies in the development plan which deal with town centre and retail land use issues are Policy CS14 of the Core Strategy and Policy PSP31 of the PSP Plan. The Core Strategy was adopted in 2013 and, in terms of retail, leisure and main town centre issues, was informed by evidence gathered in 2010 and 2011[1].

2.4 Policy CS14, which deals with retail and town centre issues, is divided into separate sections:

a. The hierarchy of 'town centres', including town centres, district centres, plus local centres and parades[2].

b. A strategy which directs 34,000sq m of new comparison goods floorspace (by 2026) to town and district centres, with locations to be identified via the PSP Plan.

c. A strategy for local centres and parades which is focused upon meeting local needs.

d. A suite of general retail, leisure and main town centre land use planning policy principles, including an impact assessment threshold of 1,000sq m gross and a confirmation that the PSP Plan will deal with town centre and primary shopping area boundaries for the main defined 'town centres'.

2.5 Based upon the strategy set by the Core Strategy, the PSP Plan provides additional planning policies in relation to the assessment of development proposals within defined 'town centres' and also the assessment of proposals for retail, office and leisure uses in edge and out of centre locations. Based upon further evidence base work surrounding the scale of the identified quantitative need for net additional comparison goods floorspace, the PSP Plan distributed around half of the Core Strategy (CS14) quantitative need to six defined 'town centres' in South Gloucestershire (which sought to meet quantitative needs up to 2021). These locations are: Bradley Stoke, Kingswood, Emersons Green, Filton, Yate and Stoke Gifford.

[1] South Gloucestershire Council 'Town Centres and Retail Study' (April 2010) (Roger Tym & Partners) and South Gloucestershire Council 'Retail Study Update and Impact Assessment' (December 2011) (Roger Tym & Partners).
[2] The policy confirms that Cribbs Causeway and The Mall, plus Longwell Green and Abbey Wood retail parks, are to be treated as out of centre locations in policy terms

2.6 Policy PSP31 also outlined the policy framework for assessing relevant proposals against the sequential and impact policy tests and also setting a revised impact assessment threshold of 350sq m gross for retail proposals, alongside continuing with the 1,000sq m gross threshold for office and other main town centre land use proposals. PSP31 also set out general development management considerations for all main town centre land use proposals, including specific policies on markets and garden centres.

2.7 Beyond PSP31, the PSP Plan also provides separate policies for local centres, parades and facilities (PSP32), shopping frontages (PSP33), public houses (PSP34) and food/drink uses (including drive-through developments) (PSP35).

2.8 As set out above, the retail and town centre elements of the Core Strategy and PSP Plan documents were informed by a series of evidence base studies, including:

a. Core Strategy: The South Gloucestershire Retail Study 2010 and the South Gloucestershire Retail Study Update & Assessment 2011 (both produced by Roger Tym & Partners)

b. PSP Plan: the South Gloucestershire Retail Capacity Study 2014 and the June 2016 Centres Update Note.

The Draft New Local Plan

2.9 The first Regulation 18 stage of consultation for the new Local Plan took place between November 2020 and March 2021, with an 'Issues and Approaches' document (also known as the Phase 1 consultation). This consultation included detailed information on the challenges, issues and potential priorities for the new Local Plan. This was followed in early 2022 by a Phase 2 consultation, which focused upon a more detailed discussion on where growth, change and protection across South Gloucestershire might take place. At the time of the Phase 2 consultation, the West of England Spatial Development Strategy ('the SDS') was also in preparation, which has now been abandoned.

2.10 The third phase of Regulation 18 consultation, took place between December 2023-February 2024, set out three alternative 'lenses' for meeting the needs for housing, employment and infrastructure required from the Local Plan which informed the emerging preferred strategy. A fourth phase of consultation between July-September 2024 included clarifying the process for site selection within the emerging preferred strategy and the Council's approach to whether it can assist with meeting any of Bristol City Councils unmet housing need.

2.11 A new overarching Town Centres policy to replace policies CS14 and PSP31 was consulted upon in Phase 3. with the new policy structured to include:

a. The hierarchy of defined 'town centres' across South Gloucestershire

b. The identification of new 'town centres'

c. The approach to land use management and development proposals in primary shopping areas and wider town centres

d. The approach to the application of the sequential test and the impact policy test for edge and out of centre proposals for main town centre uses

e. The approach to markets and garden centres; and

f. The general approach to the assessment of proposals for main town centre uses, in all locations.

2.12 The proposed new Town Centres policy will be accompanied by updated town centre and primary shopping area boundaries. In addition, alongside the new Town Centres policy, the Phase 3 consultation proposed to:

a. Save and retain Policy PSP32 – local centres and parades

b. Delete Policy PSP33 – retail frontages

c. Save and retain Policies PSP34 and PSP35 – public houses and food & drink uses

2.13 The content of the proposed new Town Centres policy, along with the content of Policy PSP32 is discussed in more detail later in this document.

National Planning Issues

2.14 Given the age of the two main elements of the current development plan it is also useful to outline the various changes at the national level which may have an impact, to one extent or another, on the retail and town centres strategy in the new Local Plan. As a consequence, this sub-section refers to national planning policy, new planning legislation affecting town centres, and also national planning practice guidance.

National Planning Policy

2.15 The core strategy was submitted for examination prior to publication of the 2012 version of the NPPF, and it was adopted in 2013. The 2012 NPPF was however in force at the time of preparing, examining and adopting the PSP Plan. The first revision to the NPPF came in 2018, one year after the adoption of the PSP Plan. Subsequent changes were published in 2019, 2021,2023 and 2024.

2.16 Despite the number of different versions of the NPPF over the past 12 years, the general approach to planning for town centres, in relation to both plan-making and decision-taking, has not changed in any significant way. In particular:

a. It remains the case that the two key policy tests for development management (for edge and out of centre proposals) are: the application of the sequential test for main town centre land use proposals, along with the assessment of the likely impact of relevant proposals on the health of, and investment within, defined 'town centres'.

b. The requirement, originally set out in the 2012 NPPF, to assess the likely impact of edge and out of centre office development proposals has now been removed. Impact assessments are now only required for edge and out of centre retail and leisure proposals which are not in accordance with a development plan.

c. In relation to the sequential test, recent versions of the NPPF have updated of the test of 'availability' to make it clear that available sites can be those which are 'expected to become available within a reasonable period').

d. Providing a slightly slimmed-down version of the impact test which removes reference to specific time periods for the assessment of likely impacts.

e. A refined set of principles and polices for plan-making, which take into account the changing nature of 'town centres' and legislation on planning matters. In particular, whilst Class E (see below) is not specifically referred to, paragraph 90(a) of the December 2024 version of the NPPF now includes references to diversity in town centre planning, whilst there has been a decision to cease requiring local authorities to define primary and secondary shopping frontages in the town centres. There has also been a change in favour of planning to

meet identified needs over a 10 year period rather than 'meeting needs in full' (or over the whole of the plan period).

2.17 Based upon the likely date for the Regulation 19 consultation, along with the submission of the new Local Plan for Examination, the new Plan will be assessed against its conformity with national policy as contained within the December 2023 version of the NPPF.

Legislation

2.18 In recent years, in response to the on-going challenges faced by town centres and high street retailers (and other commercial uses), national government has introduced more flexibility into the permitted development rights system. Permitted development has long been an element of the planning system in England although, over time, further flexibility was been introduced in order to allow for changes, in certain circumstances, between some main town centre land use classes.

2.19 Since the adoption of the PSP Plan there have been two major changes in the use classes order and permitted development right. First, in July 2020, the government introduced a significant change to the land use classes order. The changes came into effect in September 2020 and revoked Parts A and D of the existing use classes order. In relation to retail and main town centre uses, the changes were as follows:

a. A new Class E was introduced which encompasses the former A1, A2, A3, B1a, B1b, B1c and part of the D2 use class (for gyms and indoor recreational facilities)

b. The former A4 and A5 uses have now become sui generis uses, along with part of the former Class D2 uses comprising cinemas, concert halls, bingo halls and dance halls. The remaining former Class D2 uses (community halls, swimming pools, skating rinks and outdoor sport and recreation uses) are now placed into Use Class F2.

c. The uses within the former Class D1 are split between the new Use Class E (health care uses, creches, day centres) and the new Use Class F1 (schools, museums, libraries, halls courts and places of worship).

2.20 Following the September 2020 use class order changes, the Government introduced permanent changes to permitted development rights (following a transitional period between September 2020 and July 2021), which focus upon changes to residential use, refinement of rights in relation to office to resident use, and the expansion of rights under the new class MA. These came into effect from August 2021.

2.21 The key aspects of the August 2021 changes can be summarised as follows:

a. Previous permitted development rights under classes O and M (office to residential and retail to residential) ended on 31st July 2021.

b. The introduction of the new class MA (business and commercial to residential) and its expansion to include the whole of Use Class E (shops, offices, restaurants/cafes, health services, gyms, nurseries and leisure).

c. Permitted development to change from Use Class E (commercial, business and service) to a use falling within Use Class C3 (dwellinghouses) will be subject, in certain circumstances, a number of prior approvals. There will also be limitations / exclusions, including the introduction of a size limit of 1,500sq m per building. Previously, in relation to the change from office to residential, there was no upper size limit.

d. The automatic exclusions to this new right include buildings on land covered by, or within the curtilage of, designations such as SSSIs, Listed Buildings, a scheduled monument, an AONB, or a World Heritage Site. It is notable that Conservation Areas are not included in these automatic exclusions.

2.22 The most recent change to national planning legislation affecting town centres is an element of the Levelling-Up and Regeneration Act 2023 ('LURA') which has allowed for the introduction of high street rental auctions ('HSRA'). Provisions for HSRAs commenced in early December 2024 and allow local authorities to arrange for a high street rental auction to be carried in relation to premises (formerly in a high street use, but now vacant) in a street or town centre designated by the local authority under the LURA. These provisions are intended to tackle persistent vacancies in town centres and are accompanied by changes to the Town and Country Planning (General Permitted Development) (England) Order 2015 to provide a new permitted development right for those premises subject to a successful auction to change use (where necessary) for the duration of the tenancy period.

National Planning Practice Guidance

2.23 The NPPF is supported by the Planning Practice Guidance ('PPG'), which is an on-line resource, originally published in 2014 and updated from time-to-time. The PPG was last updated in relation to retail and town centre planning policy matters in 2020 and includes guidance for local authorities (for their plan-making and decision-taking functions) and also for applicants applying for planning permission in relation to:

a. Town centre strategies;

b. Development and change of use proposals within town centres (taking into account the changes in the Use Classes Order in 2020); and

c. Guidance on the application of the sequential and impact planning policy tests, in both plan-making and decision-taking.

2.24 The contents of the current version of the PPG have been used, where appropriate, to inform the content of this Topic Paper.

3. Retail & Town Centre Trends

3.1 A key part of the evidence base for this Topic Paper on town centres and retail land uses is an examination of retail and town centre trends. Like any land use sector, trends and external factors will have an influence on how a local authority will plan for individual land uses and how it will develop strategic planning policies to guide development and other regeneration initiatives.

3.2 In the case of town centre and retail issues, we consider that two broad areas should be examined: (a) national issues and trends; and (b) local issues in and around South Gloucestershire. Within these areas, it is important to consider events which have occurred since the preparation and adoption of the various parts of the development plan (along with the associated evidence base library) including how actual events may have matched or diverged from previous forecasts and assessments.

3.3 Both national and local issues are considered in turn below.

National Trends

GDP

3.4 Over the course of 2023, and into early 2024, the UK economy saw little in the way of economic growth, with pressures from high inflation and elevated interest rates meaning that spending and investment by consumers and businesses has shown little upwards movement. Though growth in 2023 was positive compared to 2022, the UK economy fell into a mild technical recession in the second half of 2023 after two consecutive quarters of contraction (-0.1% in q3 2023 and -0.3% in q4 2023). On an average basis (considering income, expenditure, and output measures) UK GDP in 2023 was estimated to have increased by only 0.1% compared with 2022.

3.5 Following the contractions in the second half of 2023, the UK economy rebounded in the first half of 2024, with GDP-growth driven by business-facing services (which grew faster than consumer-facing services). Growth was +0.7% in the first quarter and +0.5% in the second quarter. However, the economy barely grew in the third quarter, at just +0.1%, dragged down by a slide in manufacturing activity.

Consumer Spending

3.6 As consumer spending accounts for around 60% of GDP, the financial health of households and their willingness to spend are crucial factors in determining an economy's performance. Traditionally, consumer spending is the driving force behind GDP growth in the UK. In recent years, however, this has not been the case. First, the Covid-19 pandemic and associated lookdowns resulted in temporary large drops in spending and big changes to spending patterns (such as a greater share of spending on goods and less on services). Then, just as spending had recovered to its pre-pandemic level, the period of high inflation in 2022 and 2023 squeezed household budgets, resulting in stagnant spending in real (inflation-adjusted) terms.

3.7 Household incomes, on average across the country, have increased since 2023 mostly because wage growth has been higher than inflation. As of mid-2024 this hadn't led to a noticeable increase in consumer spending, but forecasters believe that spending growth will accelerate heading into 2025. The consensus forecast among economists surveyed in October was for consumer spending to rise by 0.7% in 2024 and by 1.3% in 2025. This seems largely due to the improvement in household incomes, with further gains anticipated in 2025. A further boost to spending could come from households saving less than they have in recent years. The proportion of income that households saved rose from 4.5% of total income in Q2 2022 to 10.0% in Q2 2024, a relatively high rate historically (excluding the pandemic).

3.8 In addition, consumer confidence has improved and hit a three-year high in July and August 2024. It did, however, fall in September 2024. It is likely that the new Labour government's warnings about the state of the economy and "difficult decisions" announced as part of the Budget might be factors behind the deterioration in confidence.

Business Investment

3.9 Companies in recent years have faced rising costs (including for staff and fuel costs), weak demand, a high level of uncertainty, and higher borrowing costs as interest rates rose. One consequence has been that business investment has struggled to expand. In the second quarter (Q2) of 2024 business investment was around the same level as it was before the pandemic in Q4 2019. The 2016 Brexit referendum raised uncertainty for businesses, which studies suggest resulted in lower investment than would otherwise have been the case. This was followed by a sharp, temporary, fall during the pandemic.

3.10 As costs ease and as interest rates are poised to fall, conditions for business investment appear to be improving. Some, though not all, surveys suggest that businesses are intending to invest more, although any increases are likely to be modest. In August, the Bank of England forecast that business investment would grow by around 2% per year in 2025 and 2026. Forecasts by the National Institute of Economic and Social Research think tank similarly expect annual growth of between 2% and 3% in business investment over 2025 and 2026.

3.11 Policy measures announced at the Budget (see later in this section) will affect businesses. In the months leading up to the Budget, some business surveys, such as the Lloyds Bank Business Barometer, have reported business confidence falling somewhat. Some business groups have voiced concerns over potential tax rises in the Budget. A survey of businesses conducted in August and September by the British Chambers of Commerce found that 48% of firms said taxation was more of a concern than it was three months before. That is up from 36% in the previous survey and around the same level of concern as inflation (46% of firms reporting it a concern).

Unemployment

3.12 The unemployment rate remains low by historical standards, with the official measure produced by the Office for National Statistics (ONS) standing at around 4% since 2022. The ONS estimates that the proportion of adults of aged 16 to 64 in work – the employment rate – has also remained stable at about 75% since 2022. However, the survey the ONS conducts to provide this labour market data has had problems with data quality: fewer people are responding to the Labour Force Survey, making it less reliable. Because of these issues, there has been a greater focus on other indictors. For example, the Bank of England uses a variety of data sources to gauge trends in employment and unemployment. In September, the Bank's Monetary Policy Committee noted that an in-house model "suggested that underlying unemployment had increased steadily over the past few quarters".

3.13 Looking at a range of other indicators, it appears that demand for labour is easing, with fewer job vacancies in the economy. Following a surge as the country emerged from the Covid-19 lockdowns, the number of vacancies has now returned to its pre-pandemic levels after declining since mid-2022.

Inflation

3.14 The annual rate at which prices of goods and services in the UK are rising – the consumer prices index (CPI) inflation rate – has slowed since reaching 11.1% in October 2022, a 41-year high. In September 2024, the inflation rate was 1.7%, down from 2.2% in August 2024 and the lowest since April 2021.

3.15 Economists generally expect inflation to pick up again over the rest of the year, largely because of an increase in household energy bills. The average forecast among economists surveyed by the Treasury in the first half of October 2024 was for inflation to be 2.2% in Q1 2025.

Interest Rates

3.16 In August 2024, the Bank of England's Monetary Policy Committee (MPC) cut interest rates for the first time since the pandemic. The benchmark 'bank rate' was lowered from 5.25% to 5.0%. The MPC's previous cycle of interest rate rises came in response to the period of high inflation discussed in the previous section. The MPC raised rates to reduce the risk that inflation remained persistently above its 2% target. The 2% target is set by the government and refers to the annual change in the Consumer Prices Index (CPI) measure of inflation. In theory, higher interest rates reduce inflation by raising the cost of borrowing. As people and businesses have less money to spend (because taking on debt becomes more expensive) and more incentive to save, demand for goods and services in the economy is diminished.

3.17 The MPC has signalled that interest rates are on a downward trajectory, and the Bank of England lowered rates again, to 4.75%, in early November 2024. However, at the same time as lowering rates, the Bank of England signalled that a further move is unlikely before early 2025 as it forecast that the Autumn 2024 budget would increase inflationary pressures. In a press conference following the rate announcement, the Banks said that it would take "a gradual approach" to future cuts as it waited to see how price pressures developed. The outlook has also been affected by Donald Trump's victory in the US election, particularly because of his support for higher tariffs, which many economists argue could stoke inflation.

The Autumn 2024 Budget

3.18 At the end of October 2024, the new Labour government announced its first budget, which was held by many people to comprise an expansionist 'tax and spend' budget. Taxes will rise by around £40bn, with the biggest revenue raiser being an increase in employers' national insurance contributions. As part of the budget, the government's fiscal rules were changed which enabled considerably higher levels of borrowing for capital investment, particularly in relation to the NHS, housing, education and green energy. The biggest winner from the Budget announcements was health care, which is set to enjoy the largest real-terms increase in spending since 2010 (outside of the pandemic).

3.19 A key consequence of the rise of employers' national insurance contributions is the impact that it will have on company finances. Whilst there is an exemption for very small businesses, costs will rise for other businesses with fears that this may have an impact on other areas such as wage growth, job creation and investment decisions. Some commentors and businesses have raised fears that the latter of these factors may lead to knock-on effects for retail and leisure facilities on the high street and elsewhere in towns, cities and rural locations. Such a potential trend will, of course, need to be monitored in terms of town centre health issues surrounding land use trends, vacancies and investment projects.

3.20 A further announcement in the budget was in relation to business rates. The costs associated with business rates have long been held as a key influence on retail and leisure business performance, particularly for high street retailers. In the budget it was announced that, from 2026-2027, the government intends to introduce two permanently lower tax rates for retail, hospitality and leisure properties, which will, in turn, be paid for by a higher multiple for the most valuable properties. Alongside this, it was announced that there will be 40% relief on business rates for the retail, hospitality and leisure industry in 2025-2026 up to a cap of £110k per business.

A Closer Look at the Retail Sector

3.21 Taking the above factors into account, Table 3.1 below provides a summary of Experian's 'central case' forecast for retail sales growth and associated floorspace requirements at the UK level from 2023 to 2032 and 2040 (taking into account the impact of special forms of trading (i.e. internet shopping) and floorspace efficiency gains). It shows that efficiency gains in floorspace are likely to match retail sales growth minus special forms of trading ('SFT')[3] up to 2032, thus leading to a situation where there is nil / negligible growth in retail floorspace. Over the longer term, to 2040, the outlook is expected to improve slightly, although the potential for net gains in floorspace remains very low, at 0.1% per annum and 2.0% overall between 2023 and 2040.

Table 3.1: retail sales growth, efficiency gains and floorspace requirements

	% change per annum 2023 - 2032	Cumulative Growth, 2023-2032 (%)	% change per annum 2023-2040	Cumulative Growth, 2023-2040 (%)
Retail sales growth	1.4	15.2	1.8	37.6
Retail sales growth, less SFT adjusted for sales from stores	0.8	8.7	1.3	26.1
Efficiency gains	0.8	8.5	1.2	24.0
% increase in floorspace required after efficiency gains (sales growth less efficiency gains)	0.0	0.2	0.1	2.0

Source: Experian, 2024

3.22 In order to get a broader picture of floorspace requirements, the above figures should also be read alongside vacancy levels across the country. According to figures from Experian's GOAD database, the UK retail store vacancy rate fell in 2023 for the first time since 2016, though still stands at a high rate of 18.9% (from 19.2% in 2022). However, this is still 4.7 percentage points above pre-pandemic 2019 levels and indicates that almost one fifth of space within the UK's main traditional retail centres (city, town and district centres) is empty. This national situation should, however, be compared with local circumstances in South Gloucestershire, which is covered later in this section.

3.23 Alongside sales growth, it is also important to examine retail spending volumes, as this type of forecast is a key input into local authority retail floorspace capacity assessments, such as those completed in 2010 and 2011 to inform the South Gloucestershire Core Strategy. Table 3.2 below compares the forecast annual changes in retail expenditure per head on comparison goods from the time of the 2011 Retail Study and the latest available forecasts from Experian. It shows the year-on-year change forecasts contained within Experian's Retail Planner Briefing Note No.9, which was used in the 2011 Retail Study, and compares this against the latest forecasts from Experian's Retail Planner Briefing Note 21[4] for the same period.

[3] 'Special forms trading' is defined as retail sales not found in traditional shops, such as internet shopping. Given that some SFT sales are fulfilled via stock sourced from traditional 'physical / bricks and mortar' stores an adjustment is made for this element for the purposes of retail planning expenditure / quantitative need forecasts.
[4] Published in 2024

Table 3.2: forecast year-on-year change in per capita comparison goods spending between 2010 and 2026

	Retail Planner 9 (2011) % Growth p.a.	Retail Planner 21 (2024) % Growth p.a.
2010	0.1	2.1
2011	0.5	-1.3
2012	1.6	0.8
2013	2.1	4.1
2014	3.0	1.0
2015	3.0	5.5
2016	3.0	4.4
2017	3.0	3.7
2018	3.0	0.4
2019	3.0	2.9
2020	3.0	-7.9
2021	3.0	8.1
2022	3.0	-3.3
2023	3.0	-3.3
2024	3.0	-1.2
2025	3.0	2.7
2026	3.0	3.7

Source: Experian

3.24 The above table indicates that the latest Experian forecasts are showing a noticeably lower rate of actual and forecast growth in comparison goods spending between 2010 and 2026 than the purely forecast based growth data available at the time of the 2011 Retail Study. In 2011, the cumulative forecast growth in spending per head on comparison goods (between 2010 and 2026) was circa +43%. However, the latest forecasts from Experian show an actual growth between 2010 and 2023 (plus forecasts between 2023-2026) of circa +20%.

3.25 For the avoidance of doubt, it should be noted that the data presented in Table 3.2 enables a like-for-like comparison between expenditure data provided by Experian. However, the 2011 Retail Study used a blend of forecasts from both Experian and Pitney Bowes, which produced an even higher set of forecasts between 2010 and 2026, equivalent to a growth of around +60% over that period.

3.26 The same exercise as contained in Table 3.2 is replicated for convenience goods expenditure per head in Table 3.3 below. Apart from the exception years around the COVID-19 pandemic, the convenience goods spending levels per head have traditionally had a lower level of change. Nevertheless, the general trends outlined above in relation to comparison goods spending are also replicated for convenience goods. At the time of the 2011 Retail Study, Experian's forecasts gave a cumulative growth of +7.1% between 2010 and 2026. However, the latest data from Experian shows that actual (2010-2023) and forecast (2023-2026) change is -6.8%.

Table 3.3: forecast year-on-year change in per capita convenience goods spending between 2010 and 2026

	Retail Planner 9 (2011) % Growth p.a.	Retail Planner 21 (2024) % Growth p.a.
2010	0.8	-3.5
2011	-0.3	-0.3
2012	-0.4	-3.0
2013	0.5	-2.2
2014	0.5	-2.1
2015	0.5	-1.1
2016	0.5	4.1
2017	0.5	1.7
2018	0.5	-0.2
2019	0.6	-1.0
2020	0.6	8.6
2021	0.6	-1.7
2022	0.6	-5.8
2023	0.6	-3.0
2024	0.6	-0.5
2025	0.6	-0.2
2026	0.6	-0.1

Source: Experian

3.27 It should be noted that the expenditure per head figures in Tables 3.2 and 3.3 above are total levels, including spending via special forms of trading (i.e. internet shopping). When the forecasts adopted in the 2011 Retail Study and the latest Experian are compared then there are also some noticeable differences, as shown in Table 3.4 below. It shows that whilst there is very little difference between the proportions for convenience good expenditure, there is a material difference for comparison goods. This difference became more pronounced after 2016. The implication of higher proportions of spending via the special forms of trading / internet channel is to reduce the amount of expenditure available for 'physical' stores and, in turn, reduce quantitative requirements for additional floorspace.

Table 3.4: special forms of trading allowances for convenience and comparison goods expenditure, 2011-2026 (% proportion retail sales not associated with physical stores_

	2011 Retail Study – Convenience SFT (SFT as % of total expenditure)	2011 Retail Study – Comparison (SFT as % of total expenditure)	2024 Experian Forecast – Convenience SFT (SFT as % of total expenditure)	2024 Experian Forecast – Comparison SFT (SFT as % of total expenditure)
2011	5.5	12.8	1.3	9.4
2016	6.3	14.4	2.7	14.0
2021	6.5	14.7	5.8	28.5
2026	6.5	14.7	5.8	26.0

Notes: 2024 Experian SFT data has been adjusted for sales associated with physical stores

3.28 Looking to the future, Table 3.5 below summarises Experian's 'headline' retail and leisure spend per head forecasts up to 2040, based upon their 'central case' scenario. In order to show the various trends over time, Table 3.4 shows trends over the past two decades, alongside individual annual forecasts for 2023, 2024 and 2025, followed by medium and long-term forecasts to 2030 and 2040 respectively.

Table 3.5: UK retail and leisure spend per head – actual data for 1998-2022 and forecasts for 2023-2040

Volume % Growth Per Head	1998-2022 (annual average)	2012-2022 (annual average)	2023	2024	2025	2026-2030 (annual average)	2031-2040 (annual average)
Retail spend	0.7	0.9	-3.2	-0.9	1.5	1.9	2.0
Convenience goods	-1.7	-0.3	-3.0	-0.5	-0.2	0.0	0.1
Comparison goods	2.0	1.7	-3.3	-1.2	2.7	3.1	2.8
Bulky comparison	3.3	1.5	-4.7	-1.8	3.7	3.8	3.5
Non-bulky comparison	0.9	1.8	-2.8	-0.9	2.3	2.8	2.6
Leisure	-1.5	0.7	-1.3	-0.3	0.6	1.1	0.8
Consumer spending	1.2	0.9	-0.8	-0.5	0.9	1.5	1.6
Retail spend, ex SFT	1.7	-0.2	-2.6	-2.2	0.4	1.3	1.6

Notes: Experian, February 2024

3.29 The content of Table 3.5 shows:

a. The decline in spending across all types of retail goods between 2023 and 2024, a situation which is also being felt in the leisure sector.

b. Following declines in 2023 and 2024 (in addition to a fall of -4.3% in 2022), growth in retail and leisure spending is expected to return in 2025. Overall, retail spend per head is expected to grow by 1.5% although only one quarter of this (0.4%) is expected to the directed towards physical retail stores in town centres and retail parks (with the remainder being attracted by internet shopping).

c. The only sector not expected to grow in 2025 is the convenience goods sector, which could contract by -0.2%. This continues a long-term trend for the convenience goods sector.

3.30 Alongside data on retail and leisure expenditure, it is also important to examine trends in the retail sector in terms of the presence of retailers and leisure uses in high streets and out of centre locations as this can also help to understand the wider aspects of 'need' from a commercial viewpoint.

3.31 It is a well-established fact that the retail and leisure sectors, which have been a mainstay in all UK high streets and, more latterly, out of centre retail/leisure parks, have fast-moving trends. Over the latter half of the 2010s and the early 2020s there have been a number of high-profile business casualties. Within the non-food sector businesses such as Paperchase, Debenhams, Topshop (and other parts of the Arcadia Group), Carpetright, Ted Baker and Poundworld have all failed. In addition, there have been a significant number of store closers by other high profile national multiple retailers such as House of Fraser (now trading as Frasers) and Argos (with the brand moving into Sainsburys stores). For many years, the DIY and homewares retailer Homebase has faced a number of difficulties, and has changed hands on a number of occasions. In November 2024, Homebase entered into administration, with CDS (owner of The Range) buying a number of existing stores, although uncertainty currently surrounds the future of around 50 other Homebase units.

3.32 The closure of these stores has created significant vacancies and available retail floorspace in many town and city centres. Some stores, such as those in high-profile locations and/or in modern format premises, have been re-occupied by other comparison goods retailers, although this has not been universal. For example, former department store units occupy large multi-level premises, many of which were built in the post-war period specifically for that particular purpose.

3.33 As a result, their attractiveness to alternative uses, even other comparison goods uses, is limited, which has resulted in many long-term vacancies. In some cases, alternative non-retail uses are being promoted as landlords and local authorities have reached the realisation that continued retail use is simply not an option. That has resulted in redevelopment proposals (such as the former Debenhams in Bristol city centre), along with re-use for education and leisure uses. An example of re-use for education use can be found in Gloucester city centre where the former Debenhams has been converted to a new campus building for the University of Gloucestershire. In another example, the former Debenhams in Bristol city centre is proposed to become an indoor skate park facility. For those former department stores which have found a replacement retail use, the two most notable examples in the West of England area is the decision of Marks & Spencer to re-occupy the former House of Fraser store at Cabot Circus in Bristol and the former Debenhams at Southgate in Bath city centre.

3.34 One other change in the format of a well-known national comparison goods retailer to note is Ikea. Known for its large format out-of-centre stores, Ikea has in recent years decided to branch out into smaller city centre stores which display a smaller range of goods. The first stores for this format include Hammersmith (which will soon also be accompanied by its first stand-alone restaurant), the forthcoming Oxford Street store[5] and Brighton[6].

3.35 Across the UK's high streets and other retail premises there have been some significant changes between 2010 and 2023. Data from Public First and the Financial Times has highlighted the following trends in some of the main retail and service sectors:

[5] Due to open in Spring 2025 in the former TopShop flagship store
[6] Due to open in Spring 2025

Table 3.6: changes in selected high street retailers and service providers, 2010-2023

	2010 (Outlets)	2023 (Outlets)	Change (%)
Hair & beauty services	10,800	22,635	+110%
Take-aways	12,860	21,295	+66%
Clothes and shoe shops	13,215	9.605	-27%
Banks	7,150	2,715	-62%

Source: Public First and the Financial Times, 2024

3.36 Data published by the BBC and Green Street this year provides an up-to-date picture of changes in retail and service use composition in high streets across the country. This is shown in Table 3.7 below. Whilst the changes do not appear, at first glance, to be significant, it should be noted that this data is for the first six months of 2024 and comprises the net change in units (i.e. taking into account both closures and openings during this six month period). This indicates that the trends which have been evident over the past several years are continuing.

Table 3.7: fastest growing and declining retail and service providers, January to June 2024

	Net Change in Units, January to June 2024
Convenience stores	+85
Cafes and coffee shops	+92
Value retailers	+39
Estate agents	-122
Banks	-247
Pubs	-432
Pharmacies	-481

Source: Green Street, 2024

3.37 One of these trends is in relation to the continued growth in the number of convenience stores. Whilst this part of the grocery sector has faced some of its own challenges, the general trend over the past 15 years has been significant growth, particularly with a number of national multiple retailers (such as Co-op, Tesco and Sainsburys) turning away from opening larger stores and concentrating on smaller town and city centre stores, along with neighbourhood stores. In Summer 2024, Waitrose announced that it planned to open around 100 new convenience stores in the next five years, as it returns to store openings.

3.38 However, the headline trend in the grocery sector over the past five years has been the continued rise of discount stores such as ALDI and Lidl. These operators are now a well-established part of the UK grocery sector and, in combination, controlled around 18% of the UK grocery market in 2023. Indeed, ALDI overtook Morrisons in 2022 to become the UK's fourth-largest grocer by market share.

Figure 3.1: individual retailer market shares, 2023 (Source: Financial Times)

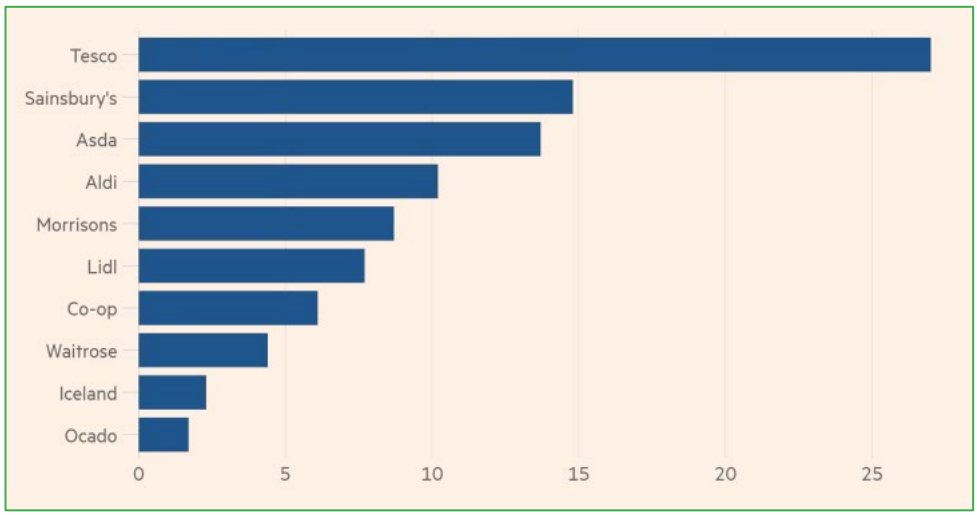


Figure 3.2: annual change (%) in market share by grocery sales, 2014-2024 (Source: Financial Times)



3.39 Looking forward, both ALDI and Lidl have significant continuing expansion plans, with ALDI's longer term goal of 1,500 stores in the UK (following the opening of its 1,000th store in the UK in 2024) and previously stating a target of Lidl 1,100 stores by the end of 2025 (Lidl currently has around 960 stores in the UK).

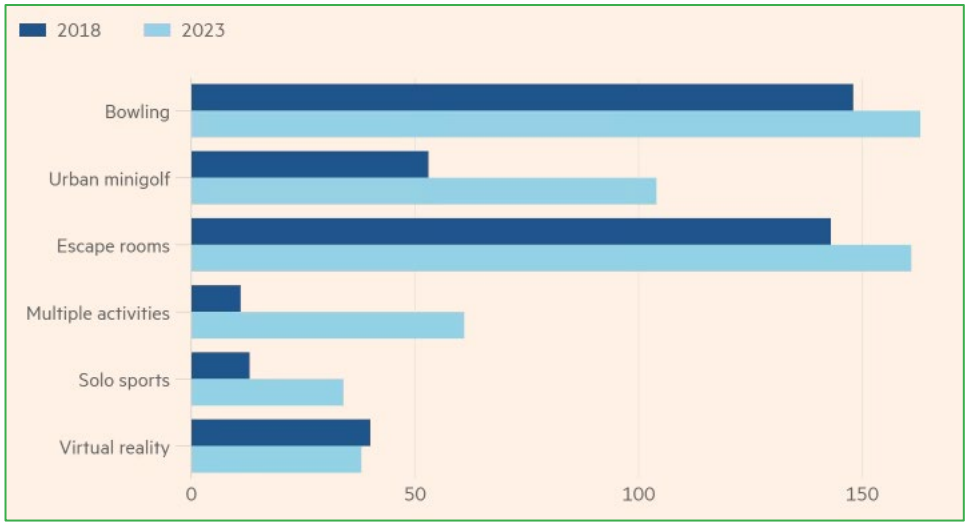
3.40 Turning to the leisure sector, the available market data shows a complex picture. The COVID-19 pandemic had a huge effect on the performance of this sector, which led to significant business closures and loss of employment opportunities.

3.41 The sector has bounced back and, according to research published by Deloitte, confidence reached a two year high in the first quarter of 2024. Since that time, however, recent research published by Deloitte has found that sentiment in 'eating out' and 'drinking in pubs and bars' has declined by about 6 percentage points since the start of 2024. This has been driven by the cost of living and increasing prices in the leisure sector particularly in the food and beverage sector. In recent years, costs for leisure and hospitality businesses have increased significantly, driven by higher energy and food costs, along with rising wages.

3.42 Data shown earlier in this section indicates that the impact of cafes and coffee shops on the occupation of premises on the high street, which is part of a longer term trend in most city, town and district centres towards more of a service-based offer. Cafes have also been a big part of the evolution of out of town retail and leisure parks, which have traditionally focused upon comparison goods retailing and 'big box' leisure facilities. With car parking areas under-utilised, and landlords looking for additional sources of income, proposals for stand-alone cafes (sometimes with drive-through elements) are now a common feature at out of town facilities; a trend which is also occurring as part of the expansion of discount foodstore operator sites.

3.43 Within the leisure sector, the post-pandemic period has seen some changes within key categories and their demand for space in town centres and out of town locations. In particular, there has been a shift in the types of venue being visited. In October 2024, Hollywood Bowl, the UK's largest ten-pin bowling operator indicated that like-for-like sales were a product of intensifying competition from new emerging leisure sectors, from axe-throwing to mini golf. Whilst 'active family' venues, such as ten-pin bowling, remain popular, there has been a growth in other activity-focused venues such as darts, cricket, axe-throwing and shuffleboard. According to the real estate adviser Savills the number of UK activity-focused venues has increased by around 40% since 2018 to 600 in 2024. Savills expect that the number of sites will increase further to 800 by 2029. The increase in the types of venue, by activity between 2018 and 2023, is shown in Figure 3.3 below.

Figure 3.3: UK socialising venues, number by segment, between 2018 and 2023 (Source: Savills)



Local Trends

3.44 Alongside national trends, it is also important to examine how local circumstances, in terms of town centres and retail land use provision, have evolved over the past decade. For the purposes of this Topic Paper we consider it useful to examine trends since the adoption of the Core Strategy and PSP Plan documents have focused upon two main areas:

a. Land use trends within each of the main defined 'town centres' in South Gloucestershire; and

b. Retail floorspace and other major commitments in existing and planned new 'town centres' in South Gloucestershire.

'Town Centre' Land Uses

3.45 Given the content of the proposed strategy for retail land uses and town centres in the new Local Plan, it is important to understand how the land use profile of existing 'town centres' in South Gloucestershire has evolved over the past decade. This will include trends in retail, service and leisure uses, and the number of vacancies in each location. This is considered to be a useful exercise in order to:

a. Show the trends in land uses in each of the main 'town centres' since the adoption of the Core Strategy and the PSP Plan documents;

b. Support the proposed approach to providing for retail uses, as part of the wider town centres strategy, in the new Local Plan.

3.46 In order to conduct this exercise our assessment has utilised land use data which has been collected by SGC over the past decade and which has been supplemented by additional surveys undertaken by Nexus in October and November 2024. Up until the end of the last decade, SGC collected land use data for each of those centres defined as Town Centres in the Core Strategy centre hierarchy on an annual basis, along with a survey of the large out of centre retail provision such as Cribbs Causeway and Longwell Green. In order to provide a time-series analysis to meet the purposes outlined above, we have adopted the 2013 and 2017 land use data (where available) for each main town centre and also updated the latest SGC survey (conducted in 2019) to provide an up-to-date 2024 set of data.

3.47 The data which has been collected by SGC (and updated by Nexus in Autumn 2024) is based upon all land uses within the defined 'town centre' boundary in each centre and, for the purposes of our analysis, this has been categorised in two ways. First, in terms of the historic pre-2020 land use classes[7] for 2013 and 2017, along with a hypothetical picture for 2024. Second, land uses have been expressed in relation to the current use classes order, post-2020, which now includes Class E and the re-categorisation of the former Class A uses.

3.48 Whilst the categorisation of sites using the post-2020 use classes is the most appropriate for the purposes of the new Local Plan, the inclusion of the pre-2020 classification is nevertheless interesting in order to show trends in some of the sub-categories (such as retail and food/beverage uses).

3.49 The data for each centre is contained at Appendix A to this report and provides a separate sheet for each centre, including both types of classification.

a. Table 1 – Bradley Stoke

b. Table 2 - Filton

c. Table 3 – Stoke Gifford

d. Table 4 - Patchway

e. Table 5 - Kingswood

f. Table 6 – Staple Hill

g. Table 7 – Hanham

[7] Including the now-abandoned A1, A2, A3 classes

h. Table 8 - Downend

i. Table 9 – Emersons Green

j. Table 10 - Yate

k. Table 11 – Chipping Sodbury

l. Table 12 - Thornbury

3.50 For most centres data is provided for 2013, 2017 and 2024, apart from a small number of centres who have recently been re-classified as defined 'town centres' (who are limited to 2017 and 2024 data). For the post-2020 land use classification, data for classes E, B2, B8, C1, C2, C3 and F1 is provided, along with *sui generis* uses and vacancies. Data for each use class is given in terms of unit numbers and is in proportionate terms, in order to show trends for each interpretation over time.

3.51 The data and trends for each centre can be summarised as follows.

Bradley Stoke

3.52 Table 1 at Appendix A provides a summary of the land use data for Bradley Stoke, which is concentrated upon The Willow Brook Centre. The data shows that, based upon the current use classes order, there has been a small increase in the number of Class E uses in the centre since 2013, although there has been very little change elsewhere in the centre.

3.53 The main recent changes in the centre in recent years have been the development of two new food and beverage units (McDonalds & Starbucks), which were granted at appeal. For the avoidance of doubt, these two new units have been classified as Class E[8] uses although both have an element of take-away (sui generis) use. At the time of our survey in November 2024, there were no vacant units in the centre, although it should also be noted that there is an extant commitment for new retail floorpace within the centre (which relates to an existing development plan allocation and a planning permission for a new retail unit).

Filton

3.54 The defined area of Filton town centre encompasses two distinct parts: the Shield Centre, which is a modern retail park style development, along with a more traditional suburban concentration of shops, services and other commercial uses along the A38 Gloucester Road. Table 2 at Appendix A indicates that Class E units account for around four-fifths of all units in the centre (82%) and these uses have increased by one since 2013. Vacances have fallen from 3 to 2 units since 2013 and now occupy around 5% of all surveyed units.

3.55 Looking at the sub-Class E categories, Table 2 indicates that there has been a fall in the number of retail (Class E(a) / former A1) uses, alongside small increases in the number of service and café/restaurant uses. Class E(a) retail uses still, however, occupy around half of all surveyed units in the centre.

Stoke Gifford

3.56 Stoke Gifford is a relatively new defined centre in the development plan hierarchy, originally classified as a district centre in the PSP Plan and proposed to be changed to a Town Centre in the new Local Plan. The defined primary

[8] Formerly Class A3 uses

shopping area boundary includes the large Sainsburys supermarket, along with a collection of uses in the former B&Q unit (Lidl, The Range, and Everlast Gym). There is also a large amount of vacant floorspace within the former B&Q unit.

3.57 The wider town centre boundary encompasses the recently developed ALDI, Costa and Premier Inn units on land to the west of Fox Den Road, along with the Holiday Inn Express hotel, Fox Den pub/restaurant, a Travelodge hotel and land subject to a planning permission for student accommodation to the south of the former B&Q unit.

3.58 Given its history, this centre has the character and appearance of an out of centre retail park and this leads to the land use profile of the centre being dominated Class E(a), E(b) and Class C1 uses. Whilst this defined centre clearly serves an important retail function, it does not meet the same wide range of needs as a number of the other Town Centres in South Gloucestershire. This perceived shortfall in function will be narrowed by the implementation of the student accommodation scheme to the south of the former B&Q unit and the remainder of the mixed used development to the west of Fox Den Road.

Patchway

3.59 Patchway is a one of recent additions to the town centre tier in the formal centre hierarchy in South Gloucestershire. The current boundary of the centre encompasses two distinct parts: the older part of the centre around Rodway Road, and more recent additions on the southern side of Highwood Road (within the Charlton Hayes development). Because of its more recent addition to the formal centre hierarchy, historic data (from SGC) for the centre is only available for 2019. This 2019 data has been updated by Nexus in November 2024 and is summarised in Table 4 at Appendix A. The data shows that, of the 21 units within the centre, there has been a noticeable increase in the number of Class E uses, from 8 to 12. Class E uses currently occupy around 57% of all surveyed units in the centre. There has also been a reduction in the number of vacancies, from 2 in 2019 to zero in 2024.

Kingswood

3.60 Table 5 indicates that there has been a drop in the number of Class E units in Kingswood over the period 2013-2024, particularly during the period 2017-2024. At the time of the most recent survey 104 of the 141 surveyed units in the centre are within Class E, falling from 120 units in 2017. The fall in Class E units should be set alongside a rise in *sui generis* uses, which have risen from 5% of all units surveyed in 2013 to 12.8% in 2024.

3.61 There has been a fall in the number of vacant commercial properties in Kingswood town centre over the period from 2013 to 2024, particularly during the period 2013-2017. In 2013 there were 21 vacant units in the centre (13% of all surveyed units), falling to 14 in 2024 (9.4% of all surveyed units).

3.62 If some of these trends are expressed in the sub-Class E categories, it is noticeable that the overall fall in Class E uses is mainly driven by a fall in retail Class E(a) uses and service Class E(b) uses. Food and drink uses, such as café and restaurant uses, have remained relatively static, although there has been a rise in hot food take-away uses (formerly A5 uses) (which has driven the rise in sui generis uses within the post-2020 land use classification.

Staple Hill

3.63 Table 6 at Appendix A provides a summary of the land use data for Staple Hill between 2013, 2017 and the Nexus update in 2024. The table shows that, over this period, there has been a small rise in the number of surveyed units, from 142 in 2013 to 148 in 2024. Class E uses currently occupy around two-thirds (68%) of all surveyed units in the centre, although it should be noted that this proportion has fallen from 77% in 2013. The data in Table 6 shows that this fall in Class E uses has been counteracted by notable rise in sui generis uses, and reference to the pre-2020 land use

classifications shows that this is due to an increase in the number of former A5 (hot food take-away) and D1 uses. There has also been a noticeable fall in the number of former Class A2 service uses.

3.64 Table 6 also shows that the number of vacancies in Staple Hill has fallen from 6 units in 2013 / 2017 to 5 units in 2024. This is equivalent to just 3% of all surveyed units in the centre.

Hanham

3.65 Over the past decade, the available data from SGC, supplemented by the Nexus survey in Autumn 2024, shows that there has been little change in the land use composition of Hanham town centre (see Table 7 at Appendix A). The number of Class E uses has fallen slightly from 60 in 2013, to 57 in 2017 and 56 in 2024. Class E uses comprise around two-thirds of all survey uses in the centre. This overall decline in Class E uses has been heavily influenced by a halving in the number former A2 service uses from 22% in 2013 to 11% in 2024.

3.66 Vacancies within Hanham town centre have remained relatively stable between 2013 and 2024, at 5.7% of all units in 2013 and 4.7% in 2024. This is considered to be a low level of vacancy and a sign that there is good levels of demand for commercial property in Hanham and the size of its town centre.

Downend

3.67 Table 8 at Appendix A indicates that there have been only modest / small-scale changes the land use composition of Downend. There has been a fall of 3 units in the Class E category between 2013 and 2024, alongside a change of just one unit in the *sui generis* and vacant unit categories. Class E uses are a very dominant use in this centre, accounting for around 85% of all surveyed units. At the present time, vacancies account for 5.5% of all surveyed properties, which is a rise from 3.4% in 2013. However, this level of vacancy is considered to be low and a sign of a location which remains attractive to main town centre land use occupiers.

3.68 Within the Class E land use sector itself, these changes over 2013-2024 have been influenced in a number of ways. Table 8 shows that former A1 uses (now Class E(a)) A2 uses (now Class E(c)) have (collectively) fallen by six units. In contrast, there was been a noticeable increase in Class E(b) café/restaurant uses (but not matched by any noticeable change in A5 / sui generis hot food take-away uses.

Emersons Green

3.69 Emersons Green is one of a small number of 'modern' defined town centres in South Gloucestershire, which is presented, in part, is a 'retail park' style, anchored by a large Sainsburys supermarket. Table 9 at Appendix A indicates that the main changes in the land use composition of the centre between 2013 and 2024 relate to a rise on Class E(a) retails (formerly Class A1) and a fall in Class E(c) uses (formerly Class A2). Class E uses account for over 90% of all surveyed units in the centre (equivalent to 24 out of the total of 26 units). There is currently only one vacant unit with the centre.

Yate

3.70 Tables 10a and 10b at Appendix A provide a summary of land use data for Yate between 2013, 2017 and 2024. In order to provide sufficient information, Table 10a provides data which is concentrated upon Yate shopping centre, which comprises the core part of the town centre (including the reasonably new Riverside development on the eastern side of the centre), whilst Table 10b provides an expanded set of data to include land uses along the Station Road area (which currently forms part of the defined town centre boundary area in Yate).

3.71 Table 10a shows that, at the present time, around 83% of all surveyed units in the core Yate shopping centre area are occupied by Class E uses. This is an increase of around six percentage points since 2013 and is, in part, driven by the Riverside development which has provide a number of new large Class E units.

3.72 At the time of the 2013 SGC land use survey there were 20 vacant units in the main town centre area. This has, by 2024, fallen to 7 vacancies, which is equivalent to circa 6% of all surveyed units, which indicates the continued popularity of the town centre as a retail, leisure and commercial land use area.

3.73 Table 10b includes the Nexus 2024 survey of land uses along Station Road and the data in this table shows that, which the shopping centre and Station Road uses are combined, there is a noticeable shift away from Class E uses. In the main part of the town centre (i.e. the shopping centre area), 83% of units are currently in Class E use. When the Station Road data is included this drops to 54%. This shift is influenced by a large number of Class C3, F1 and sui generis uses. However, it should also be noted that the proportion of vacant property remains low (at 4% of all surveyed units across the combined area).

Chipping Sodbury

3.74 Over the past decade Chipping Sodbury has experience only modest changes in its land use composition within its town centre. The only increase in number of units falling within the survey area has been led by increases in residential, Class F1 and sui generis uses, whilst there has been a small fall in the number of Class E units (see Table 11). Vacancies within the centre have remained low, ranging from 3% in 2013 to 4% in 2024. The main change in the centre over the last decade has been the implementation of the Waitrose supermarket development on the northern edge of the centre. It is notable that there has not been a significant change in the land use composition of the centre since the opening of Waitrose, which could suggest that the supermarket has been able to reinforce and support existing land uses in a centre. One potential reason for this outcome may be due to the style of retail offer (and associated catchment) of the Waitrose and the previous lack of a main food shopping grocery store in the centre.

3.75 Within the pre-2020 land use classification categories, there have been small falls in the number of retail (A1), café/restaurant (A3) and service (A2) use categories and a rise in the number of (former) Class B1 office uses.

Thornbury

3.76 Table 12 at Appendix A indicates that Thornbury town centre has around 150 units which are included in the survey of its main land use classifications. The data provides some interesting trends, including:

a. A small fall in the number of Class E units in the centre, although almost three-quarters (72%) of units remain in Class E use in 2024.

b. A decrease in the number of vacancies in the town centre, from 18 in 2013 (12% of units) to 13 units in 2024 (9%).

c. Within the Class E category there have been modest gains in Class E(a), E(b) and E(g) uses, which should be set against a noticeable eight percentage point fall in the number of service (Class E(c) / A2) uses.

Commitments

3.77 In addition to changes in the land use profile of defined 'town centres' it is also useful to account for retail floorspace commitments and recent store openings as both of these categories will make a contribution to meeting the quantitative needs which were identified and planned for in the Core Strategy and PSP Plan documents. Whilst there

have been a number of changes in the composition of existing retail floorspace, which may have already been trading at the time of preparing the Core Strategy and PSP Plan documents, our review has focused upon new retail floorspace commitments / recent store openings, along with commitments[9] for new 'centres'.

3.78 The key commitments, for the purposes of this Topic Paper, are as follows:

a. Stoke Gifford town centre. Construction activities are now nearing completion for a mixed use development on one of the two sites allocated in the PSP Plan for development in the newly defined town centre at Stoke Gifford. This development includes a new ALDI store, a food/beverage unit and a hotel. Construction has yet to be commenced on the other element of this commitment which comprises a 1,500sq m (gross) mixed use building. Whilst other land uses where not specifically ruled out by the PSP Plan allocation, the main focus for this site at the time of allocation was for comparison goods floorspace.

b. Bradley Stoke town centre. Following the allocation of circa 3,100sq m of comparison goods floorspace to this defined centre in the PSP Plan, and a planning permission for a similar amount of floorspace granted around the same time, a subsequent planning permission has been granted to extend The Willow Brook Centre to provide a new circa 2,100sq m gross retail unit to be occupied by a foodstore[10]. This permission remains extant at the time of writing this Topic Paper, but has yet to be implemented.

c. Site 20, Cribbs Causeway. Following the development of part of a hybrid planning permission for new car showroom, leisure and food/beverage land use development on a large site to the south of Merlin Road, a new hybrid planning permission was granted earlier in 2024 for mixed use development including an ALDI foodstore (which is now open). This replaces the unimplemented element of the original hybrid permission which included a large unrestricted comparison goods retail unit[11].

d. Brabazon, Former Filton Airfield (YTL). The new centre within this large residential-led mixed use development is not identified in the current development plan as a new 'town centre' (and was not allocated any of the quantitative need in the PSP Plan). However, it is proposed to be included in the formal centre hierarchy in the new Local Plan as a Local Centre. Two outline planning applications have now been submitted for the Brabazon development, the latest of which includes a new centre including up to 25,000sq m of Class E(a/b/c/d) and health/fitness uses. The original outline planning permission included a cap on the size of the supermarket to be provided as part of the new centre, although this has not been carried forward into the latest permission. However, the latest proposal does set a limit of 5,000sq m gross for comparison goods floorspace with the planned new centre.

e. Cribbs Triangle. After a period of delay, the foodstore element of the Cribbs Triangle development is now being implemented and will soon be occupied by Lidl. This store was not included as a retail allocation in the current development plan.

f. Longwell Green. Following the introduction of the new use classes order regime in 2020, the Kingswood Industrial Estate, which lies adjacent to the Gallagher Retail Park, has gained a lawful Class E status. This status was a material factor in a recent planning application (which has now received permission) for the redevelopment of the industrial estate, which includes a mixture of retail, industrial, food/beverage and other commercial uses.

[9] For the purposes of this exercise, we have based commitments upon planning permissions for new centres rather than development plan commitments.
[10] Likely to comprise mainly convenience goods sales.
[11] A commitment which gained planning permission after the adoption of the PSP Plan.

3.79 Further details of these commitments are contained at Appendix B to this document.

3.80 The key messages to take away from this analysis of commitments are that, in addition to the commitments which were flagged in Policy PSP31 of the PSP Plan for some of six town centres, additional / alternative development has now come forward. This include alternative land uses for Bradley Stoke and Stoke Gifford, along with a considerable amount of new floorspace to be provided in an additional new centre (Filton Airfield) which is now to form part of the formal centre hierarchy. There are also some notable out of centre retail and leisure floorspace commitments which were not included in the quantitative need site allocations for the PSP Plan.

3.81 This suggests that, in a number of instances, the PSP Plan correctly identified those 'town centre' locations where additional investment was, in principle, required and warranted (as evidenced by the subsequent planning permissions). However, it also demonstrates that market requirements have diverged from the scale of quantitative need for comparison goods floorspace forecasts in the development which will have, no doubt, been influenced by the other trends highlighted in this Topic Paper.

3.82 In addition, it also shows that some requirements for new, replacement or redeveloped retail and leisure land use floorspace will be met outside of the development plan allocations and defined 'town centres' on unallocated out of centre locations. Whilst in the case of South Gloucestershire this has occurred in relation to mainly convenience goods floorspace rather than the comparison goods floorspace needs identified in the development plan, it nevertheless demonstrates that principle that 'windfall' sites will also have an impact upon meeting 'needs' (whether they be quantitative / qualitative needs or business / market requirements).

3.83 Therefore, this recent historic suggests that development plan allocations cannot be relied upon to deliver all of the forecast quantitative need at a point in time. Indeed, this experience suggests that flexibility is required to deal with changes in circumstances, changing market and economic conditions, and 'windfall' sites/commitments that soak up some identified needs.

4. Towards a Town Centres and Retail Strategy for South Gloucestershire

Introduction

4.1 A key purpose of this Topic Paper is to inform and support the content of the new Local Plan for South Gloucestershire in relation to town centre and retail planning policy issues, including how to plan positively for retail and main town centre uses and the overall strategy for defined town centres. As part of this exercise, consideration is given to whether existing strategies, allocations and development management policies in the existing development plan should be taken forward in either their existing or modified form (or deleted).

4.2 Section 11 of the December 2023 Reg.18 consultation document outlines SGC's intended approach in relation to existing development plan policies in the Core Strategy and PSP Plan. This is supported by Appendix 1 of the same document which outlines the range of policies (strategic and non-strategic) that will be contained in the full set of policies in the forthcoming Reg.19 consultation, whilst Appendix 3 of the Reg.18 document also provides an indication of how other existing policies will be dealt with (i.e. saved or deleted). In relation to retail and town centre issues, it is proposed that:

a. Policy CS14 of the Core Strategy and Policy PSP31 of the PSP Plan will be replaced by a new 'Town Centres' policy;

b. Policies PSP32 (local centres), PSP34 (public houses) and PSP35 (food and drink uses) will be saved (i.e. carried forward in an unaltered form); and

c. Policy PSP 33 (retail frontages) will be deleted (and not replaced).

4.3 In addition, retail and town centre issues also feature as a component part of site and / or area-specific policies in both the adopted development plan and the draft new Local Plan and it is intended that a number of these policies will also be subject to a number of changes in order to coincide with the development strategy in the new Local Plan. Such policies may, for example, address the allocation of new 'town centres' to serve planned new communities across the district.

4.4 In relation to existing policies, CS14 and PSP31 are both wide-ranging. It is the intention that their focus and reach in the replacement policy (in the new Local Plan) will be the same. In broad terms, based upon the content of the Reg.18 consultation, the replacement policy will:

a. Set out the 'town centre' hierarchy

b. Provide development management policy considerations for proposals located in defined town centre and primary shopping areas

c. Provide development management considerations for proposals for main town centre uses located outside of town centres (i.e. the sequential and impact tests)

d. Provide general assessment criteria for main town centre land use proposals.

4.5 This section addresses the content of the replacement policy including the retail hierarchy and how the new Local Plan addresses the need for retail floorspace. Sections 5 and 6 go on to address issues associated with the strategic planning

for new / revised / expanded 'town centres', followed by the content of policies PSP32-35 (and their potential place in the new Local Plan).

A Strategic 'Town Centres' Policy for the New Local Plan

Retail Hierarchy

4.6 Within the Core Strategy, Policy CS14 provided a town centres hierarchy which was based upon three tiers: town centres, district centre and local centres & parades. The new Local Plan proposes that the 'town centres' hierarchy is retained in a slimmed down form, with the removal of the district centres tier. In Policy CS14, the two district centres were Stoke Gifford and Patchway and it is proposed that these two centres will now become town centres, thus increasing the number of town centres from 10 to 12.

4.7 In relation to the proposed adjustment to the defined centre hierarchy in the new Local Plan, it should be noted, as a starting point, that the NPPF is not overly prescriptive regarding the tiers of centre which must be provided in a development plan. The Core Strategy provided a three-tier hierarchy in South Gloucestershire which was considered appropriate in 2013, although there is no reason why this cannot be re-examined for the new Local Plan based upon material changes in circumstances and the general development strategy for the new Plan.

4.8 The ten existing town centres have distinct characteristics, in terms of scale and function, which mark them apart from the other smaller shopping and service centres in South Gloucestershire. They have a distinct role in terms of convenience and comparison goods shopping, along with service and other commercial uses, within three noticeable types of centre: 'traditional' town centres such as Yate, Chipping Sodbury and Thornbury; suburban centres, such as Kingswood and Staple Hill; through to modern centres such as Emersons Green and Bradley Stoke.

4.9 Whilst Stoke Gifford and Patchway may be towards the smaller end of the range of other existing town centres, we do not consider that there is any particularly strong reason why they should not be part of this same category. In particular:

a. Stoke Gifford plays a significant role in the provision of convenience goods shopping in the North Fringe; a role which will be boosted by the opening of the new ALDI store. There is also a reasonably large comparison goods offer within the centre, which provides for some of the needs of the local population. This is also supported by a gym within the defined centre boundary. However, in terms of the future for Stoke Gifford, there is an opportunity to expand the range of non-retail main town centre uses, which could commence with the commitment for a new mixed-use block with the current Fox Den Road commitment.

b. Patchway has traditionally been a reasonably small centre, which has functioned alongside two other centres in the post-war Patchway neighbourhood[12]. However, the development of the large Charlton Hayes neighbourhood has, in recent years, offered the opportunity to expand the centre at Highwood Road through additional land to provide more facilities and also through a greater level of local spending capacity. The development of new facilities to the south of Highwood Road (which was part of a former development plan allocation) warrants the elevation of Patchway in the centre hierarchy. This centre will also, no doubt, benefit in the short term from the new residential development at Brabazon prior to new facilities coming forward in that development.

[12] Coniston Road and The Parade Local Centres

4.10 In relation to local centres, the proposed formal centre hierarchy in the new Local Plan includes the following newly designated local centres:

a. Former Filton Airfield (Brabazon). Planning permission has now been granted for this new centre, the details of which are provided in Section 3 of this document.

b. East of Harry Stoke. Planning permission for this new centre, which is intended to include a 1,000sq m gross foodstore, has been granted.

c. Lyde Green. A new collection of shops, services and community facilities on Willowherb Road.

d. Ladden Garden Village. Implementation of Ladden Garden Village is now well-advanced and a new Sainsburys convenience store has been provided as part of the planned local centre.

4.11 Given their various stages of commitment / implementation, we consider it correct for the new town centres policy in the new Local Plan to identify Brabazon, East of Harry Stoke, Lyde Green and Ladden Garden Village as 'new' centres in the formal centre hierarchy. Indeed, any impact assessments which may be required for edge/out of centre proposals across Yate and the North Fringe will need treat the above three centres as planned / committed investment for the purposes of the impact policy test, due to their varying stages of implementation.

4.12 In addition to these three centres, we recommend that the town centres policy in the new Local Plan also includes reference to the other planned new local centres which will form part of some of the strategic land allocations elsewhere in the plan. Whilst these centres do not yet exist (or have planning permission), they will in due course provide important local facilities for the residential communities that they will lie within and should, therefore, be offered protected by planning policy. In particular, they should be treated as, at the very least, planned investment (and also acquiring committed investment, as the project moves through the planning and development proposal process). In our opinion, without the status of 'new local centres' in the Local Plan's town centre's policy, there may be some ambiguity when preparing sequential and impact assessments for retail and leisure proposals which sit outside of Local Plan development strategy. The inclusion of these new planned local centres in the policy would help to avoid this situation.

4.13 Further analysis of these planned new local centres is contained later in this section, although the new centres which we recommend to be included in the town centres policy are:

a. New Woodlands

b. Carsons Green and Rockhouse Farm New Neighbourhoods

c. North Lyde 'ecotech' Village

4.14 In addition to the above planned new local centres, our analysis, contained later in this section, recommends that Charfield, Wick and Alveston are included as a local centre in the hierarchy. This is based upon the existing role of Charfield, Wick and Alveston in the settlement hierarchy (and the facilities contained therein), along with the planned residential development around these village. Cheswick Village is also proposed to be identified as a local centre on the basis of the scale of residential development in this area over recent years and the provision of new retail and service land uses to serve the growing residential community. For completeness, it is also useful to note that Tibberton and Baugh Gardens in Downend are proposed to be removed from the hierarchy due to loss of a number of main town centre uses in these locations to residential land use.

Planning for Retail Land Uses

4.15 Traditionally, the assessment of the 'need' for net additional retail floorspace, and the subsequent allocation of land / premises to meet the identified need, has been a key feature of development plan documents. Current national planning policy around this topic has been covered in Section 2 of this Topic Paper, as has the approach of the current development plan. The current SGC development plan is structured into two sequential parts: first, an assessment of global district-wide need was prepared for (and contained within) the Core Strategy; which was then followed by an allocation / distribution of this need to specific locations in the PSP Plan (based upon a set of characteristics which exampled qualitative and site / location-specific factors).

4.16 The allocation of the identified need (as set out in Policy CS14) was performed by Section 3 of Policy PSP31, which outlined a series of retail floorspace allocations for five town centres and one district centre. These 'allocations' are limited to comparison goods retail floorspace provision, but sought to provide for all of the identified quantitative need over the first five years of the PSP Plan.

4.17 No specific allocations were made in PSP31 for convenience goods floorspace, although the provision of this type of floorspace was encouraged via the identification of planned new local centres. Leaving aside scale and location issues, both of these types of retail floorspace are also conditionally supported by the development plan through policies in the development plan which deal with 'town centre' development proposals.

4.18 Within the new Local Plan, Paragraph 3c.20 of the December 2023 Reg.18 consultation document indicates that there is sufficient space within South Gloucestershire's town centres to meet future needs and those of the communities that they serve. The Reg.18 bases this approach on a number of factors, including: the changing nature of town centre environments, changes in the classification of land uses (and the extent of permitted development rights); changing shopping habits, the amount of floorspace within 'town centres'; and that some development plan allocations for more retail floorspace have not been delivered. The proposed approach in the Reg.18 consultation is, therefore, not to carry forward the comparison goods floorspace allocations in Section 3 of PSP31.

4.19 In order to support this proposed approach, this Topic Paper provides additional evidence and justification. A useful starting point is in relation to the 'allocations' in Policy PSP31 of the PSP Plan. These are shown below.

Bradley Stoke

4.20 For Bradley Stoke, a specific area of land, at the northern end of the retail terrace was identified for the provision of circa 4,000sq m of new retail floorspace. Subsequent to the adoption of the PSP Plan, an outline planning permission was granted (at appeal) for the provision of 3,100sq m of additional retail floorspace in this location. The description of development referred to non-food retail units although the appeal decision notice did not seek to restrict the type of retail sales from the permitted floorspace. This 2020 planning permission has not been implemented and has been followed by another permission, granted in 2023, for an extension to provide a new unit for a foodstore. This additional floorspace is also not restricted in terms of the type of retail goods which can be sold. At the time of writing this report, this latter permission remains extant. As a consequence, this allocated land remains available to accommodate the existing PSP allocation, albeit the latest permission seeks a different type of retail use to that intended in the PSP Plan.

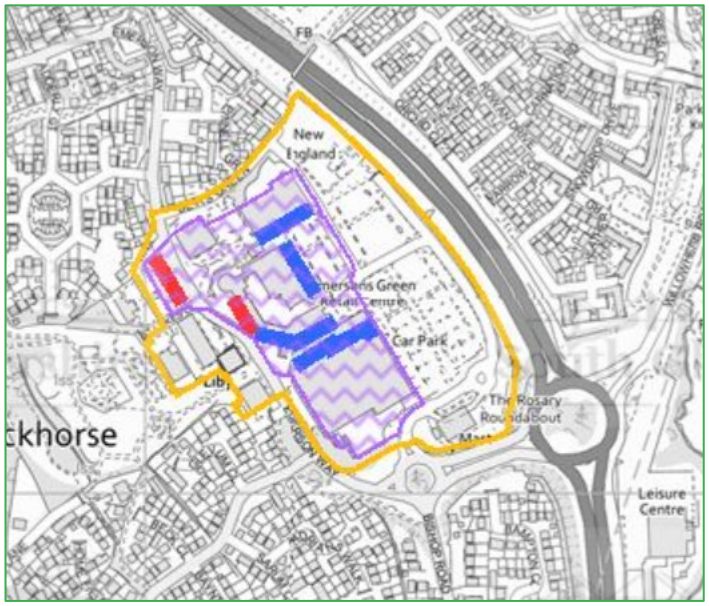
Figure 4.1: extract from PSP Plan policies map for Bradley Stoke town centre (showing location of allocated retail site – pink shading)



Emersons Green

4.21 At Emersons Green town centre (shown in Figure 4.2 below) the PSP Plan did not allocate a specific area of land and simply assigned circa 1,400sq m to intensification of floorspace to the centre. This allocation has not, to our knowledge, been taken up via planning permission.

Figure 4.2: extract from PSP Plan policies map for Emersons Green town centre



Filton

4.22 Similarly, the PSP Plan does not allocate a specific area within Filton town centre for the 1,400sq m allocation of retail floorspace. However, by the time of adopting the PSP Plan this floorspace had been taken up by a commitment (planning permission, implemented in 2015).

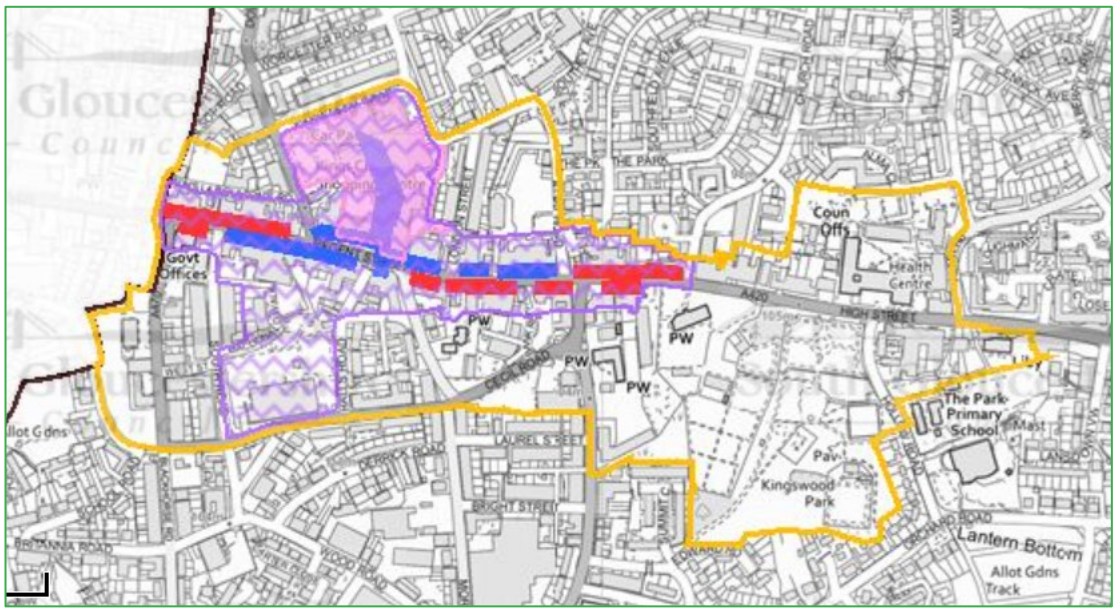
Figure 4.3: extract from PSP Plan policies map for Filton town centre



Kingswood

4.23 The PSP Plan provides a location-specific allocation of land (at Downend Road and Kings Chase) for its 3,000sq m allocation for Kingswood. This is shown in Figure 4.4 below. This allocation has not been taken up by any planning permissions.

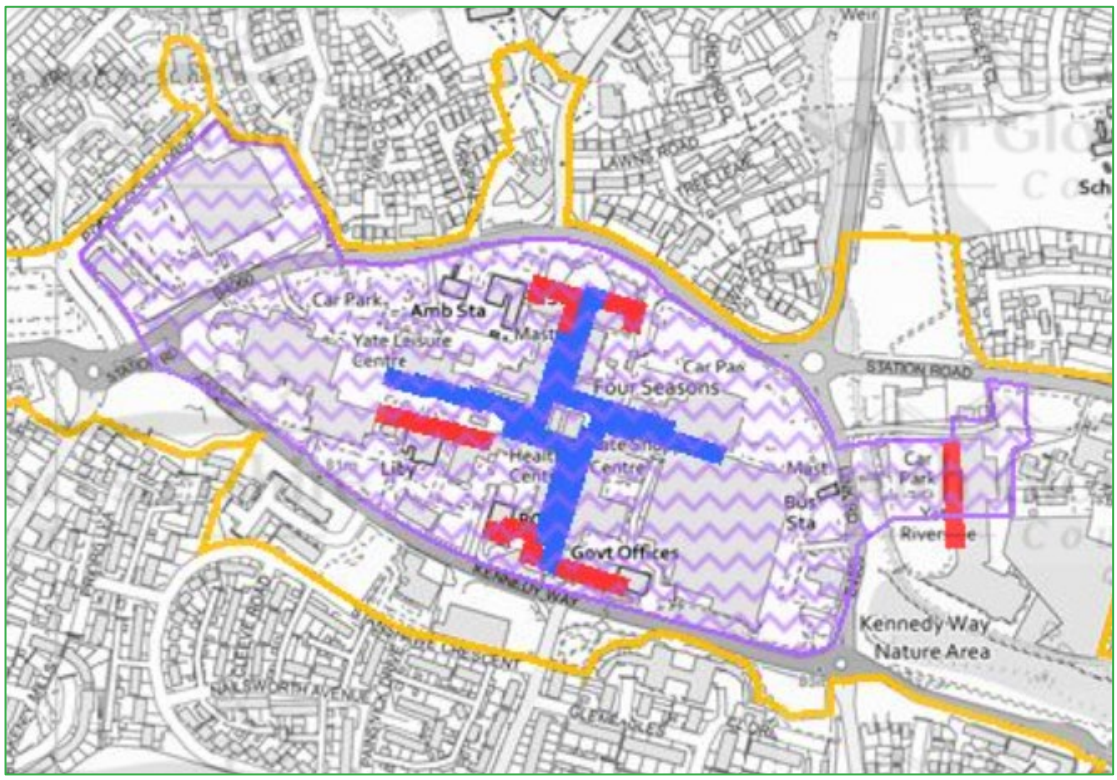
Figure 4.4: extract from PSP Plan policies map for Kingswood town centre



Yate

4.24 Figure 4.5 below shows the extent of Yate town centre and its primary shopping area, as defined by the PSP Plan policies map. The PSP Plan allocated 1,600sq m of retail floorspace to the town centre. No specific land / area allocation was highlighted, although the PSP Plan indicates that the floorspace allocation has been taken up by the planning permission for Riverside Retail & Leisure Park located to the east of Link Road.

Figure 4.5: extract from PSP Plan policies map for Yate town centre



Stoke Gifford

4.25 The final defined centre to be allocated retail floorspace in the PSP Plan was Stoke Gifford district centre. The allocation extended to 5,000sq m and was split across two areas: land to the north of the Sainsburys store at Fox Den Road and land to the east of Abbey Wood Shopping Park / to the north of the MoD offices. In relation to these two areas:

a. Land to the east of Abbey Wood Shopping Park. Whilst the eastern part of this allocation has not experienced any planning activity over recent years, the western element was granted planning permission for a hotel and food/beverage outlet. This has now been constructed and accommodates a Travelodge and a Greggs.

b. Fox Den Road. Planning permission has been granted for a mixed use scheme on this element of the allocation. The majority of the permission has now been implemented and provides an ALDI foodstore, a hotel and restaurant, along with a Costa food/beverage unit. The final element, a multi-use building, which can be used for a mixture of retail, food/beverage, service, office, leisure and take-away uses, has not yet been constructed.

4.26 Therefore, the planning permissions which have been granted across the two parts of the Stoke Gifford floorspace allocation have, in part, been for non-retail uses.

Figure 4.6: extract from PSP Plan policies map for Stoke Gifford district centre



4.27 The above analysis indicates that not all the 16,000sq m of comparison goods retail floorspace allocated in the PSP Plan has been provided in the six specific locations identified in PSP31. In particular, three outcomes have occurred: some allocations have been achieved (i.e. Filton and Yate); some site-specific locations have received permission (in part, or as a whole) for alternative land uses (Bradley Stoke and Stoke Gifford); and, thirdly, some allocations remain undelivered (Kingswood and Emersons Green). This could, on face value, suggest that the objectives of the Core Strategy and the PSP Plan have not all been achieved. However, before we go on to consider the reasons why this eventuality has occurred, it should be noted that additional comparison goods retail floorspace is being provided for (outside of the six centres outlined above) in other locations.

4.28 The main area of note is at the former Filton Airfield. Over the past decade two outline planning applications have been supported by SGC on the former airfield site for large-scale residential-led mixed development. The first application has received planning permission, whilst the second has secured a resolution to grant permission. Both proposals include a large amount of retail floorspace, the majority of which is concentrated around a new centre (to be located in the eastern half of the former airfield), close to the site of the new YTL Arena complex. Within the latest outline planning application, allowance is made for 5,000sq m gross / 3,250sq m net of comparison goods floorspace (plus 4,500sq m convenience retail and 13,000sq m food/beverage).

4.29 Therefore, the reality of the situation over the past 7-10 years across South Gloucestershire is that whilst SGC sought to identify[13] land / locations in six specific locations for all of the forecast quantitative need for net additional comparison goods floorspace between 2016 and 2021, other locations have also been capable of need this quantitative need. The same situation has also occurred for convenience goods shopping, even though the PSP Plan and Core Strategy did not specifically identify a quantum of need which should be met.

4.30 Therefore, any perceived short-fall in meeting the PSP31 quantitative need comparison goods allocations may not be as large as it first seems, which is also reinforced by other wider factors surrounding existing space in 'town centres' and general market / retailing trends over the past 7-10 years. In relation to these wider factors:

[13] In Policy PSP31

a. Market factors for the six allocations / locations. Whilst it may never have been the intention of the PSP Plan to limit the sites / locations in Section 3 of PSP31 to just net additional comparison goods retail floorspace, market factors have led to different outcomes in some instances. This is true for the allocations at Stoke Gifford and Bradley Stoke, where a combination of hotel, food/beverage and convenience goods retail floorspace provision has been permitted and, in part, provided. In these circumstances, market forces have provided alternative land uses which also contribute to the health of, and investment within, defined 'town centres' and have taken precedence over previous quantitative need forecasts.

b. Provision beyond the Policy PSP31 allocations and defined 'town centres'. Whilst Policy PSP31 sought to identify specific opportunities to provide for the quantitative need forecasts set out in the Core Strategy and PSP Plan, the experience of the past 7-10 years shows that quantitative aspects of provision are being met in other locations. This is through other locations identified in other parts of the development plan (i.e. the former Filton Airfield, which is due to become another defined centre in the formal centre hierarchy) and also locations outside of defined centres (such as Cribbs Causeway).

c. Trends / expenditure. As noted in Section 3, there have been significant shifts in the trends surrounding the retail sector since the preparation and adoption of the Core Strategy and PSP Plan. There have also been significant changes in the level of per capita retail expenditure growth over the past decade, which will have also influenced the need to plan for new retail floorspace. In particular:

    1. Trends. Recent history has shown that the retail sector and, as a consequence, town centres have been subject to changes in market conditions which have affected the demand for retail floorspace. Whilst it is clear that demand remains, for both convenience and comparison goods retail floorspace, the corporate failure of some national multiple retailers has led to existing floorspace becoming available for re-occupation by those retailers who continue to require additional space. This has led to a 'churn' in retail floorspace which removes, in part, the need to construct net new floorspace. Recent experience suggests that this phenomenon is likely to continue and this will influence the retailing and town centres strategy in South Gloucestershire.
    2. Recent expenditure trends. The analysis contained within Section 3 indicates that the level of per capita expenditure growth envisaged at the time of preparing the Core Strategy was well above the actual growth in per capita spending over the past decade. This experience may well have influenced ability to fully meet the development quantitative need projections / capacity allocations.
    3. Future retail sales and floorspace efficiency forecasts. Our analysis, supported by up to date research data, has also shown that any future growth in retail sales may well be matched by increases in floorspace efficiency and, in any event, curtailed by the on-going rise in internet spending. As a consequence, not only have past trends influenced the demand for net additional retail floorspace development, but future trends are likely to do the same.

d. Town centre land use profiles. As set out in Section 3 of this Topic Paper, there has been a shift in the land use profile of the main defined 'town centres' in South Gloucestershire. This shift has not necessarily resulted in large amounts of vacant floorspace (which is a sign of the good health of South Gloucestershire's main centres), but is showing that, in some centres, the demand for retail floorspace is reducing. This is coupled with the more flexible approach to use classes, which makes it easier for town centres to response to on-going changes in demand levels.

e. Planning for new 'town centres'. As noted above, the existing development plan (particularly the Core Strategy and the PSP Plan) planned for new retail provision beyond the six locations identified by Section 3 of Policy PSP31. In particular, planned new 'town centres' have the ability to accommodate part of the

identified quantitative need and also meeting qualitative needs as well. A prime example of this is the former Filton Airfield, although other new centres are planned for in both the existing development plan and the new Local Plan.

Conclusions

4.31 Overall, therefore, it is reasonable for the new Local Plan policy (which is intended to replace CS14 and PSP31) to move away from a quantitative need-led approach to planning for retail land uses and to be based, instead, on a basket of indicators (as outlined above). This should be based upon the following key pillars which provides a positive approach to the district's 'town centres' and whilst continuing to acknowledge that the new Local Plan intends to plan for meeting retail 'needs' alongside other main town centre land uses:

a. New / replacement floorspace will naturally be encouraged by the Council's positive planning strategy for existing 'town centres'. Even without specific site / area allocations, the new Local Plan is able to provide a positive policy environment to support new retail land uses within defined 'town centres' (meaning both town centres and local centres in the formal centre hierarchy). In addition to the opportunities already afforded to 'town centres' through the framework provided by Class E (and other permitted development rights), the content of this Topic Paper has shown that vacant floorspace is available to accommodate an element of retail needs.

b. Planned new 'town centres' will be providing new retail floorspace to meet identified 'needs'. A key element of providing for retail needs, alongside other main town centre land uses, is via planned new centres. This has shown to be the case with the example of the former Filton Airfield (Brabazon) and which should be continued with other new 'town centres' which will feature as part of the formal centre hierarchy. The new Local Plan anticipates though that these would all come forward as local centres, with no increase beyond 12 town centres in the formal centre hierarchy.

c. New retail provision will also be provided through the development management process. It will remain the case that proposals for new retail floorspace / retail uses will come forward outside of the plan-led system and, instead, be dealt with via the development management process. An example of this is the new ALDI store at Site 20 in Cribbs Causeway. Whilst such proposals will face detailed scrutiny, they will, if permitted, go some way to meeting the needs of the retail sector and the local community.

5. Planned New Local Centres

Introduction

5.1 As noted in Section 4, the provision of new local centres within planned large-scale residential-led strategic allocations will be one of the key elements for meeting local needs for retail and other main town centre land uses in the new Local Plan.

5.2 As we have already described, four new local centres are coming forward within large residential led mixed use development projects at Ladden Garden Village (North Yate), Lyde Green, the former Filton Airfield (Brabazon) and East of Harry Stoke. These have been committed via outline planning permissions, with facilities at Ladden Garden Village, Lyde Green, and East of Harry Stoke now starting to be delivered.

5.3 Given their current and future contributions, it is entirely appropriate for the 'town centres' strategy to include these locations as defined centres.

5.4 However, further large new residential-led mixed use development projects are now proposed to be allocated in the new Local Plan. As a consequence, and in a similar manner to the above four projects, consideration is being given to whether these new proposed strategic land allocations should include provision for a planned new local centre.

5.5 This exercise is led by the appropriateness of locations to deliver strategic housing growth across South Gloucestershire, which will be informed by a wide suite of considerations ranging from infrastructure, visual impact, accessibility and transportation, natural and built environment considerations and the availability of, and need for, local community / social infrastructure facilities.

5.6 The requirement to consider the need for new local centres, containing retail and other main town centre land uses, is subservient, to a certain extent, on the main residential and site suitability considerations outlined above, and we have based our assessment upon the need to plan for a new local centre in a particular proposed draft strategic allocation (rather than influencing wider strategic allocations based upon the locational need for new local centres). As a consequence, this analysis has been prepared alongside the work being undertaken by SGC on proposed strategic allocations in the forthcoming Reg.19 consultation.

5.7 The locations which are being considered by SGC for strategic land allocations are: North Warmley, Easter Compton, New Woodlands, North Lyde 'ecotech' Village, Almondsbury, Carsons Green and Rockhouse Farm, and Charfield. For each of these locations we have considered whether they should incorporate main town centre uses and, potentially, be identified as locations for planned new local centres. This exercise has taken into account work which has already been undertaken by SGC on the potential land use mix for these potential allocations and the information which has been prepared and submitted by the promoter of each allocation. The factors which have been taken into account are: (a) the location of the site; (b) expenditure capacity generated by the proposed allocation (see below); (c) local centre and retail provision in the surrounding area; (d) commercial attractiveness of the location for retail and other main town centre land uses; (e) the information which has been submitted to date by the promoter of each location.

5.8 When making an assessment of each of these seven locations and potential allocations, we have undertaken a basic assessment of the 'ring fenced' expenditure / floorspace capacity. This is based upon the number of planned new homes in each potential allocation, which is multiplied by an average 'persons per dwelling' factor and an average 'spend per head' for convenience and comparison goods (and food/beverage outlet spending). These calculations provide a total spending capacity for convenience and comparison retail goods, plus food/beverage spending, for each location, which is then translated into a floorspace capacity equivalent (using an average sales density for each type of

use). It should be noted that this is a crude exercise given that, in reality, the expenditure / floorspace capacity in each location cannot be 'ring fenced' and will instead be subject to varying inflow and outflow influences. However, this basic assessment is nevertheless useful in providing some preliminary guidance for retail and food/beverage land use issues[14].

Easter Compton

5.9 Easter Compton is a small village to the west of the north fringe area and is being considered for a circa 250 dwelling allocation in the new Local Plan. At the present time the village has little in the way of existing facilities for local residents, which is both a reflection of its size (and associated expenditure / catchment capacity) and location close to Cribbs Causeway (and its large amount of retail stores and commercial uses). The proposed allocation of circa 250 new residential units is unlikely to materially change this situation[15] and it is therefore that the draft allocation being considered by SGC does not include any specific references to retail and / or main town centre uses.

5.10 Overall, we consider this to be the correct approach for this proposed allocation and strategy for Easter Compton. If a retail / main town centre land use element of the site allocation / development is to be considered in the future then this would be subject to the usual development management policies, including consideration of whether there is a location-specific need / requirement for such uses.

Almondsbury

5.11 The issues surrounding Almondsbury are, to a certain extent, similar to Easter Compton. The existing village is of a modest size and its current population / catchment is unable to support, on its own, a large amount of retail / main town centre land use floorspace. This is also influenced by the proximity of Cribbs Causeway and Bradley Stoke, with their larger retail, leisure and commercial land use offer. At the present time, the village does have a local independent shop which provides a valuable resource for the local community. The village does not, however, possess a local centre in the formal centre hierarchy in the current development plan.

5.12 The Reg.19 plan proposes to allocate land for new residential development on the edge of Almondsbury and the draft proposal is for a circa 350 dwelling on the edge of the village, abutting the A38 (Gloucester Road). Based upon this size of proposed allocation, there will be a modest increase in expenditure / catchment area capacity for Almondsbury, although this will not lead to significant change. The draft site allocation being considered by SGC does not propose a new defined local centre (within the allocation) although reference is made to a small convenience retail unit and / or café.

5.13 In our opinion, the size of facility contemplated by SGC is the likely size of facility which the commercial market would deliver in this location and commercial attractiveness will be boosted if this type of provision was placed next to the A38. Whilst there could be merit in including Almondsbury in the formal 'town centre' hierarchy, given that it is a

[14] When making these assessments we have adopted the following assumptions: (a) 2.4 persons per dwelling; (b) per capita expenditure of £2,675 for convenience goods, £4,051 for comparison goods, and £1,836 for food/beverage spending; (c) sales densities of £13,500/sq m (convenience goods), £5,000/sq m (comparison goods); £3,000/sq m (food/beverage); (d) per capita expenditure levels of £3,000 (convenience goods), £4,000 comparison goods, £1,300 food/beverage spending.

[15] A residential unit allocation of circa 250 dwellings is likely to generate a 'ring fenced' capacity for 120sq m net convenience goods floorspace (i.e. 250 units, times 2.4 persons per dwelling, times £2,675 per person for convenience goods spending, thus providing £1.61m. Dividing £1.61m of total convenience goods expenditure by £13,500/sq m equals circa 120ssq m net floorspace capacity). The equivalent capacity figures for comparison goods and food/beverage uses are 480sq m net and 360sq m respectively.

significant village, the ability to do so may be constrained by the lack of existing facilities. Due to the size and catchment of Almondsbury, there may also not be sufficient capacity for an additional convenience store[16].

5.14 Therefore, given that the new Local Plan should be positive in terms of ensuring that local needs are catered for in a sustainable manner, we would recommend the provision of any main town centre land uses in the proposed new allocation should be complementary to existing provision and should be subject to testing via the local centre / local facilities policy in the development plan[17].

New Woodlands

5.15 The Reg.19 plan proposes to allocate land at Woodlands golf course, adjacent to the M4/M5 motorway interchange for circa 2,400 new dwellings. The allocation would be accessed via the northern part of Bradley Stoke (from the south) and Hortham Lane (to the west[18]). The presence of the M4 and M5 presents some severance with the main part of the north fringe area, with the nearest defined 'town centres' and retail and leisure facilities lying to the south in Bradley Stoke (Pear Tree Road local centre, and The Willow Brook Centre).

5.16 The proposed allocation of circa 2,400 new residential units would provide for a large level of retail and leisure expenditure capacity[19], which should be seen alongside a potential catchment which could experience some 'outflow' of expenditure due to the location of the allocation and the presence of facilities in the north fringe (e.g. Bradley Stoke etc).

5.17 Within this context, it is noted that the promoter of this allocation is suggesting a new local centre within the proposed allocation, extending to circa 2.0 hectares. The allocation would place this provision as a planned new local centre in the defined 'town centre' hierarchy. The range of uses being considered comprise: a convenience retail store, cafe/restaurant/pub, indoor leisure facilities, community meeting space(s), nursery, GP practice, office space and some small affordable workspaces. The promoter of the allocation has identified the 'Chocolate Quarter' in Keynsham as an example of how this new local centre could be developed in the future.

5.18 Having considered the various issues surrounding this location, the potential land allocation and the surrounding context, we agree with SGC that the Woodlands allocations should include a planned new local centre. The range of uses, outlined above, appear to be appropriate and will provide the necessary day to day facilities that the local community, created by this allocation, will require. Indeed, depending upon the quality of the new local centre, a development which takes some of the characteristics of the Chocolate Quarter in Keynsham could attract some inflow of trips (although, importantly, a design code accompanying the development plan allocation and subsequent planning permissions will be the key influences over the character and appearance of the centre.

5.19 Based upon the proposed size of the residential land use element of the allocation, we would anticipate that the planned new centre should accommodate, as a minimum, a reasonable sized convenience store (which could extend to a medium-sized foodstore, subject to compliance with the impact policy test), along with a modest range of other retail, service, food/beverage and main town centre uses. Whilst it will be important for any new planned local centre to be controlled in terms of its size and function, in order that it does not become a destination in its own right, the provision of a proportionate scale and variety of main town centre uses (including convenience retail provision) will

[16] Leaving aside existing provision and housing, a 350 dwelling allocation will generate a 'ring fenced' capacity of circa 190sq m net convenience goods floorspace – e.g. 350 units x 2.4 persons per dwelling x £2,675 per capita spending = £2.25m expenditure capacity. £2.25m divided by £13,500/sq m is 170sq m net convenience goods floorspace

[17] i.e. a saved version of Policy PSP32 or any update to that policy.

[18] Which connects to the A38 Gloucester Road.

[19] 'ring fenced' capacity of 1,140sq m net convenience goods, 4,670sq m net comparison goods and 3,525sq m food/beverage floorspace. Convenience goods floorspace capacity is calculated on the basis of 2,400 dwellings x 2.4 persons per unit x £2,675 per capita convenience goods spending = £15.41m. £15.41m divided by £13,500/sq m = 1,140sq m net convenience goods floorspace.

help to provide a sustainable new neighbourhood and limit the number of trips (to some main town centre land uses) further afield.

5.20 Indeed, this latter point has, in our opinion, some merit, with a new local centre designation at Woodlands being safeguarded in order that it is allowed to grow in the future. This has some parallels with the post-war new towns movement, where 'town centre' areas were ring-fenced and allowed to grow over time to meet needs as and when they arose, thus avoiding piece-meal development / provision in separate locations. This concept, albeit on a much smaller scale may be appropriate, for the Woodlands area.

North Lyde 'ecotech' Village

5.21 Lyde Green has held the role of a strategic land allocation in South Gloucestershire over many years and lies adjacent to the Bristol & Bath Science Park. It has delivered a significant amount of new homes, along with commercial floorspace (including a small Sainsburys Local convenience store which as considered above are proposed to be designated as a new local centre). The Reg.19 plan proposes to allocate an extension to Lyde Green to the north of the M4 motorway, for the provision of circa 2,050 new homes. The proposed new allocation would be accessed via Westerleigh Road.

5.22 A new local centre is proposed within the allocation. This centre would sit adjacent to a large area of new employment land, a primary school, sports facilities, and Westerleigh Road. Given the size of the proposed allocation, there is plenty of potential for it to support a new local centre[20]. This will also be reinforced by the contribution that an adjacent large employment land allocation will make to levels of vitality. Indeed, in many instances, the availability of a proportionate amount of shops, service and other facilities will help to support the attractiveness of the employment land uses.

5.23 Overall, based upon the above characteristics, we support a strategy which provides for a planned new local centre in the North Lyde allocation. This centre can provide:

a. A reasonable convenience goods retail offer. As a minimum, a planned new local centre should ideally provide a reasonable sized convenience store. However, a slightly larger store, for example a medium-sized foodstore, may be accommodated subject to commercial and retail impact considerations[21].

b. The local centre should also provide an appropriate-sized range of other main town centre uses including Class E, D and sui generis (community, leisure and food/beverage uses). The ultimate size of the new local centre will be assessed at a future planning application stage, although it will be useful for the Local Plan allocation to provide guidance on the role and function of the new local centre. In this particular instance, the main roles will be to serve the new community, provide complementary facilities for the adjacent employment land use area, as well as serving, to a modest extent, the geographic area around the allocation.

North Warmley

5.24 A large area of north of the north of Warmley and the A420 is proposed to be allocated for residential-led development of circa 1,060 new dwellings. The content of the proposed allocation includes some limited main town centre uses within the central area, as part of a mixed use hub. At the present time, SGC is not proposing to identify North Warmley as a new local centre in the formal 'town centre' hierarchy in the new Local Plan. This is based upon the proximity of, and the need to protect, existing provision in Warmley (High Street) and Kingswood town centre.

[20] A 'ring fenced' capacity of circa 975sq m net convenience goods, 4,000sq m net comparison goods and 3,000sq m food/beverage floorspace. The convenience goods floorspace ring fenced capacity is calculated based upon: 2,050 new homes x 2.4 persons per dwelling x £2,675 spending per capita = £13.2m. £13.2m divided by a sales density of £13,500/sq m = 975sq m net convenience goods floorspace.
[21] It will be important that any medium-sized foodstore in the North of Lyde Green area does not provide an imbalance in the retail hierarchy across the north and east fringe and does not have a detrimental impact on the health of, and investment within, other existing and planned new local centres.

5.25 Overall, whilst the proposed allocation of circa 1,060 new dwellings will produce a reasonable amount of expenditure capacity[22], we consider that there is merit in the proposed approach. To provide another defined 'town centre' in this area is unlikely to achieve any notable spatial planning purpose and, instead, poses a risk to the existing local centre. There is also, as suggested by SGC, an opportunity to support Kingswood in terms of strengthening and widening its natural catchment area. As a consequence, we consider that North Warmley should not be identified as providing new local centre in the formal 'town centre' hierarchy and instead the main town centre land use provision should be placed in the central part of this area (in order to provide an easily accessible hub for residents of this new community) and comprise a modest amount of workspace (in order to meet local needs), retail, food/beverage and community uses. As a rough guide, a mixed use hub would appear to be appropriate in this particular instance, concentrating upon workspaces and neighbourhood scale retail, café and community uses.

Carsons Green and Rockhouse Farm New Neighbourhoods

5.26 Carsons Green and Rockhouse Farm New Neighbourhoods is the third largest of the proposed strategic allocations in the new Local Plan after New woodlands and North Lyde 'ecotech' Village. The proposed allocation lies to the east of the ring road, with Warmley to the south, Siston to the east and Emersons Green to the north. The proposed allocation of circa 1,930 dwellings has the potential to generate a reasonably large level of expenditure capacity[23] which, if ring-fenced, would be broadly equivalent to a reasonable sized convenience store (and, possibly, a medium-size foodstore subject to commercial and retail impact considerations). Moreover, the scale of residential provision to be allocated also dictates the need, in principle, for a range of day to day retail, leisure, commercial and other community facilities to be provided.

5.27 When reaching a conclusion on the appropriateness of including provision for a new local centre at Carsons Green and Rockhouse Farm, we consider it important to examine and take into account the following factors:

a. There are three defined town centres to the north (Emersons Green), west (Staple Hill) and south (Kingswood), although these are a reasonably long distance from the proposed allocation. There is a further slightly smaller (local) centre, at Mangotsfield. All of these centres provide local shopping and service provision in the eastern fringe, although it will also be important to provide accessible facilities to the east of the ring road.

b. In addition to the level of support which the local residential population can provide for a planned new local centre in this allocation, it should also be acknowledged that the employment land use element of this allocation also has a two-way relationship with a new centre. First, in order to be successful, employment areas should supported by a range of other uses which provide amenity to their employees and visitors. This can include modest scale retail, food/beverage and service uses, whilst a hotel use can also be an important component of the wider attractiveness of an area. Second, in these circumstances, employees and visitors associated with an employment area (both within this allocation and in the immediate surrounding area) will also be able to support the viability of the local centre which, in turn, will have an influence on the amount and type of uses which the centre can support.

c. In addition to the support for a new local centre which can be provided by local residents (within the new community) and employees (within the new employment area), it is likely that a new centre will attract some

[22] A 'ring fenced' capacity of circa 500sq m net convenience goods, 2,060sq m net comparison goods; and 1,560sq m food/beverage floorspace. By way of example, the convenience goods floorspace ring fenced capacity is calculated on the basis of: 1,060 homes x 2.4 persons per home x £2,675 spending per person = £6.81m. £6.81m divided by £13,500/sq m = 500sq m net convenience goods floorspace.
[23] Convenience goods floorspace capacity: 1,930 homes x 2.4 persons per home x £2,675 spending per person = £12.39m. £12.39m divided by £13,500/sq m = 920sq m net convenience goods floorspace.

trade from further afield, due to the location of site adjacent to the ring road. This will boost the commercial attractiveness and delivery of the new centre.

5.28 As a consequence of the above, we have reached the view that it is appropriate for SGC identify Carsons Green and Rockhouse Farm for a planned new local centre. This should include an appropriate range of Class E and D land uses, along with sui generis community and food/beverage uses. Given the location of the size and the inclusion of a large element of employment uses, there is also an opportunity for the new local centre to include appropriately-sized other main town centre uses such as a hotel. All of these uses should be of a scale which is primarily directed at meeting the needs of the new community created by the allocation and also the adjacent employment land uses (including hotel use). In light of the size and location of the employment land use element of the allocation, we consider that the most appropriate location for the new local centre is adjacent to these areas. Co-location provides the best opportunity to support the function and attractiveness of the employment land use elements, with the new centre provided in mixed use blocks which blend retail, service, community, food/beverage and other commercial uses.

Charfield

5.29 At the present time, Charfield does not possess a defined 'local centre' in the formal development plan 'town centre' hierarchy. The village has a post office and a bakery/café, along with a recently-opened new Co-op convenience store. These facilities are spread out throughout the village. The Reg.19 Local Plan proposes to include two allocations for residential led development: one on the northern edge of the village and one of the southern edge, both subject to undetermined current planning applications[24].

5.30 The southern allocation is proposed to contain a minimum of 1 Ha non residential uses including a mobility hub, community meeting space, a nursery, commercial and retail floorspace.

5.31 Based upon this context, we have considered how Charfield should fit into the planned strategy for defined local centres with the new Local Plan. As a starting point, we consider it important that Charfield is, in principle, included in the defined hierarchy. The village is an important part of the settlement structure in South Gloucestershire and the size of the existing village, along with the potential planning growth, warrants a place in the local centre tier of the 'town centre' hierarchy.

5.32 The follow-on topic for consideration is, therefore, how that defined centre should be expressed in policy terms and how the planned new residential development should be integrated with main town centre land use provision in the village.

5.33 At the present time, existing provision (Co-op, Post Office, etc) is dispersed throughout the village and the provision of additional facilities in the southern proposed land allocation will continue this trend. Therefore, the centre definition is likely to relate to all existing facilities in the centre, rather than in a defined 'traditional' single local centre boundary. As a consequence, we do not consider that any main town centre land use provision in the new allocated areas should take possession of the local centre designation. Moreover, over a number of years, Charfield has lacked some day to day retail and service facilities which could help the village to become sustainable. This has improved in recent years, with the opening of the Co-op convenience store. A further convenience store in the village in one of the new land allocations may add choice and competition, but is unlikely to be able to provide a distinct type of convenience store.

[24] SGC planning application references: P19/18237/O and P22/04260/O for up to 250 dwellings at the northern allocation, and P19/2452/O for 525 dwellings at the southern allocation.

This will be reinforced by the expenditure capacity (and overall catchment) of the village which, whilst growing, is still limited[25].

5.34 As a consequence, we would recommend that if the new allocations for residential led development in the new Local Plan are to include provision for main town centre uses then they should provide complementary uses to those already present in the village in order to widen the qualitative aspects of provision and promote sustainability (and be assessed under the saved version of criterion No.6 of Policy PSP32 to ensure that there is no loss of existing essential facilities within the village). This policy approach should also be required in order to allow any additional facilities to form part of the defined local centre in Charfield alongside the remainder of provision.

The Potential for Existing Provision to Become New Local Centres

5.35 In addition to the need to plan for new local centres as part of new strategic development allocations, the new Local Plan also has the opportunity to 'promote' existing facilities to 'local centre' status in the formal 'town centre' hierarchy where they are considered to meet the requirements for designation based upon their existing and / or future catchment areas. For the purposes of this assessment, the three locations which are being considered by SGC are: Alveston, Cheswick Village and Wick. Each location is considered in turn below.

5.36 Alveston is a reasonably sized village located to the south of Thornbury, which is proposed to be expanded by allocations for circa 190 new homes in the new Local Plan. Located at the junction of Greenhill Road and Greenhill Down is a collection of half a dozen retail and service units including a convenience store, pharmacy, hair salon, take-away, bakery/cafe and butcher. These uses are housed within two purpose-built 2-3 storey buildings. Given the size of the village and the importance of these facilities serving the day to day needs of the local community, along with the lack of other defined local centres in the wider area, we consider that it is appropriate for Alveston to be included in the local centre tier of the 'town centre' hierarchy.

5.37 Cheswick Village is a large new community which has been developed over the past 10-15 years, situated between MoD Abbey Wood, the University of the West of England campus and Lockleaze. A collection of retail, service and other commercial uses have been provided within mixed use development blocks along Long Down Avenue, including a Co-op convenience store, Boston Tea Party café, take-away, restaurant and health/beauty uses. In our opinion, the scale of provision at Cheswick Village is sufficient for it to be included as a formal local centre in the hierarchy , as it plays a similar role for the local community as the surrounding areas at Filton Avenue. The designation of this centre also fills a spatial gap in provision.

5.38 Wick is a village located to the east of the main eastern fringe area. The village is reasonably large in the context of other villages in the rural areas of South Gloucestershire, and is, in our opinion, of a size which warrants identification in the formal 'town centre' hierarchy. The nearest other existing defined local centres can be found some distance to the west at Oldland Common and Warmley, which serve their own local communities, and therefore there is a good case for Wick to possess its own defined local centre. This centre should be based upon the small collection of shops and services along Milford Avenue. (including a convenience store, barbers, take-away and café units). The need to provide Wick with a formal local centre within the 'town centre' hierarchy is reinforced in our opinion by the five proposed housing land allocations in the new Local Plan (which total circa 110 new homes).

[25] The 'ring fenced' capacity for a 775 unit allocation is: 370sq m net convenience goods, 1,500sq m net comparison goods, 1,140sq m food/beverage floorspace.

Conclusion – Planned New Local Centres

5.39 Overall, the foregoing analysis has enabled us to reach two particular conclusions regarding the issue of planned new local centres within the new Local Plan spatial strategy:

a. In order to support the proposed new strategic residential development allocations in the new Local Plan, and also support an appropriate distribution of retail and main town centre land use provision across South Gloucestershire, we recommend that the North Lyde 'ecotech' Village, Carsons Green and Rockhouse Farm, and New Woodlands allocations include a new local centre element. These new local centres should be included within the formal 'town centre' hierarchy in the Local Plan.

b. Charfield should also attract a local centre classification in the Local Plan. Whilst the planned housing growth in the village contribute to the justification for a local centre classification, this should be based on the main town centre uses in the village as a whole, rather than a planned new centre in one specific location in a new development allocation.

c. Other strategic allocations, at North Warmley and Almondsbury will also provide a modest amount of main town centre land use provision, but these uses will not be contained within a defined local centre.

d. These allocations will all make a significant contribution to meeting the needs of the local community which will arise as a consequence of the spatial development strategy in the new Local Plan. They should be seen as development plan allocations which allocate sites to provide net additional retail and main town centre land use floorspace, which will complement other parts of the town centre strategy which seeks to utilise existing centres and existing edge/out of centre provision to meet other needs.

6. Development Management Policies (Existing Policies CS14, PSP31-35) & Town Centre / Primary Shopping Area Boundaries

6.1 The final area of advice relates to the structure of strategic and development management policies for town centres and main town centre land use development in the Local Plan, along with the various 'town centre' designations to be included within the Local Plan policies map. Therefore, this section of the Topic Paper is structured to address the following:

a. The content of the new Town Centres policy.

b. Other Local Plan policies relating to local centres, shopping frontages, public houses and food & beverage uses.

c. Town centre and primary shopping area boundary definitions.

6.2 Each of above is discussed in turn below.

The 'Town Centres' Policy (a replacement for CS14 and PSP31)

6.3 As set out in the Reg.18 consultation document, the replacement for policies CS14 and PSP31 aims to bring together the main parts of both of these policies. With regards to the content of the Reg.18 consultation, we make the following comments:

a. Hierarchy of centres.

1. In line with national planning policy, we support the content of the Reg.18 consultation document which confirms the 'town centres first' approach to the location of main town centre land uses. It will be important for the policy to refer to the associated hierarchy of centres table (which should be placed alongside the policy itself) and confirm that it applies to all levels in the hierarchy.
2. Similarly, we support the approach proposed in the Reg.18 which seeks to ensure that proposals within the 'local centre' tier of the hierarchy are consistent with the scale and function of those particular centres. This will help to ensure that proposals within the lower levels of the hierarchy do not unbalance the overall hierarchy. The policy should explicitly state that this applies to both existing and planned new local centres.
3. Finally, we consider that it is entirely appropriate for the Town Centres policy to refer, for the avoidance of doubt, to those locations which are considered to be out of centre for the purposes of retail, leisure and main town centre land use policy. This will include Cribbs Causeway, The Mall, Longwell Green and Abbey Wood Retail Park.

b. Creation of new town and local centres. The new town centres policy should make a clear reference to the planned new local centres across South Gloucestershire, in terms of: (a) their place within the formal centre hierarchy; (b) their ability to meet identified needs; and (c) the need for these proposals to be considered as part of any 'impact on town centre investment' issues within impact assessments for other proposals elsewhere in South Gloucestershire.

c. Primary shopping areas & proposals in the wider town centre boundary areas. Whilst this is only likely to apply to the larger centres, which separate boundaries exist, it is important to provide a differentiated policy approach to primary shopping areas and the wider town centre boundaries:

1. For primary shopping areas, it remains important that retail uses should be prioritised and encouraged (in line with national planning policy) but, in line with the advent of Class E, it is important that the new Town Centre policy also provides conditional support for certain other main town centre uses, particularly those which add to the vitality and viability of a defined centre (through, for example, active ground floor frontages). This will extend to food/beverage uses[26], services, public/community uses and leisure facilities and should apply to both change of use and new development proposals.
2. For the remainder of the town centre areas (outside of the primary shopping areas), a slightly more relaxed approach can be taken in order to encompass all main town centre land uses, although development and change of use proposals will need to demonstrate that they can contribute to the overall health of the centre (through the use itself, and the relationship between the design of the building and the adjacent town centre environment).
3. For both of these areas, along with local centres and rural small scale facilities, there is also a need to the policy to deal with potential loss of main town centre uses in these locations to other land uses which are not preferred uses (and may not have active frontages contributing to the vitality and appearance of a centre). As a consequence, we consider it correct for the new Local Plan policy to continue to include a 'marketing' assessment criteria in order to fully explore relevant commercial demand considerations.

d. Edge of centre development proposals. Section 7 of the proposed new Town Centre policy (as contained in the Reg.18 consultation) outlines the approach to assessing main town centre proposals in edge of centre locations. The four criteria which are listed in the draft policy are considered to be appropriate, save for the following two amendments / additions. First, the policy should refer to 'suitable' and 'available'[27] when considering sequentially preferable locations. Second, it will be important for the policy to acknowledge that edge of centre definitions currently differ in national planning policy between retail and other main town centre uses[28].

e. Out of centre development proposals. Section 8 of the draft (Reg.18) takes a similar approach to out of centre main town centre land use proposals as it does to edge of centre proposals. Our comments outlined above (in part d, to edge of centre proposals) will also apply to the draft out of centre policy approach.

f. Impact assessments. It is noted that sections 9 and 10 of the draft (Reg.18) Town Centre policy deal with the proposed approach to the assessment of impact for certain types of main town centre land uses. In relation to that proposed wording:

1. If this approach, in terms of the format of the policy, is to remain then we would recommend a new sub-heading (entitled 'impact') is included. Keeping the Reg.18 approach has the advantage of avoiding repetition in both of the edge and out of centre proposals sub-sections.
2. It is recommended that the required content of impact assessments, as set out in Section 9, be retained – i.e. an assessment which separately examines the impact on town centre investment and also impact on town centre vitality and viability (thus allowing the Local Plan to conform to national policy). In relation to the 'impact on investment' test it is recommended that this also applies to an assessment of relevant proposals on the investment within planned new local centres in the defined centre hierarchy.
3. When referring to floorspace figures in Section 10 of the new policy, it should be clarified that this is gross floorspace. Further consideration of the impact assessment threshold element of the policy is contained below.

[26] Take-away food and beverage uses will also need a separate policy to deal with the specifics of this type of use.
[27] Within a reasonable period of time.
[28] Please refer to the Glossary (Annex 2) of the December 2023 version of the NPPF which classifies retail uses and edge of centre against the defined primary shopping area, alongside edge of centre for all other main town centre uses in relation to the defined town centre boundary.

4. It is noted that the draft (Reg.18) version of the Town Centre policy includes reference to office proposals. Such an approach is not in line with the current version of national planning policy[29], given that references to office impact assessments are no longer part of NPPF policy. As a consequence, unless specific justification is provided by SGC (in order to include this non-standard element), we would recommend remove of office uses from the impact assessment.

g. Markets and garden centres. We agree that it is important for the Town Centre policy in the new Local Plan to refer to the need to assess proposals associated with markets and garden centres. Both of these types of retail use can incorporate a varied range of activities which may, or may not, be inter-related. It is therefore correct for the new Local Plan to make specific reference to the need apply the sequential and impact tests in appropriate circumstances. A key part of this assessment process will be to understand whether there are any location-specific characteristics associated with particular market / garden centre proposals, or whether they are simply an amalgamation of separate retail, leisure and service uses.

h. New local centres. In addition to their inclusion in the formal centre hierarchy and site-specific policies elsewhere in the new Local Plan, we recommend that the Town Centre policy also includes a sub-section on the new planned local centres:

1. This should comprise SGC's expectations, in general terms, for these new centres in terms of their: (a) role and function; (b) scale; and (c) the need for new centres to function in harmony with other existing and new centres elsewhere in the centre hierarchy.
2. Whilst it may be more appropriate to sit within the supporting text to the Town Centre policy, it will be important for the new Local Plan to explain the general approach to planning for, and assessing the detailed content, of new local centres. This is explained in more detail in the previous sub-section of this document.

i. General assessment criteria. The final part of the main Town Centre policy in the new Local Plan is intended to provision general development management criteria for all main town centre land use proposals in all types of location across South Gloucestershire. We consider this to be a useful and much needed element to the Town Centre policy, whose criteria should be considered alongside other relevant policies in the Plan.

j. Local centres and small scale facilities. In addition to the need to include to planned new local centres, it will also be important for the new main town centres policy to make reference to small scale retailing and service facilities. The detailed assessment of such facilities will be dealt with via the saved Policy PSP32 (see below), although we consider it appropriate for the new main town centres policy to include conditional support for appropriate small scale facilities in light of the contents of paragraph 98 of the NPPF.

6.4 Outside of the scope of the Town Centre policy, including the planned new local centres, there may be a future circumstance where a further new centre is proposed via the development management process (and outside of the framework set by the Local Plan). This may be a new local centre or a larger new town centre. In either circumstance, it will be important for the Local Plan to be clear over the intended approach to the assessment of such proposals. Given that any new unplanned town centre would not be supported by the development plan strategy, the sequential and impact policy tests will apply, alongside considerations around the location-specific nature of the proposal, and its relationship with, and impact upon, the defined 'town centre' hierarchy in South Gloucestershire.

6.5 Returning to the issue of impact assessments, it is to be noted that the new town centres policy intends to retain a threshold of 350sq m. This threshold has been carried over from the existing development plan policy and sets a local

[29] As set out in the December 2023 version of the NPPF.

threshold which is lower than the national default threshold of 2,500sq m gross. This lower locally-set threshold was subject to analysis as part of the preparation of the PSP Plan and we consider it remains appropriate for inclusion in the new Local Plan. This is based upon a number of factors, including the need to ensure that the likely impact of edge and out of centre proposals on defined local centres (both new and planned) is properly taken into account, along with the relative size of existing town and local centres in contrast to existing out of centre provision across South Gloucestershire.

Policy PSP32: Local Centres & Parades

6.6 Given that the new Local Plan intends to retain a large amount of local centres within the formal centre hierarchy, we consider it important for the new Plan to retain specific reference to this type of centre. We have considered whether the current version of Policy PSP32 should be retained (in a saved form) or whether it requires revision and have concluded that the existing policy should be retained (alongside the inclusion of some points of clarification in the new main town centres policy). In particular, the following aspects have been taken into account:

a. The existing version of PSP32 deals with both local centres, and also undesignated facilities elsewhere (in both urban and rural locations). Whilst an obvious focus of PSP32 is clearly in relation to proposals affecting defined local centres, we consider it important that all of the seven existing criteria can and should relate to both in-centre locations and stand-alone locations elsewhere.

b. In order to properly interpret any saved version of PSP32, there should be clarify over the intended approach to dealing with small-scale proposals in both urban and rural locations. It may well be the case that small scale proposals under a certain size, say 350sq m gross, do not need to be subject to the sequential and impact tests if they can demonstrate a local-specific need / requirement / function. This can be clarified via the content of the new main town centres policy which deals with the application of the sequential and impact policy tests.

c. We consider that the introductory part of PSP32, which encourages all types of main town centre land uses, should remain. In particular, local centres support the day to day needs of the local community that they sit within and this a likely to require broad range of shops, service and other community facilities. As a consequence, criterion No.6 is equally as important, as it seeks to protect land uses which are important for the local community.

d. It will also be important, as a matter of clarity, for the new Local Plan to indicate that PSP32 will apply equally to existing centres and new local centres (albeit the initial development phase of planned new local centres will be covered by other policies in the Plan). This can be done via the content of the new main town centres policy.

e. The supporting text to PSP32, specifically paragraph 7.69, is now out of date, although other parts of the new Local Plan will be able to clarify that the retail and town centres policies in the new Local Plan will need to address the 2020 changes to the Use Classes Order.

Policy PSP33: Shopping Frontages

6.7 Given the removal of the requirement, in national planning policy, to define primary and secondary shopping frontages, we consider that there is no requirement to either save or update Policy PSP33 for the new Local Plan. This would match the decision of SGC to remove frontage designations from the policies map for the new Local Plan.

Policy PSP34: Public Houses

6.8 We consider that Policy PSP34 continues to serve an important purpose in relation to the future use of existing and former public house buildings. Such uses have historically provided an important focal point for both rural and urban communities and we consider that the criteria-based approach in PSP34 remains appropriate. As a consequence, we consider that Policy PSP34 should be saved in its current form.

Policy PSP35: Food & Drink Uses

6.9 The final main town centre land use policy for consideration of PSP35 – food and drink uses. This policy is intended to deal with the specific impacts associated with food and drink uses and will be considered alongside locational-themed policies such as the replacement to CS14, and PSP31. Based upon this approach, we do not consider that there is any reason why the main text of Policy PSP35 should be altered for the new Local Plan. The supporting text to the policy does refer to the previous version of the use classes order although interpretation for the current use classes order can simply be dealt with via simple references / footnotes in the new Local Plan.

Town Centre & Primary Shopping Area Boundaries

6.10 Section 3c, Appendix 1, of the December 2023 Reg.18 consultation document provides a series of proposals regarding town centre and primary shopping area boundaries for the main 'town centres' in the formal centre hierarchy in South Gloucestershire. Given that these boundaries will, to a certain extent, interact with the operation of the new town centres policies in the new Local Plan, SGC instructions for this Topic Paper include a requirement for advice on these boundary proposals. We set out our assessment and recommendations below:

a. General comment. Use the town centre boundary for impact assessments. PSA for retail sequential test.

b. Yate. The PSA and town centre boundaries in Yate are noticeably different, with a large town centre boundary defined to include the whole from Station Road between the PSA and the town's railway station. This is a long-standing policy approach and reflects the presence of a number of commercial / main town centre land uses along Station Road. The proposed amendments to the town centre remove a number of residential areas from the boundary which we consider are appropriate (as they no longer include any main town centre land uses). In relation to the PSA boundary, this currently extends across the whole of the core town centre area between Station Road, Link Road and Kennedy Way, along with the Morrisons store and the northern part of the Riverside development. The opening of the Riverside development prompts a re-consideration of the existing PSA boundary due to: (a) the need to properly take account of the Riverside area; and (b) the need for consistently in relation to the three retail facilities located outside of the traditional town centre core[30]. We consider that the two main options for an update to the PSA are as follows: (1) include the Lidl and Riverside areas (in addition to Morrisons) with the PSA (alongside the core town centre area; or (2) reduce the PSA to just the existing premises within the core town centre area within Station Road, Kennedy Way and Link Road. The current NPPF definition for a PSA is "Defined area where retail development is concentrated". Based upon this definition, we would recommend that the former option is pursued on the basis that the Riverside, Lidl and Morrisons areas are close enough, both physically and functionally, to the core town centre area to be classified as part of the main concentration of retail uses.

c. Chipping Sodbury. Only minor refinements are shown in relation to the town centre boundary in Chipping Sodbury. These are in order to reflect the 'as built' area of the Waitrose supermarket and other minor

[30] Morrisons, Lidl and Riverside.

amendments to reflect the definition of town centre areas. These are considered to be reasonable and warranted.

d. Thornbury. Only minor refinements are shown in relation to the town centre and PSA boundaries in Thornbury. These are proposed in order to reflect the definition of town centre areas, as set out in the NPPF. These are considered to be reasonable and warranted.

e. Patchway. The December 2023 Reg.18 consultation shows a series of significant changes to the town centre and PSA boundaries in Patchway. The scale of these changes are unsurprising given the fact that the existing boundaries were defined when the centre was proposed to be expanded as part of the Charlton Hayes development. In relation to the town centre boundary, these changes show a much smaller area, in order to exclude those areas which have been developed for residential rather than main town centre uses. Similarly, the two PSA boundary areas in both parts of the centre, particularly the southern element, is much smaller given decision to provide smaller retail and commercial units in the Charlton Hayes development (than originally intended). We consider that these amendments are warranted and provide an accurate reflection of the current layout of this newly defined town centre.

f. Bradley Stoke. A series of amendments to the PSA and town centre boundaries in Bradley Stoke are shown, including: the removal of highway infrastructure from the town centre boundary, and a modest extension in the PSA to reflected the committed extension to the Willow Brook Centre. The consequence of this latter amendment is to remove the retail development allocation, as promoted by Policy PSP31. We consider that these relatedly minor refinements, particularly in relation to the town centre boundary, are justified by the actual layout and function of this town centre.

g. Filton. The minor amendments shown to remove the residential land use area in the northern part of this centre are considered to be appropriate and justified.

h. Stoke Gifford. A number of changes to the PSA and town centre boundaries in Stoke Gifford are shown. In addition, the retail development allocation areas would be removed. In relation to this latter point, we consider that the removal of these two allocations is justified by the evidence contained elsewhere in this report. In relation to the boundary changes, we recommend that the PSA boundary is extended to cover the retail element of the recently developed Baylis Estates mixed use development, but not changes are made to the wider town centre boundary.

i. Emersons Green. Alongside the minor amendments to the town centre boundary, the Reg.18 consultation document shows removing an area of existing car parking provision from the PSA boundary. This latter amendment is considered to be justified on the basis that the existing boundary does not fully meet the current NPPF PSA definition.

j. Downend. The shown minor amendments to remove highway infrastructure and residential areas from the town centre boundary are considered to be appropriate and justified. In relation to the latter aspect, we consider it correct for the boundary to exclude these areas as they do not provide land uses which support the main function of the centre.

k. Staple Hill. The relatively minor changes to the defined town centre boundary for Staple Hill, which exclude a number of small areas of residential land use, are considered to be reasonable and justified. It is noted that Page Park remains as part of the proposed town centre boundary. This large area of open space (along with associated facilities) does not necessarily conform to the core definition of town centre areas in the NPPF

although it nevertheless provides an important attractor / destination for the local community and thus complements over adjacent uses which attract large amounts of people.

l. Kingswood. The Reg.18 consultation document shows some relatively minor alternations to the PSA and town centre boundaries in Kingswood. These included the removal of various residential areas around the edge of the town centre boundary and a small eastwards extension to include the Sainsburys Local convenience stores. All of these (minor) changes are, in our opinion, reasonable and make the updated boundaries in Kingswood more reflective of NPPF town centre / PSA definitions.

m. Hanham. The proposed changes to the boundaries in Hanham town centre, as set out in the Reg.18 consultation, are reasonably significant. A driver of one of the main changes is removal of the area around the Kleeneze site due to the expiry of the planning permission for a supermarket development on that site. Whilst the grant of planning permission for that supermarket development was a sign that it was an appropriate location for retail development at that point in time, the decision not to allocate that site for retail development means that it is appropriate to remove it from the PSA and town centre boundaries (and thus return it to an edge-of-centre location). The other main change relates to the tightening of the town centre boundary around the western and central parts of the centre, along with a proposed eastwards extension to reflect the current pattern of retail and other main town centre land uses in this location. This is also considered to be appropriate and justified by the evidence from recent town centre land use surveys.

7. Summary and Conclusions

7.1 This Topic Paper on retail and town centre planning policy issues has been prepared by Nexus Planning for South Gloucestershire Council in relation to the new South Gloucestershire Local Plan. It is intended to provide an additional document for the Local Plan's evidence base library and assist SGC as it prepares the next stage of the draft Local Plan (Regulation 19) and its subsequent submission to the Secretary of State for Examination.

7.2 In order to support the Regulation 19 consultation version of the draft Local Plan and its subsequent submission to the Secretary of State, this document has addressed the following retail and town centre issues:

a. Given that the previous SGC development plan evidence base retail studies were produced in 2010 and 2011, and supplemented by additional work in 2014 & 2015, there is a requirement for the Local Plan evidence base to be informed by information and analysis on up-to-date retail, leisure and town centre trends.

b. To provide updated evidence regarding the changing pattern of land uses in the main 'town centres' in South Gloucestershire

c. An assessment of how previously assessed needs have been met and a review of the draft new Local Plan position which does not seek to make a further specific retail land use allocations

d. A review of the planned new local centres within strategic land allocations, include the need for, and the content of, these centres.

e. Advice on development management policies and amendments to town centre and primary shopping area boundaries within the Phase 3 Reg.18 consultation to inform updates proposed at Reg.19.

Retail Hierarchy

7.3 This Study has considered the current development plan hierarchy for defined 'town centres' in South Gloucestershire, alongside steps which are being taken to implement previously-planned new centres and opportunities for further new centres (as part of the development strategy in the new Local Plan). As a consequence, the following conclusions and recommendations have been reached:

a. There is merit is consolidating the top tier of centres by: (a) retaining the existing 10 town centres; and (b) moving Stoke Gifford and Patchway into this tier also. Whilst the size and detailed characteristics of these 12 centres differ, they all perform a very important function for the local communities that they sit within.

b. There is a need to confirm that three new centres, which were originally proposed as part of the existing development plan – Filton Airfield, East of Harry Stoke and Ladden Garden Village – should now be confirmed as formal parts of the local centre tier in the hierarchy, together with Lyde Green.

c. Finally, in light of development strategy within the new Local Plan, particularly the planned level of new residential development across South Gloucestershire, we have also recommended that: (a) Charfield village, Alveston, Cheswick Village and Wick gain the status of a local centre; and (b) the proposed allocations at New Woodlands, North Lyde 'ecotech' Village and Carsons Green and Rockhouse Farm new Neighbourhoods also include planned new local centres.

Planning for Retail Land Uses

7.4 Part of the retail and town centres strategy in the adopted development plan (Core Strategy and PSP Plan) has been to allocate land for new comparison goods retail development based upon quantitative need forecasts prepared around a decade ago. That strategy has been re-visited within this Study and with reference to economic and retail expenditure trends over the past decade, events which have occurred around these development plan allocations, along with other planning permissions for retail development and wider land use trends.

7.5 Having assessed these factors, this Study has reached the conclusion that it is reasonable to move away from a quantitative need led approach to planning for retail land uses and, instead, base the new Local Plan strategy on a wider range of indicators. This should be based upon a series of core principles which provide a positive approach to the district's 'town centres' as part of a strategy which allows the new Local Plan to meet retail 'needs' alongside other main town centre land uses in the following ways:

a. New / replacement floorspace will naturally be encouraged by the Council's positive planning strategy for existing 'town centres'. Even without specific site / area allocations, the new Local Plan is able to provide for a positive policy environment to provide new retail land uses within defined 'town centres'. In addition to the opportunities already afforded to 'town centres' through the framework provided by Class E (and other permitted development rights), the content of this Topic Paper has shown that vacant floorspace is available to accommodate an element of retail needs.

b. Planned new 'town centres' will be providing new retail floorspace to meet identified 'needs'. A key element of providing for retail needs, alongside other main town centre land uses, is via planned new centres. This has shown to be the case with the example of the former Filton Airfield (Brabazon) and which should be continued with other new 'town centres' which will feature as part of the former centre hierarchy in the new Local Plan.

c. New retail provision will also be provided through the development management process. It will remain the case that proposals for new retail floorspace / retail uses will come forward outside of the plan-led system and, instead, be dealt with via the development management process. An example of this is the new ALDI store at Site 20 in Cribbs Causeway. Whilst such proposals will face detailed scrutiny, they will, if permitted, go some way to meeting the needs of the retail sector and the local community.

Planned New Local Centres

7.6 As set out above, this Study has recommended that the formal 'town centre' hierarchy in Gloucestershire should contain three planned new local centres, along with the inclusion of the village of Charfield as a local centre (in recognition of its growing level of existing provision and planned new residential development), Alveston, Cheswick Village and Wick. This Study has provided guidance and recommendations regarding the scale and function of these planned new local centres, including the level of foodstore provision therein. It is recommended that the new main town centres policy in the Local Plan contains a series of key principles for the planned new local centres, including:

a. The role and function of the new centres is primarily focused upon meeting the day to day requirements of the new communities in which they are located.

b. The policy allocations for the strategic development areas in which these new local centres site should be clear over the role and function of each centre (in order to avoid future mis-interpretation of policy). The policy should also be clear over the requirements for future planning applications relating to these strategic development areas and their new local centres, particularly around the assessment impact.

c. Our recommendations also include the status that these planned new centres will have in terms of the application of development management policy, including the need to consider them in the context of sequential site assessments and impact assessments (including impact on investment issues).

7.7 Finally, this Study has also provided recommendations regarding the various development management policies in the new Local Plan which are associated with retail and town centre issues. These recommendations include:

a. The content of the new strategic retail and town centres policy which will replace Policy CS14 of the Core Strategy and Policy PSP31 of the PSP Plan. This policy will cover a wide range of matters, including the approach to applying the sequential and impact policy tests, the locally-set impact assessment threshold (350sq m gross), the approach to dealing with small scale facilities in urban and rural areas, along with the approach to assessing proposals within town centre / primary shopping area boundaries.

b. The retention of Policy PSP32 (local centres and parades), with guidance to be provided as part of the new strategic retail/town centres policy clarify the interpretation of PSP32.

c. The removal of Policy PSP33, in light of the loss of the shopping frontages definitions from the development plan policies map.

d. Retention of the policies relating to public houses and hot food take-aways.

e. Recommendations have also been made regarding updates and amendments for the town centre and primary shopping area boundaries on the development map. The majority of amendments are minor in nature and respond to natural land use changes in the main centres in recent years and the need to ensure that both types of boundary respond to the current NPPF definitions. A larger change is proposed for the primary shopping area in Yate town centre in order to ensure that the PSA definition concentrates upon the main concentration of existing retail properties and allows for future change to occur in the wider town centre (which will contribute to the health of the centre).

Appendix A:

Land Use Summary Data for the Main Town Centres in South Gloucestershire

TABLE 1: LAND USE COMPOSITION OF BRADLEY STOKE TOWN CENTRE - 2013, 2017 & 2024

	2013		2017		2024		Change, 2013-2024		Change, 2017-2024	
	No.	%	No.	%	No.	%	No.	%	No.	%
HISTORIC USE CLASSES										
A1	17	58.6%	18	62.1%	18	60.0%	1	1.4%	0	-2.1%
A2	5	17.2%	4	13.8%	3	10.0%	-2	-7.2%	-1	-3.8%
A3	3	10.3%	3	10.3%	5	16.7%	2	6.3%	2	6.3%
A4	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
A5	2	6.9%	2	6.9%	2	6.7%	0	-0.2%	0	-0.2%
B1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B8	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C3	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
D1	1	3.4%	1	3.4%	2	6.7%	1	3.2%	1	3.2%
D2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
SG	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Vac	1	3.4%	1	3.4%	0	0.0%	-1	-3.4%	-1	-3.4%
Total	29	100.0%	29	100.0%	30	100.0%	1		1	
CURRENT USE CLASSES										
E	25	86.2%	25	86.2%	27	90.0%	2	3.8%	2	3.8%
B2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B8	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C3	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
F1	1	3.4%	1	3.4%	1	3.3%	0	-0.1%	0	-0.1%
SG	2	6.9%	2	6.9%	2	6.7%	0	-0.2%	0	-0.2%
Vac	1	3.4%	1	3.4%	0	0.0%	-1	-3.4%	-1	-3.4%
Total	29	100.0%	29	100.0%	30	100.0%	1		1	

Notes: land use data for 2013 and 2017 provided by South Gloucestershire, and updated to October 2024 by Nexus Planning.

TABLE 2: LAND USE COMPOSITION OF FILTON TOWN CENTRE - 2013, 2017 & 2024

	2013		2017		2024		Change, 2013-2024		Change, 2017-2024	
	No.	%	No.	%	No.	%	No.	%	No.	%
HISTORIC USE CLASSES										
A1	20	54.1%	17	45.9%	18	47.4%	-2	-6.7%	1	1.4%
A2	3	8.1%	3	8.1%	4	10.5%	1	2.4%	1	2.4%
A3	4	10.8%	4	10.8%	6	15.8%	2	5.0%	2	5.0%
A4	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
A5	2	5.4%	3	8.1%	3	7.9%	1	2.5%	0	-0.2%
B1	1	2.7%	0	0.0%	0	0.0%	-1	-2.7%	0	0.0%
B2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B8	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C1	1	2.7%	1	2.7%	1	2.6%	0	-0.1%	0	-0.1%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C3	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
D1	3	8.1%	3	8.1%	4	10.5%	1	2.4%	1	2.4%
D2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
SG	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Vac	3	8.1%	6	16.2%	2	5.3%	-1	-2.8%	-4	-11.0%
Total	37	100.0%	37	100.0%	38	100.0%	1		1	
CURRENT USE CLASSES										
E	30	81.1%	26	70.3%	31	81.6%	1	0.5%	5	11.3%
B2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B8	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C1	1	2.7%	1	2.7%	1	2.6%	0	-0.1%	0	-0.1%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C3	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
F1	1	2.7%	1	2.7%	1	2.6%	0	-0.1%	0	-0.1%
SG	2	5.4%	3	8.1%	3	7.9%	1	2.5%	0	-0.2%
Vac	3	8.1%	6	16.2%	2	5.3%	-1	-2.8%	-4	-11.0%
Total	37	100.0%	37	100.0%	38	100.0%	1		1	

Notes: land use data for 2013 and 2017 provided by South Gloucestershire, and updated to October 2024 by Nexus Planning.

TABLE 3: LAND USE COMPOSITION OF STOKE GIFFORD - 2024

	2024	
	No.	%
HISTORIC USE CLASSES		
A1	4	36.4%
A2	0	0.0%
A3	1	9.1%
A4	1	9.1%
A5	0	0.0%
B1	0	0.0%
B2	0	0.0%
B8	0	0.0%
C1	3	27.3%
C2	0	0.0%
C3	0	0.0%
D1	0	0.0%
D2	1	9.1%
SG	0	0.0%
Vac	1	9.1%
Total	11	100.0%
CURRENT USE CLASSES		
E	7	63.6%
B2	0	0.0%
B8	0	0.0%
C1	3	27.3%
C2	0	0.0%
C3	0	0.0%
F1	0	0.0%
SG	0	0.0%
Vac	1	9.1%
Total	11	100.0%

Notes:
October 2024 Nexus Planning land use survey.

TABLE 4: LAND USE COMPOSITION OF PATCHWAY TOWN CENTRE - 2019 & 2024

	2019		2024		Change, 2019-2024	
	No.	%	No.	%	No.	%
HISTORIC USE CLASSES						
A1	5	23.8%	7	33.3%	2	9.5%
A2	2	9.5%	2	9.5%	0	0.0%
A3	0	0.0%	2	9.5%	2	9.5%
A4	0	0.0%	0	0.0%	0	0.0%
A5	5	23.8%	3	14.3%	-2	-9.5%
B1	0	0.0%	0	0.0%	0	0.0%
B2	0	0.0%	0	0.0%	0	0.0%
B8	0	0.0%	0	0.0%	0	0.0%
C1	0	0.0%	0	0.0%	0	0.0%
C2	0	0.0%	0	0.0%	0	0.0%
C3	0	0.0%	0	0.0%	0	0.0%
D1	5	23.8%	5	23.8%	0	0.0%
D2	0	0.0%	0	0.0%	0	0.0%
SG	2	9.5%	2	9.5%	0	0.0%
Vac	2	9.5%	0	0.0%	-2	-9.5%
Total	21	100.0%	21	100.0%	0	
CURRENT USE CLASSES						
E	8	38.1%	12	57.1%	4	19.0%
B2	0	0.0%	0	0.0%	0	0.0%
B8	0	0.0%	0	0.0%	0	0.0%
C1	0	0.0%	0	0.0%	0	0.0%
C2	0	0.0%	0	0.0%	0	0.0%
C3	0	0.0%	0	0.0%	0	0.0%
F1	4	19.0%	4	19.0%	0	0.0%
SG	7	33.3%	5	23.8%	-2	-9.5%
Vac	2	9.5%	0	0.0%	-2	-9.5%
Total	21	100.0%	21	100.0%	0	

Notes: land use data for 2019 provided by South Gloucestershire, and updated to October 2024 by Nexus Planning.

TABLE 5: LAND USE COMPOSITION OF KINGSWOOD TOWN CENTRE - 2013, 2017 & 2024

	2013		2017		2024		Change, 2013-2024		Change, 2017-2024	
	No.	%	No.	%	No.	%	No.	%	No.	%
HISTORIC USE CLASSES										
A1	74	46.5%	77	50.0%	66	44.3%	-8	-2.2%	-11	-5.7%
A2	32	20.1%	29	18.8%	26	17.4%	-6	-2.7%	-3	-1.4%
A3	7	4.4%	8	5.2%	7	4.7%	0	0.3%	-1	-0.5%
A4	4	2.5%	3	1.9%	6	4.0%	2	1.5%	3	2.1%
A5	3	1.9%	5	3.2%	10	6.7%	7	4.8%	5	3.5%
B1	6	3.8%	5	3.2%	2	1.3%	-4	-2.4%	-3	-1.9%
B2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B8	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C3	6	3.8%	8	5.2%	8	5.4%	2	1.6%	0	0.2%
D1	4	2.5%	3	1.9%	8	5.4%	4	2.9%	5	3.4%
D2	2	1.3%	1	0.6%	2	1.3%	0	0.1%	1	0.7%
SG	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Vac	21	13.2%	15	9.7%	14	9.4%	-7	-3.8%	-1	-0.3%
Total	159	100.0%	154	100.0%	149	100.0%	-10		-5	
CURRENT USE CLASSES										
E	122	76.7%	120	77.9%	104	69.8%	-18	-6.9%	-16	-8.1%
B2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B8	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C3	6	3.8%	8	5.2%	8	5.4%	2	1.6%	0	0.2%
F1	2	1.3%	2	1.3%	5	3.4%	3	2.1%	3	2.1%
SG	8	5.0%	9	5.8%	18	12.1%	10	7.0%	9	6.2%
Vac	21	13.2%	15	9.7%	14	9.4%	-7	-3.8%	-1	-0.3%
Total	159	100.0%	154	100.0%	149	100.0%	-10		-5	

Notes: land use data for 2013 and 2017 provided by South Gloucestershire, and updated to October 2024 by Nexus Planning.

TABLE 6: LAND USE COMPOSITION OF STAPLE HILL TOWN CENTRE - 2013, 2017 & 2024

	2013		2017		2024		Change, 2013-2024		Change, 2017-2024	
	No.	%	No.	%	No.	%	No.	%	No.	%
HISTORIC USE CLASSES										
A1	79	55.6%	79	54.1%	70	47.0%	-9	-8.7%	-9	-7.1%
A2	17	12.0%	14	9.6%	10	6.7%	-7	-5.3%	-4	-2.9%
A3	7	4.9%	8	5.5%	7	4.7%	0	-0.2%	-1	-0.8%
A4	4	2.8%	5	3.4%	7	4.7%	3	1.9%	2	1.3%
A5	11	7.7%	12	8.2%	16	10.7%	5	3.0%	4	2.5%
B1	5	3.5%	4	2.7%	4	2.7%	-1	-0.8%	0	-0.1%
B2	1	0.7%	1	0.7%	0	0.0%	-1	-0.7%	-1	-0.7%
B8	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C3	9	6.3%	11	7.5%	11	7.4%	2	1.0%	0	-0.2%
D1	3	2.1%	6	4.1%	12	8.1%	9	5.9%	6	3.9%
D2	0	0.0%	0	0.0%	4	2.7%	4	2.7%	4	2.7%
SG	0	0.0%	0	0.0%	3	2.0%	3	2.0%	3	2.0%
Vac	6	4.2%	6	4.1%	5	3.4%	-1	-0.9%	-1	-0.8%
Total	142	100.0%	146	100.0%	149	100.0%	7		3	
CURRENT USE CLASSES										
E	109	76.8%	108	74.0%	101	68.2%	-8	-8.5%	-7	-5.7%
B2	1	0.7%	1	0.7%	0	0.0%	-1	-0.7%	-1	-0.7%
B8	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C3	9	6.3%	11	7.5%	11	7.4%	2	1.1%	0	-0.1%
F1	2	1.4%	3	2.1%	3	2.0%	1	0.6%	0	0.0%
SG	15	10.6%	17	11.6%	28	18.9%	13	8.4%	11	7.3%
Vac	6	4.2%	6	4.1%	5	3.4%	-1	-0.8%	-1	-0.7%
Total	142	100.0%	146	100.0%	148	100.0%	6		2	

Notes: land use data for 2013 and 2017 provided by South Gloucestershire, and updated to October 2024 by Nexus Planning.

TABLE 7: LAND USE COMPOSITION OF HANHAM TOWN CENTRE - 2013, 2017 & 2024

	2013		2017		2024		Change, 2013-2024		Change, 2017-2024	
	No.	%	No.	%	No.	%	No.	%	No.	%
HISTORIC USE CLASSES										
A1	33	37.5%	30	34.1%	33	38.8%	0	1.3%	3	4.7%
A2	19	21.6%	17	19.3%	9	10.6%	-10	-11.0%	-8	-8.7%
A3	2	2.3%	4	4.5%	4	4.7%	2	2.4%	0	0.2%
A4	2	2.3%	2	2.3%	2	2.4%	0	0.1%	0	0.1%
A5	1	1.1%	1	1.1%	1	1.2%	0	0.0%	0	0.0%
B1	4	4.5%	4	4.5%	6	7.1%	2	2.5%	2	2.5%
B2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B8	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C3	16	18.2%	19	21.6%	18	21.2%	2	3.0%	-1	-0.4%
D1	6	6.8%	5	5.7%	8	9.4%	2	2.6%	3	3.7%
D2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
SG	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Vac	5	5.7%	6	6.8%	4	4.7%	-1	-1.0%	-2	-2.1%
Total	88	100.0%	88	100.0%	85	100.0%	-3		-3	
CURRENT USE CLASSES										
E	60	68.2%	57	64.8%	56	65.9%	-4	-2.3%	-1	1.1%
B2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B8	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C3	16	18.2%	19	21.6%	18	21.2%	2	3.0%	-1	-0.4%
F1	4	4.5%	3	3.4%	4	4.7%	0	0.2%	1	1.3%
SG	3	3.4%	3	3.4%	3	3.5%	0	0.1%	0	0.1%
Vac	5	5.7%	6	6.8%	4	4.7%	-1	-1.0%	-2	-2.1%
Total	88	100.0%	88	100.0%	85	100.0%	-3		-3	

Notes: land use data for 2013 and 2017 provided by South Gloucestershire, and updated to October 2024 by Nexus Planning.

TABLE 8: LAND USE COMPOSITION OF DOWNEND TOWN CENTRE - 2013, 2017 & 2024

	2013		2017		2024		Change, 2013-2024		Change, 2017-2024	
	No.	%	No.	%	No.	%	No.	%	No.	%
HISTORIC USE CLASSES										
A1	29	50.0%	28	46.7%	26	47.3%	-3	-2.7%	-2	0.6%
A2	15	25.9%	13	21.7%	12	21.8%	-3	-4.0%	-1	0.2%
A3	5	8.6%	9	15.0%	9	16.4%	4	7.7%	0	1.4%
A4	1	1.7%	1	1.7%	1	1.8%	0	0.1%	0	0.2%
A5	2	3.4%	2	3.3%	1	1.8%	-1	-1.6%	-1	-1.5%
B1	1	1.7%	3	5.0%	0	0.0%	-1	-1.7%	-3	-5.0%
B2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B8	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C3	3	5.2%	3	5.0%	3	5.5%	0	0.3%	0	0.5%
D1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
D2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
SG	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Vac	2	3.4%	1	1.7%	3	5.5%	1	2.0%	2	3.8%
Total	58	100.0%	60	100.0%	55	100.0%	-3		-5	
CURRENT USE CLASSES										
E	50	86.2%	53	88.3%	47	85.5%	-3	-0.8%	-6	-2.9%
B2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B8	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C3	3	5.2%	3	5.0%	3	5.5%	0	0.3%	0	0.5%
F1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
SG	3	5.2%	3	5.0%	2	3.6%	-1	-1.5%	-1	-1.4%
Vac	2	3.4%	1	1.7%	3	5.5%	1	2.0%	2	3.8%
Total	58	100.0%	60	100.0%	55	100.0%	-3		-5	

Notes: land use data for 2013 and 2017 provided by South Gloucestershire, and updated to October 2024 by Nexus Planning.

TABLE 9: LAND USE COMPOSITION OF EMERSONS GREEN TOWN CENTRE - 2013, 2017 & 2024

	2013		2017		2024		Change, 2013-2024		Change, 2017-2024	
	No.	%	No.	%	No.	%	No.	%	No.	%
HISTORIC USE CLASSES										
A1	12	46.2%	12	46.2%	15	57.7%	3	11.5%	3	11.5%
A2	6	23.1%	6	23.1%	2	7.7%	-4	-15.4%	-4	-15.4%
A3	5	19.2%	5	19.2%	5	19.2%	0	0.0%	0	0.0%
A4	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
A5	1	3.8%	1	3.8%	1	3.8%	0	0.0%	0	0.0%
B1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B8	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C3	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
D1	2	7.7%	2	7.7%	2	7.7%	0	0.0%	0	0.0%
D2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
SG	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Vac	0	0.0%	0	0.0%	1	3.8%	1	3.8%	1	3.8%
Total	26	100.0%	26	100.0%	26	100.0%	0		0	
CURRENT USE CLASSES										
E	25	96.2%	25	96.2%	24	92.3%	-1	-3.8%	-1	-3.8%
B2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B8	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C3	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
F1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
SG	1	3.8%	1	3.8%	1	3.8%	0	0.0%	0	0.0%
Vac	0	0.0%	0	0.0%	1	3.8%	1	3.8%	1	3.8%
Total	26	100.0%	26	100.0%	26	100.0%	0		0	

Notes: land use data for 2013 and 2017 provided by South Gloucestershire, and updated to October 2024 by Nexus Planning.

TABLE 10a: LAND USE COMPOSITION OF YATE TOWN CENTRE - 2013, 2017 & 2024 (excluding Station Road)

	2013		2017		2024		Change, 2013-2024		Change, 2017-2024	
	No.	%	No.	%	No.	%	No.	%	No.	%
HISTORIC USE CLASSES										
A1	67	59.8%	76	63.9%	71	62.3%	4	2.5%	-5	-1.6%
A2	14	12.5%	13	10.9%	12	10.5%	-2	-2.0%	-1	-0.4%
A3	4	3.6%	9	7.6%	9	7.9%	5	4.3%	0	0.3%
A4	2	1.8%	2	1.7%	2	1.8%	0	0.0%	0	0.1%
A5	1	0.9%	2	1.7%	3	2.6%	2	1.7%	1	1.0%
B1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B8	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C3	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
D1	3	2.7%	4	3.4%	6	5.3%	3	2.6%	2	1.9%
D2	1	0.9%	4	3.4%	4	3.5%	3	2.6%	0	0.1%
SG	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Vac	20	17.9%	9	7.6%	7	6.1%	-13	-11.7%	-2	-1.4%
Total	112	100.0%	119	100.0%	114	100.0%	2		-5	
CURRENT USE CLASSES										
E	87	77.7%	102	85.7%	95	83.3%	8	5.7%	-7	-2.4%
B2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B8	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C3	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
F1	2	1.8%	2	1.7%	5	4.4%	3	2.6%	3	2.7%
SG	3	2.7%	6	5.0%	7	6.1%	4	3.5%	1	1.1%
Vac	20	17.9%	9	7.6%	7	6.1%	-13	-11.7%	-2	-1.4%
Total	112	100.0%	119	100.0%	114	100.0%	2		-5	

Notes: land use data for 2013 and 2017 provided by South Gloucestershire, and updated to October 2024 by Nexus Planning.

TABLE 10b: LAND USE COMPOSITION OF YATE TOWN CENTRE - 2024 (including Station Road)

	2024	
	No.	%
HISTORIC USE CLASSES		
A1	89	40.6%
A2	20	6.9%
A3	11	5.1%
A4	2	1.1%
A5	3	1.7%
B1	0	0.0%
B2	0	0.0%
B8	0	0.0%
C1	0	0.0%
C2	0	0.0%
C3	14	0.0%
D1	15	3.4%
D2	7	2.3%
SG	1	0.0%
Vac	13	4.0%
Total	175	100.0%
CURRENT USE CLASSES		
E	128	54.3%
B2	0	0.0%
B8	0	0.0%
C1	0	0.0%
C2	0	0.0%
C3	14	0.0%
F1	9	2.9%
SG	11	4.0%
Vac	13	4.0%
Total	175	100.0%

Notes:
Data includes Table 11a and Station Road, Yate (October 2024 Nexus land use survey).

TABLE 11: LAND USE COMPOSITION OF CHIPPING SODBURY TOWN CENTRE - 2013, 2017 & 2024

	2013		2017		2024		Change, 2013-2024		Change, 2017-2024	
	No.	%	No.	%	No.	%	No.	%	No.	%
HISTORIC USE CLASSES										
A1	50	38.2%	52	37.7%	48	35.0%	-2	-3.1%	-4	-2.6%
A2	18	13.7%	17	12.3%	15	10.9%	-3	-2.8%	-2	-1.4%
A3	7	5.3%	5	3.6%	6	4.4%	-1	-1.0%	1	0.8%
A4	5	3.8%	6	4.3%	6	4.4%	1	0.6%	0	0.0%
A5	1	0.8%	1	0.7%	1	0.7%	0	0.0%	0	0.0%
B1	9	6.9%	11	8.0%	17	12.4%	8	5.5%	6	4.4%
B2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B8	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C1	1	0.8%	1	0.7%	1	0.7%	0	0.0%	0	0.0%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C3	26	19.8%	27	19.6%	27	19.7%	1	-0.1%	0	0.1%
D1	9	6.9%	9	6.5%	9	6.6%	0	-0.3%	0	0.0%
D2	1	0.8%	1	0.7%	1	0.7%	0	0.0%	0	0.0%
SG	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Vac	4	3.1%	8	5.8%	6	4.4%	2	1.3%	-2	-1.4%
Total	131	100.0%	138	100.0%	137	100.0%	6		-1	
CURRENT USE CLASSES										
E	90	68.7%	91	65.9%	89	65.0%	-1	-3.7%	-2	-1.0%
B2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B8	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C1	1	0.8%	1	0.7%	1	0.7%	0	0.0%	0	0.0%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C3	26	19.8%	27	19.6%	27	19.7%	1	-0.1%	0	0.1%
F1	4	3.1%	4	2.9%	7	5.1%	3	2.1%	3	2.2%
SG	6	4.6%	7	5.1%	7	5.1%	1	0.5%	0	0.0%
Vac	4	3.1%	8	5.8%	6	4.4%	2	1.3%	-2	-1.4%
Total	131	100.0%	138	100.0%	137	100.0%	6		-1	

Notes: land use data for 2013 and 2017 provided by South Gloucestershire, and updated to October 2024 by Nexus Planning.

TABLE 12: LAND USE COMPOSITION OF THORNBURY TOWN CENTRE - 2013, 2017 & 2024

	2013		2017		2024		Change, 2013-2024		Change, 2017-2024	
	No.	%	No.	%	No.	%	No.	%	No.	%
HISTORIC USE CLASSES										
A1	66	43.4%	67	43.5%	67	45.0%	1	1.5%	0	1.5%
A2	27	17.8%	24	15.6%	15	10.1%	-12	-7.7%	-9	-5.5%
A3	7	4.6%	8	5.2%	11	7.4%	4	2.8%	3	2.2%
A4	6	3.9%	6	3.9%	7	4.7%	1	0.8%	1	0.8%
A5	2	1.3%	3	1.9%	3	2.0%	1	0.7%	0	0.1%
B1	3	2.0%	5	3.2%	6	4.0%	3	2.1%	1	0.8%
B2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B8	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C3	13	8.6%	14	9.1%	16	10.7%	3	2.2%	2	1.6%
D1	9	5.9%	10	6.5%	10	6.7%	1	0.8%	0	0.2%
D2	1	0.7%	1	0.6%	1	0.7%	0	0.0%	0	0.0%
SG	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Vac	18	11.8%	16	10.4%	13	8.7%	-5	-3.1%	-3	-1.7%
Total	152	100.0%	154	100.0%	149	100.0%	-3		-5	
CURRENT USE CLASSES										
E	110	72.4%	112	72.7%	107	71.8%	-3	-0.6%	-5	-0.9%
B2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B8	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C1	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
C3	13	8.6%	14	9.1%	16	10.7%	3	2.2%	2	1.6%
F1	3	2.0%	3	1.9%	3	2.0%	0	0.0%	0	0.1%
SG	8	5.3%	9	5.8%	10	6.7%	2	1.4%	1	0.9%
Vac	18	11.8%	16	10.4%	13	8.7%	-5	-3.1%	-3	-1.7%
Total	152	100.0%	154	100.0%	149	100.0%	-3		-5	

Notes: land use data for 2013 and 2017 provided by South Gloucestershire, and updated to October 2024 by Nexus Planning.

Appendix B

Major Retail Floorspace Commitments in South Gloucestershire

MAJOR RETAIL, LEISURE & TOWN CENTRE COMMITMENTS (October 2024)

SCHEME	LOCATION	CONTENT	MAIN TOWN CENTRE LAND USE ELEMENTS				
			1	2	3	4	5
Site 20, Baylis Estates & ALDI (P23/01302/F)	Cribbs Causeway (out-of-centre)	Proposed new ALDI foodstore and mixed use (outline) unit for main town centre uses / B8.	ALDI foodstore: 1,315sq m net sales (80% conveneince goods sales).	Outline element: Classes E(a)(b)(c)(d)(e), Class B8, plus car dealership/workshop, and hot-food take-away uses. Any use of the floorspace hereby permitted for Class E(a) use shall be restricted to the sale of comparison goods.			
Bradley Stoke - New Foodstore Unit (P22/03780/F)	Willow Brook Centre (Bradley Stoke Town Centre)	Approved: 26/6/2023. Expires: 26/6/2026. Permitted unit: 2,114sq m gross. Planning permission supersedes previous permission, granted at appeal for 3,100sq m of comparison / retail floorspace.	Foodstore: 2,114sq m gross (within extension of 1,114sq m). No restrictions over the permitted floorspace, but unit intended to be occupied as a foodstore.				
Stoke Gifford, Baylis Estates (P20/05916/F)	Fox Den Road, Stoke Gifford	Mixed use: hotel, retail, F&B, mixed use units. (under construction Feb 2024)	ALDI foodstore: 1,785sq m gross	103 bedroom hotel (4,383 sq m Use class C1)	167sq m food/beverage unit.	1,500sq m gross mixed use unit. Use Classes E(a-c), F1, F2	
Brabazon (former Filton Airfield) (P22/02113/O)	Filton	Large residential-led mixed use scheme. Main town centre uses include up to 25,000sq m of Class E(a/b/c/d) uses, 3no. hotels and two gym faciltiies. The level of comparison goods floorspace shall not exceed 5,000sq m GIA.	E(a) convenience: 7,000sq m gross (not formally controlled)	E(a) comparison: 5,000sq m gross maximum (controlled by planning condition)		2no. Gym facilities	3no. Hotels
Cribbs Triangle (PT14/0565/O & P21/05036/RM)	Cribbs Causeway	Mixed use development, including foodstore unit. Approved: January 2021 outline, November 2022 Reserved Matters.	Foodstore: 1,422sq m net sales (80% convenience goods sales).				
Longwell Green (P20/22431/O)	Kingswood Industrial Estate	Proposed redevelopment of the indistrial estate to provide a mixture of Class E, B2, B8 and sui generis uses. Flexible outline planning permission, including 'up to' amounts for retail and food/beverage uses.	Option B - Zone 1 - Up to 3,685sq m GIA of Class E(a) , E(c)(i)(ii)(iii),(E(d) retail floorspace.	Zone 2 - 2,323 sq m GIA of E (d) E(g)(i), (ii), (iii), B2, B8/trade with ancillary showrooms	Detailed Approval P23/02261/RM for Zone 3 - 1951 sq m GIA of E (d) E(g)(i), (ii), (iii), B2, B8/trade with ancillary showrooms	Zone 4 - Option A 520 sq m GIA of Class E(b) and sui generis food/beverage uses.	
Severnside (P23/02089/F)	Central Park - Adjacent M49 J1	Roadside facility compromising of petrol filling station and associated convenience store (sui generis), coffee shop/ drive thru (Class E) and 2no. restaurant/drive thrus (Class E),	Convenience Store 495 sq m associated with Sui Generis Petrol Station	2no. Drive-thru Restaurants & 1no. Coffee Drive-thru Class E(b) total 735 sq m			
Stoke Gifford (P20/08495/F)	Abbey Wood Retail Park	hotel (Class C1) and food and beverage retail unit (Class A1) (under construction Feb 2024)	Hotel 2,670 sq m Use Class C1	Food and beverage unit 170 sq m			
Harlequin Office Park (P23/00568/F)	Emersons Green	1no. single storey Drive Thru retail / bakery unit and 1 no. part single storey and part two storey Drive Thru restaurant (Sui Generis). Approved June 2023	Gregg's retail / bakery unit 164 sq m	drive thru McDonalds restaurant 441 sq m			

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