Bath and North East Somerset

City and Town Centres Study

October 2004

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GLOSSARY OF TERMS

Class A1	Commercial units classed as retail or shop uses within the Use Classes Order.
Class A1 Services	Non retail uses classed as A1 within the Use Classes Order, such as hairdressers, travel agents and dry cleaners.
Class A2	Commercial units classed as financial or professional services, for example banks and building societies, within the Use Classes Order.
Class A3	Commercial units classed as food or drink outlets, for example pubs, restaurants and takeaways, within the Use Classes Order.
Convenience Goods	Consumer goods purchased on a regular basis, including food and groceries and cleaning materials.
Comparison Goods	Durable goods such as clothing, household goods, furniture, DIY and electrical goods.
Higher order comparison goods	Durable goods which tend to be high value, bought on an occasional basis and/or where customers are most likely to shop around and compare products in different shops e.g. adult fashion items, high value electrical goods, jewellery, furniture etc. Customers are usually prepared to tend to travel further to purchase these items.
Lower order comparison goods	Durable goods which tend to be lower value, bought on a regular basis and/or where customers are less likely to shop around e.g. small household goods, books, pharmaceutical and toiletries. Customers are less likely to travel long distances to purchase these items.
Net floorspace	Retail floorspace devoted to the sale of goods, excluding storage space.
Gross floorspace	Total external floorspace.
Multiple traders	National or regional *'chain store'* retailers.
Experian	A data consultancy who are widely used for retail planning information.
Goad Plans	Town centre plans prepared by Experian, which are based on occupier surveys of over 1,200 town centres across the country.
Zone A Rent	The annual rental charge per square foot for the first 20 foot depth of a shop unit, which is the most suitable measure for standardising and comparing rental levels.
Market share Penetration rate	The proportion of total consumer expenditure within a given area taken by a particular town centre or shopping facility.
Focus Retail	A published source of information providing known retail and leisure operators' space requirements in towns across the country.

EXECUTIVE SUMMARY

Purpose of the Study

Nathaniel Lichfield & Partners (NLP) were commissioned by Bath & North East Somerset District Council to prepare a City and town centres, retail and leisure study, including an assessment of the four main town centres, namely Bath, Keynsham, Midsomer Norton and Radstock. The key aim of the study is to provide a strategy for development up to 2011 in line with the Local Plan period. The study commenced in January 2004 and included extensive survey research as follows:

- a survey of over 1,000 households within B&NES and parts of neighbouring authorities;
- a street survey or 1,300 visitors in the four main centres; and
- a postal questionnaire to over 200 retail/commercial leisure operators, including those with existing representation with the District and operators not currently represented.

The Potential for New Retail Development

Convenience Retailing (Food and Grocery)

An assessment of available expenditure and existing shopping patterns within the District suggests that convenience goods retail floorspace within B&NES is trading above average in 2004.

In qualitative terms the provision of food superstores is poorest in the south of Bath.

At 2011, estimated convenience expenditure is projected to exceed the benchmark turnover by £48.9 million. This surplus expenditure estimate could, in theory be available to support new convenience sales floorspace, over and above existing commitments.

Additional Food Store and Convenience Goods Floorspace Projections

	2004 to 2007	2004 to 2011
Surplus Expenditure £M		
Bath	30.29	41.27
Keynsham	-1.58	0.86
Midsomer Norton/Radstock	2.69	6.77
Total	**31.40**	**48.90**
Net Sales Floorspace Sq M*		
Bath	2,754 to 3,029	3,752 to 4,127
Keynsham	n/a	78 to 86
Midsomer Norton/Radstock	245 to 269	615 to 677
Total	**2,999 to 3,298**	**4,445 to 4,890**

*average turnover density of £10,000 to £11,000 per sq m net

Comparison Retailing

The assessment of available expenditure and shopping patterns within B&NES suggests that existing comparison sales floorspace is trading very well, despite significant levels of expenditure leakage to outside of the District. Operator demand for comparison floorspace within the District also appears to be strong, and the shop vacancy rate is below average.

Shopping comparison floorspace in Bath is estimated to be trading well above benchmark levels in 2004 (27% above, £477.42 million compared with the benchmark turnover of £374.35 million). Whilst this means that there is in theory surplus expenditure available to support additional capacity, the impact that this reduction in turnover would have must be considered when making allocations for new floorspace in the local plan.

A substantial proportion (58%) of the identified capacity is required just to meet need arising from growth in expenditure and population, and to allow for some degree of reduction in expenditure leakage.

The remaining capacity is derived from reducing existing overtrading levels to benchmark averages. If the total additional comparison floorspace projections are implemented by 2011 along with the Southgate development, then the residual turnover of existing comparison shopping facilities in Bath is expected to reduce to the benchmark figure (£401 million), which is about 16% lower than current 2004 trading levels (£477 million).

Even though the city centre is trading well it may not be desirable to plan for growth which has such an impact.

A range of floorspace requirements has therefore been derived which considers the minimum amount of floorspace required to meet growth in expenditure and to allow for some reduction in leakage, and the maximum amount of capacity available if trading levels were reduced to benchmarks.

This should be regarded as broad guidance on future provision, and must be considered in conjunction with qualitative requirements – how new floorspace might complement and reinforce centres rather than compete – and the consequential impact(s) on existing centres and their constituent retailers and other occupier uses. This qualitative assessment will assist in deciding to what extent new retail floorspace will be acceptable at the upper end of this range.

Additional Comparison Goods Floorspace Projections in B&NES

Type	Minimum Sales Floorspace (Sq. M. Net)* 2004 to 2011	Maximum Sales Floorspace (Sq. M. Net)* 2004 to 2011
High Street Comparison	16,750	26,500
Large Format Comparison	9,500	15,300

Since most of this floorspace is to be located in Bath, separate floorspace projections are provided for the city.

Projected Maximum and Minimum Comparison Floorspace Need in Bath (2011)

	Minimum floorspace requirement (sq m net)	**Maximum Floorspace Capacity (sq m net)**
Bath High Street Comparison	13,700	23,400
Bath Large Format	8,200	14,050
Bath Total	**21,900**	**37 450**

The Need for Commercial Leisure Development

B&NES has a modest selection of commercial leisure facilities which does not reflect the potential catchment population. Most facilities are small independent establishments.

The population of B&NES (over 173,000) is in theory capable of supporting many commercial leisure facilities including multiplex cinemas, ten pin bowling, nightclubs, bingo and large private health clubs. Therefore, there is potential consumer demand to provide a range of leisure and entertainment facilities within B&NES, if suitable development opportunities can be found.

The Hierarchy and B&NES' Centres

Bath

Bath City Centre is the main shopping and commercial centre in B&NES. It has a large number of retail and service uses. The centre serves shoppers across B&NES, particularly for comparison shopping. It attracts a large number of tourists and visitors from beyond B&NES, however, its catchment area overlaps with Bristol to which there is a high degree of expenditure leakage.

Bath is a very historic city and its status as a World Heritage Site affords it significant planning protection. As a result the shop sizes and formats in the centre have remained largely unaltered so that they tend to be smaller than more modern purpose built floorspace.

Consequently the number of multiple retailers within Bath is not comparable with those available in Bristol. However, it does have a greater representation of 'high quality' retail outlets, especially fashion shops, and a vibrant collection of 'niche' retail units.

If Bath is to maintain its current market share and reduce the levels of leakage to Bristol, then the strategy must seek realistic and sustainable expansion of the city centre. However, if the Council does not plan further ahead then there is a danger that Bath will experience a gradual decline in its role in relation to its competitors in the long term. If the Council wish to respond to long-term demand it will be necessary to promote, safeguard and assemble opportunity sites within the short term, recognising that these opportunities may take a number of years to implement.

Other Centres

Keynsham and Midsomer Norton both have a reasonable range and choice of shops and services which meet most of the shopping needs of their immediate catchment population.

However, within Keynsham, the outflow of convenience expenditure to Bristol is significant, particularly for bulk food shopping trips. There is potential to improve food store provision in Keynsham, which could help to claw back expenditure leakage from Keynsham's primary catchment area.

Radstock is a much smaller centre which needs additional retail and leisure development to support its designation as a town centre.

The other centres should absorb a small amount of the identified floorspace capacity over the plan period, in keeping with their current market shares in the District.

1.0 INTRODUCTION

The Study

1.1 Nathaniel Lichfield & Partners (NLP) were commissioned by Bath and North East Somerset (B&NES) to prepare an assessment of the four main retail centres within the authority area, i.e. Bath, Keynsham, Midsomer Norton and Radstock. NLP previously prepared a similar study for B&NES in 2000, referred to now on as the 2000 Study.

1.2 The 2004 study contained within this report involved four main stages of work:

- Stage 1 - Data collection including household and street interviews.
- Stage 2 - Retail capacity assessment and centre health checks.
- Stage 3 - Identification of potential development options.
- Stage 4 - Strategy formulation.

1.3 The main study objectives are to:

- establish the comparison and convenience retail floorspace requirements up to 2011 for the city and town centres;
- assess the vitality and viability of these centres based on the measures listed in PPG6;
- examine how the viability and vitality of each centre has changed since 2000 and establish a framework for monitoring viability and vitality up to 2008;
- assess demand from national and multiple retailers and leisure operators;
- identify the capacity of each centre to accommodate retail growth and to undertake an examination of the impact that potential growth may have on the centres, in terms of vitality and viability, environmental quality and traffic generation;
- assess relative suitability of different locations for future retail floorspace;
- examine the impact from other competing centres; and
- examine how the viability and vitality of each centre can be maintained and/or increased.

Content of the Report

1.4 Section 2.0 provides an overview of the national, regional and local planning policy context. Section 3.0 provides a description of the shopping hierarchy in B&NES and the surrounding area and the role performed by the four main centres.

1.5 Sections 4.0 and 5.0 summarise the results of a household survey and on-street visitor surveys in the four centres. Sections 6.0 to 9.0 provide town centre health checks for Bath City Centre, Keynsham, Midsomer Norton and Radstock town centres.

1.6 Sections 10.0 to 12.0 set out an analysis of shopping and commercial leisure needs within B&NES and assess the ability of existing facilities to meet the needs of the community.

1.7 Section 13.0 assesses the opportunities to accommodate the future need for new retail and leisure development, including an initial appraisal of potential development sites. A retail and town centre policy review is included at Section 14.0 and recommendations and conclusions are contained at Section 15.0.

2.0 PLANNING POLICY CONTEXT

National Policy

2.1 PPG6: Town Centres and Retail Development (Revised, June 1996) sets out the Government's policies on retail. Draft PPS6 was published in December 2003, and will replace PPG6 later this year. Given that PPS6 is only in draft form, PPG6 is still the appropriate national policy context against which the objectives of this study should be considered. However, draft PPS6 does raise important issues that should be considered by the Council.

2.2 The Government's objectives are to focus retail uses in town, district and local centres (Paragraph 1.1) and to ensure the availability of shops, employment, services and facilities to people by a choice of transport means, and this remains unchanged within Draft PPS6. Local planning authorities (LPAs) are advised in paragraph 1.3 to adopt policies which:

- locate major generators of travel in existing centres;
- enable town, district and local centres to meet the needs of residents of their area;
- safeguard and strengthen existing local centres, which offer a range of everyday community, shopping and employment opportunities;
- maintain and improve choice for people to walk, cycle or catch public transport; and
- ensure an appropriate supply of attractive, convenient and safe parking for shopping and leisure trips.

2.3 Annex B, Paragraph 4 of PPG6 offers specific guidance to LPAs on the formulation of policies for retail development, including the need to:

- take account of broad forecasts of retail demand and how the retail sector is likely to want to respond to that demand over the plan period, by reference to location;
- consider the existing and likely relationships between the centres in the area. Different types of centre should be clearly defined in the plan, indicating the policy approach to be followed and the potential in each centre for change; and to
- identify a range of suitable sites on which the demand for developments might be best met, with particular attention to their accessibility by a choice of means of transport.

2.4 Draft PPS6 also requires Councils to undertake assessments of need for other non-retail town centre uses, i.e. commercial leisure and office development. This study assesses the retail and commercial leisure needs of Bath and North East Somerset.

2.5 The question of *'need'* for development is referred to several times in PPG6:

- town, district and local centres should meet the *'needs'* of residents in their area (Paragraph 1.3); and
- LPAs should consider the *'need'* for new development such that, if there is no *'need'* or capacity for further development, there will be no requirement to identify additional sites. (Paragraph 1.10).

2.6 There has been some debate about what is meant by *'need'*. In February 1999, Richard Caborn MP (then Planning Minister) sought to clarify the issue in a written answer to a parliamentary question. He stated:

> *'In the context of PPG6 and this additional guidance, the requirement to demonstrate 'need' should not be regarded as being fulfilled simply by showing that there is capacity (in physical terms) or demand (in terms of available expenditure within the proposal's catchment area) for the proposed development. Whilst the existence of capacity or demand may form part of the demonstration of need, the significance in any particular case of the factors which may show need, will be a matter for the decision-maker.'*

2.7 This statement was considered in a debate on supermarkets on 24 June 1999:

> *'What does 'need' mean? In that written answer, I said that, first, would-be developers must demonstrate that need does not mean simply an assertion by the developer that there is a market demand. It means that the local planning authority must consider the wider needs of the community as well as the market demand before it accepts a proposal. If the local authority is satisfied that a need exists, it must also be satisfied that the sequential test has been applied in selecting the site.*
>
> *Even then, the local authority must also consider whether there will be an adverse impact on the existing centre before it allows the proposal to go forward.'*

2.8 More recently, Tony McNulty MP (Parliamentary-under-Secretary to the Deputy Prime Minister) also addressed this issue. This statement in April 2003 indicated that greater weight is to be placed on quantitative rather than qualitative need. Where goods are proposed to be sold, evidence will be required on the (quantitative) need for each type of goods. He also suggested that regeneration or employment generation are not indicators of need but may be material considerations.

2.9 Draft PPS6 endorses the McNulty statement, giving greater weight to quantitative need. However, draft PPS6 guidance also states that qualitative need may be a consideration that provides additional justification for a proposal. Other local issues, although not necessarily elements of *need,* can be important material considerations.

2.10 Draft PPS6 indicates that if development plans fail to adequately reflect PPS6 guidance, the First Secretary of State may intervene in determining planning applications or use his powers of direction to seek changes to plans. We believe that the draft PPS6 proposes some important policy changes which will have significant implications for local planning authorities, particularly relating to plan preparation and town centre development.

2.11 A major change suggested by draft PPS6 is the more proactive role councils should play in identifying town centre development sites. Assessments of need and the identification of sites are expected to be undertaken in consultation with the development industry, and reviewed in annual monitoring reports.

2.12 The draft guidance clearly states that local planning authorities should plan positively for growth by making provision for a range and choice of shopping and services. If a 'need' for new development is established, it will be necessary to identify opportunities to meet that need. Draft PPS6 indicates that local authorities should plan for growth in their town centres and should allocate sufficient sites to meet anticipated demand for the next five years. Draft PPS6 also suggests that an apparent lack of sites of the right size and in the right location should not be construed as an obstacle to site allocation and development to meet this need. Local planning authorities should consider the scope for effective site assembly using their compulsory purchase (CPO) powers to ensure that suitable sites within or on the edge of centres are brought forward for developments.

2.13 This suggests the onus is placed on the Council to identify sites to accommodate the 5-year demand for development. This study provides floorspace projections up to 2011 (a 12-year period). Therefore, it may be more appropriate for the Council to seek to identify opportunities to accommodate projections up to 2011.

2.14 The draft PPS6 also suggests specific provision should be made for large store formats as these may be difficult to accommodate in relatively small town centres. Therefore edge-of-centre sites (where available) may need to be considered.

2.15 The draft guidance also places greater emphasis on the regeneration of town centres, particularly smaller centres, the need to define a network of centres and, where appropriate, to plan for the decline of some centres. Local authorities are expected to set upper limits on the scale of new floorspace appropriate in each town, district and local centre within Development Plan Documents. Local authorities must also plan in a way which avoids the over-concentration of development in large regional/sub-regional centres. Therefore, it may be inappropriate to plan in a way that could significantly increase the leakage of expenditure to larger sub-regional centres outside B&NES, e.g. Bristol, Cribbs Causeway, Cheltenham and Swindon. This study has reviewed these issues and provides recommendations which will assist the local plan in responding to the emerging PPS6.

2.16 PPG6 sets out the sequential approach to site selection for new retail development (paragraph 1.11), namely that first preference should be for town centre sites where suitable sites or buildings suitable for conversion are available, followed by edge-of-centre sites, district and local centres and only then out-of-centre sites in locations that are accessible by a choice of means of transport.

2.17 Current government guidance in PPG6 indicates that all major proposals for new retail floorspace, including redevelopment or extensions to existing out-of-centre stores, is required to follow the sequential approach to site selection. This draft guidance suggests it would be inappropriate to expect some bulky goods retail warehouse operators to split their store into separate smaller elements when applying the sequential approach.

2.18 Draft PPS6 contains a proposed new policy relating to the sequential approach. Paragraphs 3.17 and 3.18 indicate that:

> *"Local planning authorities should take into account any genuine difficulties in operating the applicant's business model from the sequentially preferable site, such as where a retailer would be required to provide a significantly reduced range of products."*
>
> *"A single retailer, however, should not be expected to split their store into separate sites."*

2.19 Although this is only draft guidance, PPS6 does suggest that care is required in applying the sequential approach to large stores such as retail warehouses and that the business models of these operators should be taken into account.

2.20 The Government Response to the Environment Committee on Environmental Impact of Supermarket Competition and Speech by Mr Raynsford of 29 February 2000 commented on the Government's approach to the sequential approach in relation to the issue of flexibility and the potential disaggregation of the proposed retail use.

2.21 Mr Raynsford's speech identified an inconsistency in the approach taken by decision makers on this issue with some accepting a format approach, i.e. a claim that the preferred store format cannot fit into town centre sites, with others taking the view that the class of goods sold is important, such that the question becomes whether the goods could be sold from town centre sites/premises. He confirmed that the Government's policy is the latter, commenting that most goods can and should be sold from town centres.

2.22 PPG6 advises that the sequential approach requires flexibility and realism, with developers and retailers being flexible about the format, design of the development and the amount of car parking and local planning authorities being sensitive to the needs of retailers. Whilst the Government Response stated that the Government's policy is to adopt a class of goods approach, Draft PPS6 suggests it would be inappropriate to ignore the advantages of a particular format of retailing for selling particular types of goods. There is no suggestion in PPG6 that retail warehouses should not exist except in town centre locations and this appears to be endorsed in draft PPS6. Paragraph 3.3 of PPG6 specifically identifies that some types of retailing such as large stores selling bulky goods may not be able to find suitable sites either in town centres. The guidance does not indicate that the concept of such stores is unacceptable if bulky goods can be sold in town centre locations. However this needs to be considered in the context of advice that seeks to focus retail development wherever possible in town centres. In balancing these factors the key issues appear to be:

- the extent to which the proposed use can be realistically disaggregated into smaller parts;
- the extent to which categories of goods could be sold in town centre locations;
- the minimum size of unit which could perform a similar function; and

- the appropriate amount of car parking and collection points.

Planning Policy Guidance Note 13: Transport (PPG 13, March 2001)

2.23 The key objectives, set out at paragraph 4 of PPG13 are to integrate planning and transport, in order to:

- *"promote more sustainable transport choices for both people and for moving freight;*
- *promote accessibility to jobs, shopping, leisure facilities and services by public transport; and*
- *reduce the need to travel, especially by car."*

2.24 The Guidance advises that planning policies should seek to promote the vitality and viability of existing town centres, which should be the preferred locations for new retail and leisure developments. When this development cannot be accommodated in or on the edge of existing centres, it may be appropriate to combine the proposal with existing out-of-centre developments.

RPG10: Regional Planning Guidance for the South West

2.25 The regional planning framework for the South West is provided by RPG10, approved in 2001. Bath is within the Northern Sub Region of the South West and is one of its Principal Urban Areas (PUAs). Within PUAs, a balance of housing and employment in towns with good facilities and services should be provided and thereby reducing the need to travel to the PUAs.

2.26 Policy EC6 states that local authorities should ensure that development is located where it can help to reduce the need to travel, as well as:

- *seek to locate developments which attract large numbers of people including retail, leisure, commercial activity and public activities in the centres of the PUAs and in other designated centres for growth specified in the spatial strategy;*
- *encourage town centre developments of an appropriate scale in the market towns and larger settlements elsewhere in the region in keeping with their size and function;*
- *ensure that the vitality and viability of existing centres, including suburban centres, is protected and enhanced, notably by assessing the need for new development and by applying the sequential approach in PPG6 to site selection for new retail and leisure developments (for convenience shopping, a distribution*

of provision should be maintained that minimises the lengths and frequency of trips, so that any settlement of a reasonable size has access to all normal day to day necessities. Such provision should be in keeping with the scale of the centre and the catchment that it conveniently serves so as not to encourage longer trips or to undermine the viability of nearby centres); and

- *make no further provision for proposals to build or extend major regional or sub-regional out of town shopping centres. Any proposal to extend or redevelop the existing regional shopping centre at Cribbs Causeway should be brought forward and fully justified in a future review of Regional Planning Guidance.*

2.27 Within Bath, Policy SS9 states that the local authority, infrastructure and transport providers and other agencies should:

- *ensure that Bath's unique environment is conserved and enhanced; and*
- *recognise the need for economic development that enhances its role as a centre for business, cultural activities, retailing and tourism.*

The Joint Replacement Structure Plan

2.28 The Joint Structure Plan for Bath and North East Somerset, Bristol, North Somerset and South Gloucestershire, identifies Bath as a '*City Centre*' and Keynsham, Midsomer Norton and Radstock as '*Major Town and District Centres*'. The vitality and viability of city, sub regional, town, local and village centres will be maintained and enhanced in making provision for the changing requirements of the catchment populations. Policy 38 states that:

> *'For city, sub regional, major town and district centres, provision will be made to improve the range and quality of shopping, community, leisure and related facilities, and to encourage high density, mixed use developments, including residential and business units, integrated with improvements to access by public transport and for pedestrians and cyclists, and traffic management and car parking strategies.'*

2.29 Bath is identified as a *'Major Regional Shopping and Business Centre'* and is also designated in its entirety as a World Heritage Site.

2.30 Policy 6 of the Structure Plan states that;

> *'In Bath, development and transport proposals will maintain and enhance the City's economic and social prosperity, and its role as a regional centre and a focus for tourism whilst safeguarding and contributing to its status as a World Heritage Site…'*

2.31 This will require provision for the improvement of shopping and related facilities as required to safeguard and enhance the vitality and viability of the City Centre and its district and local centres.

2.32 In line with RPG10, the Joint Structure Plan also states that provision to meet requirements for new retail development will be made within the city, sub-regional, major town and district centres where suitable sites are available, followed by edge of centre sites and then minor town, district, local and village centres and where consistent with Policy 38.

Local Planning Context

2.33 The Bath and North East Somerset Revised Deposit Draft Local Plan was published for consultation in October 2003.

2.34 The hierarchy of shopping centres in B&NES is identified in the Revised Deposit Draft Plan in Policy S.1 and includes:

- **City Centre**: Bath Central Shopping Area;
- **Town Centres**: Keynsham Town Centre
Midsomer Norton Town Centre
Radstock Town Centre
- **District Centre**: Moorland Road, Bath

2.35 Policy S.2 states that Retail development within the shopping centres listed in Policy S.1 and defined on the proposals map will be permitted where it:

i) is of a scale and type that is consistent with the existing retail function of the centre; and

ii) is well integrated into the existing shopping pattern.

2.36 Policy S.3 allocates two sites for retail development, namely Charlton Road in Keynsham and the Southgate area in Bath to meet demand for new floorspace up to 2006.

2.37 Policy S.4 considers that retail proposals including large scale development and any extensions to existing retail units, outside Bath central shopping area and other centres defined in Policy S.1 will only be permitted where there is a demonstrable need for the development. The proposal is to be located in accordance with the sequential approach, where first preference is for suitable city/town centre sites, followed by edge of centre, district and local centres and only then out of centre sites and that the proposal, either by itself or together with other shopping proposals, will not harm the vitality and viability of any of the shopping centres identified in Policy S.1.

2.38 Proposals for development in the primary shopping frontages for Bath, Keynsham, Midsomer Norton and Radstock which result in the loss of a shop use (Class A1) from a ground floor premises will not be permitted (Policy S.5).

2.39 Policy S.6 relates to Class A3 uses within and adjacent to Bath central Shopping Area. It states that proposals for A3 uses, including variations to existing consents, within and adjoining Bath central shopping area will only be permitted where they preserve or enhance the character of that part of the Conservation Area and they do not have an unacceptable impact on the amenity of residential occupiers.

2.40 Policy S.8 prevents the loss of existing Class A1 shop uses within district and local centres where the vitality and viability of the centre would be adversely affected. Policy S.9 prevents the loss of dispersed local shops.

3.0 THE SHOPPING HIERARCHY AND CATCHMENT CHARACTERISTICS

Major Shopping Centres in B&NES and the Surrounding Area

3.1 Bath City Centre is the main shopping centre within B&NES. The city centre attracts shoppers from across B&NES and beyond. The other three smaller town centres in B&NES are lower order centres that do not compete directly with Bath. These centres primarily serve day to day shopping and service needs. Bath City Centre competes with other major shopping destinations in the sub-region including Bristol, Cheltenham and Swindon. The household survey undertaken in this study indicates that the catchment areas of these major centres overlap. The smaller town centres in B&NES fall within these overlapping catchment areas.

3.2 Management Horizons' Europe UK Shopping Index 2003/2004 provides an index of retail centres on the basis of a weighted score for multiple retailers represented in each centre. This index ranks Bath City Centre 28th out of 1,672 centres across Great Britain, and the third highest ranked centre in the sub-region behind Bristol and Cheltenham, although Bath's MHE score is only just below these two centres.

3.3 Management Horizon's rank for other shopping centres in the sub-region, including smaller centres within and near the study area is shown in Table 3.1. Bristol is ranked 23rd and Cheltenham 24th. Swindon, Gloucester and Cribbs Causeway are the other main centres within the sub-region, but these centres are ranked below Bath City Centre. However, the Swindon's score and rank exclude the Outlet Village within Swindon.

3.4 Keynsham is ranked 685th and at a much lower level in the hierarchy than Bath City Centre. Keynsham has a similar MHE score and rank to Clevedon, Street and Melksham. Midsomer Norton is ranked slightly below Keynsham and is ranked 912th out of the 1,672 centres across Great Britain. Radstock is a very small centre and is not identified within Management Horizon's rankings as the centre has a limited number of multiple retailers.

Table 3.1: Management Horizons UK Shopping Index 2003/04

MHE Venue	MHE Index Score 2003 – 2004	2003-2004 Ranking	Rank change 2003-04 from 2000-01
Bristol	225	23	Going Down
Cheltenham	223	24	No Change
Bath	**214**	**28**	**Going Up**
Swindon	181	47	Going Up
Gloucester	147	89	Going Down
Bristol, Cribbs Causeway	139	100	Going Down
Bristol, Clifton	73	257	Going Up
Trowbridge	61	317	Going Down
Chippenham	56	351	Going Down
Yate	56	351	Going Up
Bristol, Bedminster	47	415	Going Up
Swindon, Outlet Village	44	445	Going Down
Frome	37	524	Going Up
Warminster	36	538	Going Down
Bristol, Kingswood	35	546	Going Down
Clevedon	30	624	Going Up
Keynsham	**27**	**685**	**Going Down**
Street	26	716	Going Up
Melksham	25	743	Going Up
Midsomer Norton	**20**	**912**	**n/a**
Portishead	14	1268	n/a
Shepton Mallet	14	1268	n/a
Dursley	12	1449	n/a

Source: Management Horizon Europe (2003/4).

Development Plan Definitions

3.5 The Bath and North East Somerset Local Plan (Revised Deposit 2003) emphasises as crucial that the central shopping areas within Bath continue to serve its many roles and that its current healthy market position and attractiveness is maintained. Bath City Centre serves the convenience and comparison shopping needs of the local population. In addition it is a regional retail and leisure centre and also contains a number of international tourist attractions. Midsomer Norton and Keynsham serve the day to day shopping needs of local residents and Radstock town centre provides a limited range of local shopping facilities, dominated by the Radco general store.

3.6 As indicated earlier, Bath City Centre competes with Cheltenham and Bristol shopping centres and these centres have overlapping catchment areas. Midsomer Norton and Radstock are located to the south west of Bath and fall within Bath's catchment area. Keynsham is located to the west of Bath, approximately equi-distance between Bath and Bristol. Keynsham falls within the overlapping catchment areas of Bath and Bristol and the town's catchment area is influenced by its close proximity to Bristol. In addition to the City centre and three town centres, there are several local centres within B&NES. These local centres are generally characterised by a small cluster of shops serving basic local needs.

Development within Centres

3.7 Retail and leisure proposals within centres should be appropriate in terms of scale and nature to the existing role of the centre, as indicated in Junior Planning Minister Tony McNulty's statement (10th April 2003) which states:

> *"In applying the sequential approach, the relevant centres in which to search for sites will depend on the nature and scale of the proposed development and the catchment area the development seeks to serve, as set out in the Caborn statement. The scale of such proposals should also be appropriately related to the centre of the catchment that the development seeks to serve. The First Secretary of State therefore wishes to make it clear that development that would serve a wide catchment should be located in a centre that serves a similar catchment area."*

3.8 Draft PPS6 also suggests that local authorities should set upper limits on the scale of development that will be appropriate within town, district and local centres.

3.9 Government guidance suggests that development proposals within centres should not serve a much wider catchment area than the existing centre.

Socio-Economic Characteristics within B&NES

3.10 Shopping needs may vary considerably, often related to socio-economic characteristics. For example, residents without access to a car or those on low incomes will have different needs to those who are mobile by car or who enjoy higher income. Lower income groups without access to a car may be less able to travel to shopping facilities and may also be socially excluded from high priced shops. Therefore, the availability of discount or value retail facilities may be important for these groups. The socio-economic characteristics of B&NES have been examined and compared with the County and national averages.

3.11 Car ownership in B&NES (77.9% of households) is slightly below the south west average (79.8%), but is above the UK average (72.6%), as shown in Table 3.2. Car ownership is usually higher in predominantly rural areas such as B&NES, where opportunities for public transport are generally more limited. High car ownership does not necessarily imply higher levels of affluence.

Table 3.2: Car Ownership 2001

Characteristic	% Households 2001		
	B&NES	South West	UK Average
Car Ownership			
Two or more	33.0	33.6	28.8
One	44.9	46.2	43.8
None	22.0	20.2	27.4

Sources: 2001 Census of Population

3.12 B&NES has a slightly high proportion of economically active adults in employment as shown in Table 3.3, compared with the national average. However, B&NES also has a higher proportion of students. The unemployment rate is less than half the UK average in 2001.

Table 3.3: Economic Activity 2001

Status	% People aged 16-74		
	B&NES	South West	UK Average
Employed	62.0	62.4	59.6
Unemployed	2.0	2.6	4.4
Looking after home/family	5.4	6.1	6.4
Students	10.8	6.5	7.2
Retired	14.4	15.5	13.4
Other inactive	2.1	2.5	8.9

Sources: 2001 Census of Population

3.13 The age structure in B&NES is similar to both the Regional and UK averages. B&NES has a slightly lower proportion of children aged 0-14, but the proportion of young adults aged 15-29 is slightly higher than the south west and national averages, as shown in Table 3.4. The proportion of adults over 75 is comparable with the south west average but significantly lower than the national average.

Table 3.4: Age Structure 2001

Status	% of Population 2001		
	B&NES	South West	UK Average
Children 0-14	17.1	17.8	18.9
Adults 15 to 29	19.5	17.0	18.8
Adults 30 to 44	21.1	21.3	22.6
Adults 45 to 59	19.5	19.9	19.0
Adults 60 to 74	13.8	14.7	13.0
Adults 75 +	2.4	2.5	7.4

Sources: 2001 Census of Population

3.14 This socio-economic analysis indicates there are some differences between the profile of residents in B&NES and the UK as a whole. B&NES has higher levels of car ownership, lower unemployment and a higher portion of students. These characteristics suggest that many households in B&NES are relatively affluent and are mobile. However, other households may be less affluent without access to a car e.g. students and retired people. These households may not have the ability to choose between competing retail centres and will not be able to travel to all shopping destinations.

4.0 TOWN CENTRE VISITORS SURVEY

Survey Structure

4.1 As part of the study, street surveys of visitors within the four main shopping centres, of Bath, Keynsham, Radstock and Midsomer Norton shopping centres were undertaken by NEMS. 550 interviews were completed within Bath City Centre and 250 were conducted in each centre in Midsomer Norton, Radstock and Keynsham. A copy of the questionnaire is shown in Appendix F.

Table 4.1: Survey Structure

Centre	Number of interviews	Day of Survey
Bath	550	Monday Tuesday Wednesday Thursday Friday Saturday
Keynsham	250	Thursday Friday Saturday Tuesday
Midsomer Norton	250	Thursday Friday Saturday
Radstock	250	Monday Wednesday Thursday

4.2 The results of the surveys are summarised in this section. The respondents were asked to give information or opinions on:

- the purpose of their visit;
- what they intended to buy;
- how much they intended to spend;
- if they intended to visit any leisure/entertainment facilities;
- how they travelled to the centre;
- where they parked in the centre;
- which other shopping destinations they visit regularly;
- how long they intended to stay in the centre;

- the main factors they liked and disliked about the centre;
- if they visit the centre in the evenings; and
- the main factors they liked and disliked about leisure/pubs and bars/restaurants in the centre.

Main Purpose for Visit to Each Centre

4.3 Respondents were asked for the main reason for their visit to the town/city centre. The results are shown in Table 4.2. In each of the four centres, the main reason for visiting was *shopping*. At least 53% of respondents were shopping visitors in all four centres. Keynsham had the highest proportion of shoppers (67% of visitors). In the 2000 visitor survey, Midsomer Norton had the highest proportion of shoppers.

4.4 Bath was the most important of the centres for work or business purposes, with 16.5% of respondents indicating it was the main purpose of their visit. Work/business related visitors were less significant in the other towns. However, Midsomer Norton and Keynsham attracted a higher proportion of visitors for other services such as banks, hairdressers and travel agents. Almost 10% of respondents in Bath indicated that they intended to visit tourist attractions in the City. This is a 100% increase from the 5% who indicated this as their main purpose in 2000. Tourism was insignificant in the other towns.

Table 4.2: Main Purpose of Visit

Reason for Visit	Bath	Keynsham	Midsomer	Radstock
	%	%	%	%
Shopping	53.3	67.2	52.8	59.2
Work/business purpose	16.5	10	5.6	9.6
Services, e.g. banks, travel agents, hairdressers	8.4	26.4	30.4	13.6
Social/leisure reasons	7.1	5.6	9.2	8.8
Healthcare	3.1	5.2	6.8	7.2
Tourism/Sight seeing	9.8	0	0	0
Other	13.8	8.0	15.2	7.6

Source: NEMS Street Survey 2004

N.B. The figures add up to more than 100% as some respondents gave more than one answer.

4.5 Food shopping was the main activity undertaken by shopping visitors to Radstock and Midsomer Norton, as shown in Table 4.3. Non-food shopping was the main activity in Bath, whilst Keynsham was more evenly split between food and non-food shopping.

Table 4.3: Shopping Visitors

Reason for Visit	Bath		Keynsham		Midsomer		Radstock	
	Count	%	Count	%	Count	%	Count	%
Non-Food only	175	59.7	48	28.9	44	33.3	24	16.2
Food and Non-food	85	29.0	56	33.7	28	21.2	19	12.8
Food only	33	11.3	62	37.4	60	45.5	105	71.0
Total	**293**	**100**	**166**	**100**	**132**	**100**	**148**	**100**

Source: NEMS Street Survey 2004

Intended Visitor Purchases

4.6 Of those respondents who intended to purchase goods during their visit, 58.2% intended to buy food and grocery items. This figure was highest in Radstock (82.2%) and lowest in Bath City Centre (37.2%), as shown in Table 4.4.

Table 4.4: Intended Purchases

Reason for Visit	Bath	Keynsham	Midsomer	Radstock
	%	%	%	%
Food and groceries	37.2	68.5	70.1	82.2
Newspapers/magazines	3.2	13.0	12.2	6.3
Confectionary/tobacco	2.1	2.3	1.5	0.5
Clothing/footwear	40.9	11.1	4.1	4.2
Furniture/carpets/soft furnishings	1.8	0.5	1.0	0.5
Domestic electrical goods	1.6	0.0	1.5	0.0
Other electrical goods	2.5	1.4	0.5	0.0
DIY/hardware/gardening	1.2	4.2	1.5	2.1
Other household goods	6.2	5.1	3.6	3.7
Gifts/jewellery/china/glass	13.4	13.0	13.7	2.1
Books/CD's/videos/toys/ hobbies	10.4	3.7	4.6	1.0
Health/beauty/chemist items	11.3	13.4	6.1	4.2
Other	3.9	9.3	5.6	1.6
Don't know	3.7	0.9	2.0	5.8

Source: NEMS Street Survey 2004

N.B. The figures add up to more than 100% because some respondents gave more than one answer.

4.7 In Bath City Centre, clothing and footwear was the main intended purchase followed by food and groceries. The proportion of visitors intending to buy clothing and footwear was lowest in Midsomer Norton and Radstock (4.1% and 4.2% respectively). In Bath City Centre, Keynsham and Midsomer Norton a significant proportion of respondents stated gifts, jewellery, china and glass as their main intended purchase.

Expenditure During Visit

4.8 Visitors were asked to estimate how much they would spend on different items during their visit, as shown in Table 4.5. The highest average spend per visitor was achieved in Bath (£47.97). This is over £10 more than the average spend recorded in the 2000 visitor survey.

4.9 The average spend in Bath was nearly double the average of Keynsham (£24.04) and significantly higher than both Midsomer Norton and Radstock (between £15 and £17 per visitor). Food and grocery shopping accounted for the greater proportion of total expenditure within Midsomer Norton and Radstock, compared with 42% in Keynsham and 18% in Bath, demonstrating the dominance of food shopping in these two centres. The total average spend has increased in Keynsham since 2000. However in Midsomer Norton and Radstock the total average spend per visitor has decreased.

4.10 Over 60% of visitors in Bath intended to spend less than £10.00 on food and grocery items, producing a low overall average spend per visitor (£8.85). Less than 3% of visitors intended to spend more than £50 on food and grocery, which suggests that the City Centre attracts a very small proportion of bulk food shopping trips.

4.11 Over 75% of visitors in Keynsham, Radstock and Midsomer Norton intended to purchase food and grocery goods. However, the average spend on such goods in these centres is comparatively low. Whilst the average spend on food and grocery items in Bath and Keynsham increased from 2000, the average spend on these items in Midsomer Norton and Radstock has decreased by 26% and 20% respectively.

4.12 This is particularly concerning for Radstock where 71% of respondents are visiting Radstock for food items only at an average frequency of 2.3 visits per week. Moreover, Radstock has suffered from a drop in average visitor spend on non-food items, falling from £6.10 in 2000 to £3.93 in 2004. This has contributed to an overall drop in total visitor spending form £21.30 in 2000 to £15.65 in 2004, a 27% decrease.

Table 4.5: Expenditure in Centre

Approx. Spend	Bath		Keynsham		Midsomer		Radstock	
	Count	%	Count	%	Count	%	Count	%
Food & Groceries								
Nothing	188	43.4	49	22.7	49	24.9	26	13.6
Less than £5.00	28	6.5	41	19.0	42	21.3	40	20.9
£5.01 - £10.00	51	11.8	48	22.2	44	22.3	44	23.0
£10.01 – £20.00	33	7.6	30	13.9	27	13.7	42	22.0
£20.01 - £30.00	22	5.1	10	4.6	10	5.1	12	6.3
£30.01 - £40.00	6	1.4	8	3.7	7	3.6	7	3.7
£40.01 - £50.00	9	2.1	6	2.8	7	3.6	2	1.0
£50.01 - £75.00	5	1.2	3	1.4	4	2.0	2	1.0
£75.01 - £100.00	2	0.5	1	0.5	0	0	2	1.0
More than £100	4	0.9	0	0	0	0	0	0
Refused/DK	85	19.6	20	9.3	7	3.6	14	7.3
Average Per Visitor (2000 figure)	**£8.85** (£6.30)		**£10.14** (£8.10)		**£10.00** (£13.60)		**£11.21** (£14.10)	
Non-Food								
Nothing	45	10.4	55	25.5	91	46.2	92	48.2
Less than £5.00	25	5.8	43	19.9	39	19.8	27	14.1
£5.01 - £10.00	44	10.2	25	11.6	26	13.2	11	5.8
£10.01 – £20.00	39	9.0	36	16.7	18	9.1	9	4.7
£20.01 - £30.00	38	8.8	11	5.1	6	3.0	3	1.6
£30.01 - £40.00	54	12.5	9	4.2	1	0.5	0	0
£40.01 - £50.00	48	11.1	3	1.4	0	0	2	1
£50.01 - £75.00	14	3.2	2	0.9	1	0.5	0	0
£75.01 - £100.00	28	6.5	1	0.5	1	0.5	0	0
More than £100	30	7.0	5	2.4	2	1.1	1	0.5
Refused/DK	68	15.7	26	12.0	12	6.1	46	24.1
Average Per Visitor (2000 figure)	**£34.97** (£24.90)		**£12.46** (£7.80)		**£6.12** (£5.70)		**£3.93** (£6.10)	
Eating/Drinking Out								
Nothing	193	44.6	138	63.9	165	83.8	128	67.0
Less than £5.00	76	17.6	22	10.2	14	7.1	19	9.9
£5.01 - £10.00	50	11.5	4	1.9	5	2.5	4	2.1
£10.01 – £20.00	28	6.5	2	0.9	0	0	0	0
£20.01 - £30.00	8	1.8	0	0	1	0.5	0	0
£30.01 - £40.00	1	0.2	0	0	0	0	0	0
£40.01 - £50.00	2	0.5	0	0	0	0	0	0
£50.01 - £75.00	2	0.5	0	0	0	0	0	0
£75.01 - £100.00	1	0.2	0	0	0	0	0	0
More than £100	0	0	0	0	0	0	0	0
Refused/DK	72	16.6	50	23.1	12	6.1	40	20.9
Average Per Visitor (2000 figure)	**£4.15** (£4.30)		**£1.44** (£1.10)		**£0.53** (£0.20)		**£0.51** (£1.10)	
Total Average	**£47.97** (£35.50)		**£24.04** (£17.00)		**£16.65** (£19.50)		**£15.65** (£21.30)	

Source: NEMS Street Survey 2004

4.13 Midsomer Norton has also experienced a reduction in total visitor spending from £19.50 in 2000 to £16.65 in 2004, a 15% decrease, although expenditure on non-food items did rise by 7%.

4.14 Keynsham and Bath, on the other hand, experienced total average visitor expenditure growth over the same four year period. In Bath there is a 35% increase from £35.50 to £47.97. In Keynsham there is a 41% rise from £17.00 to £24.04, with increases in both food and non-food expenditure.

Mode of Travel

4.15 Most visitors to Keynsham, Midsomer Norton and Radstock travelled by car as shown in Table 4.6. A relatively high proportion (approximately 30%) of respondents in Keynsham and Midsomer Norton walked to the centres. Whilst this variable will be influenced by the weather, it does provide a comparative value to those respondents in Radstock which had a relatively low proportion of walkers on the same days in view of its more dispersed catchment. Although Radstock consequently has the highest proportion of car travellers to the four centres, the proportion has fallen to 67% from 76% in 2000 and this directly corresponds to a proportional rise in public transport users in Radstock.

4.16 In Bath, as many people travelled to the City Centre by public transport as by car. The proportion of respondents who used the Park and Ride facilities in Bath has fallen from 6% in 2000 to 4% in 2004. However the proportion of respondents using public transport in Bath has risen from 27% to 36% over the same period.

Table 4.6: Mode of Travel

Mode	Bath	Keynsham	Midsomer	Radstock
	%	%	%	%
Car/Van (driver)	28.9	48.0	51.6	57.2
Car/Van (passenger)	6.5	9.6	8.0	10.0
Bus	27.6	8.8	9.6	10.8
Walk	22.5	30.4	29.2	17.5
Train	8.2	0.4	0	0
Park and Ride	4.0	0	0	0
Other	2.3	2.8	1.6	2.5
Total	**100**	**100**	**100**	**100**

Source: NEMS Street Survey 2004

Car Parking

4.17 In Bath over 40 different parking locations were mentioned by respondents. The most popular car parks are shown in Table 4.7. After the Park and Ride car parks, Ham Gardens and The Podium appear to be the most popular, with 14% and 10% of car borne visitors respectively. In the other towns, fewer parking locations were mentioned.

Table 4.7: Car Parking in Bath

Location	Car Visitors	
	Count	**%**
The Podium/Waitrose Car Park	16	10.1
Avon Street	11	6.9
Sainsbury Car Park	5	3.2
Charlotte Street	11	6.9
Hams Gardens	22	13.8
Park and Ride car parks	23	14.5
Railway Station	1	0.6
Other locations	59	37.1
Don't know	11	6.9
Total	**159**	**100**

Source: NEMS Street Survey 2004

4.18 In Keynsham, the Ashton Way car park was the most popular car park (43%). A fifth of respondents parked in 'other' locations.

Table 4.8: Car Parking in Keynsham

Location	Car Visitors	
	Count	**%**
Ashton Way	52	43.3
St John's Court/Carlton Road	10	8.3
The Civic Centre	11	9.2
On street parking	10	8.3
Other	24	20.0
Don't know	13	10.8
Total	**120**	**100**

Source: NEMS Street Survey 2004

4.19 In Midsomer Norton, South Road was the most popular place to park (34.1%). A significant proportion also parked in The Hollies/Safeway and the High Street (26.4% and 20.9% respectively).

Table 4.9: Car Parking in Midsomer Norton

Location	Car Visitors	
	Count	**%**
The Hollies/Safeway	34	26.4
High Street	27	20.9
South Road	44	34.1
On Street	10	7.8
Other/Don't know	14	10.8
Total	**129**	**100**

Source: NEMS Street Survey 2004

4.20 In Radstock, over half of those interviewed parked in the Radco car park (64.3%). Over 12% of respondents parked in other locations.

Table 4.10: Car Parking in Radstock

Location	Car Visitors	
	Count	%
Radco car park	92	64.3
Victoria Hall	8	5.6
The Street/Fortesque Road	2	1.4
Library	7	4.9
The Bakery/Waterloo Road	3	2.1
On Street	9	6.3
Don't know	4	2.8
Other	18	12.6
Total	**143**	**100**

Source: NEMS Street Survey 2004

Frequency of Shopping Trips

4.21 Respondents were asked how frequently they shopped in the centre, as shown in Table 4.11. The majority of respondents visit the centres at least once a week. Over 82% visit Keynsham, and Midsomer Norton regularly (once a week or more), compared with 71% in Radstock. In Bath, the proportion of regular visitors had fallen 3% from 2000 to 57% whilst the proportion of occasional visitors (those visiting once a month or less) rose from 29% to 34%. This indicates that the range of shops and services available in the City centre are perhaps becoming more specialist and catering less for everyday needs and / or that the centre is becoming more popular for destination shopping.

Table 4.11: Frequency of Shopping Trips

Frequency of visit	Bath		Keynsham		Midsomer		Radstock	
	Count	%	Count	%	Count	%	Count	%
Every day	71	12.9	76	30.4	50	20.0	50	20.0
2-3 times a week	132	24.0	92	36.8	99	39.6	73	29.2
Once a week	110	20.0	49	19.6	56	22.4	54	21.6
Once a fortnight	44	8.0	12	4.8	20	8.0	15	6.0
Once a month	54	9.8	10	4.0	10	4.0	18	7.2
Less than once a month	98	17.8	10	4.0	9	3.6	27	10.8
Never	35	6.3	1	0.4	5	2.0	11	4.4
Don't Know	6	1.1	0	0	1	0.4	2	0.8
Average Frequency	1.7 per week		3.2 per week		2.6 per week		2.3 per week	
Total	**550**	**100**	**250**	**100**	**250**	**100**	**250**	**100**

Source: NEMS Street Survey 2004

Duration of Visit

4.22 Table 4.12 shows the amount of time visitors intended to spend in the four centres. There is a noticeable difference between Bath and the other three centres. The average length of stay in Bath (1.75 hours) is at least double the length of stay in the other centres. The majority of visitors to Keynsham, Midsomer Norton and Radstock spent less than 1 hour. The average length of stay in Bath may be affected by those who park in the city centre for work purposes, i.e. long term carparking, but will include a greater duration of stay in view of the larger number of shops and the range of tourist and leisure facilities.

Table 4.12: Duration of Visit

Time spent	Bath		Keynsham		Midsomer		Radstock	
	Count	**%**	**Count**	**%**	**Count**	**%**	**Count**	**%**
0 - 15 minutes	23	4.2	32	12.8	23	9.2	58	23.2
16 - 30 minutes	34	6.2	59	23.6	65	26.0	60	24.0
31 mins – 1 hours	76	13.8	82	32.8	89	35.6	69	27.6
1 – 1.5 hours	90	16.4	30	12.0	28	11.2	23	9.2
1.5 – 2 hours	102	18.5	31	12.4	26	10.4	19	7.6
2 – 3 hours	119	21.6	8	3.2	8	3.2	7	2.8
Over 3 hours	98	17.8	6	2.4	11	4.4	9	3.6
Refused/don't know	8	1.5	2	0.8	0	0	5	2.0
Average Duration	1 hour 45 mins		45 mins		50 mins		35 mins	
Total	**550**	**100**	**250**	**100**	**250**	**100**	**250**	**100**

Source: NEMS Street Survey 2004

Other Centres Visited

4.23 Respondents were asked about the other centres they use regularly for shopping. A high proportion of respondents in the three smaller centres regularly use Bath e.g. 49% and 44% in Midsomer Norton and Radstock respectively. More visitors in Keynsham also go to Bristol (including Cribbs Causeway) (43%), compared with 34% also going to Bath. In Bath, 39% of respondents regularly also use shops in Bristol and Cribbs Causeway and 13% also regularly use shops in Trowbridge. Bristol attracts customers from across B&NES but Bath appears to be the main comparison shopping destination for the Norton Radstock area.

4.24 Respondents in Keynsham also regularly visit Bristol (35.2%) and Bath (33.6%). The figures are broadly similar, reflecting the fact that Keynsham is an equal distance from both centres. It does demonstrate that shoppers are prepared to travel to either centre and that there is retail expenditure flowing from Keynsham which could be captured by Bath rather than Bristol if a comparable range of goods were available.

Reason for Choosing Each Centre

4.25 Survey respondents were asked what was the main reason for choosing to shop in the centre visited, rather than some other town or centre in the area. The results are shown in Table 4.13. The main reason in the three smaller centres was the proximity of the centre to respondents' home or general ease to visit. However, the quality and range of shopping was the most popular reason given by respondents in Bath at 42%; this is a significant increase from the 10% who gave quality and range as a reason in 2000.

Table 4.13: Reason for Choosing Each Centre

Reason	Bath	Keynsham	Midsomer	Radstock
	%	%	%	%
Nothing in particular	21.6	15.6	15.2	28.0
Specialist shops	6.7	2.8	3.6	0.4
Close to home/easy to get to	28.9	60.4	40.8	47.2
Availability of parking	1.1	7.6	15.2	6.0
Good quality/range of shops	41.8	26.0	24.0	5.6
Cheap car park	0	9.2	6.8	3.6
Attractive environment	13.1	0	10.0	1.2
General atmosphere	19.5	12	13.6	5.2
Other	10.9	13.2	14.0	15.6

Source: NEMS Street Survey 2004

N.B. Figures add to more than 100% because more than one centre was mentioned by some respondents.

Visitor Perceptions

4.26 Respondents were asked what they disliked about the four centres. The key dislikes are summarised in Tables 4.14 to 4.17.

Table 4.14: Bath Visitor Dislikes

Main Dislikes	Visitors	
	Count	%
Nothing in particular	181	32.9
Traffic congestion	47	8.5
Cost of parking	62	11.3
Anti social behaviour	48	8.7
Litter	61	11.1
Lack of parking	45	8.2
Other	96	17.5
Poor choice of shops	51	9.3
Lack of specialist shops	29	5.3

Source: NEMS Street Survey 2004

N.B. Figures add to more than 100% because more than one centre was mentioned by some respondents.

4.27 Around 67% of visitors in Bath suggested that there was something they disliked about the centre, compared with 60% or less in the other three towns. Within Bath, the cost of parking and amount of litter were the main factors disliked by visitors (11.3% and 11.7% respectively). This was closely followed by the poor choice of shops available (9.3%). Some respondents indicated that they were dissatisfied with the amount of traffic congestion (8.5%); the level of anti-social behaviour also figured highly on the main dislikes indicated (8.7%).

4.28 In Keynsham, the poor choice of shops was the main factor disliked by visitors, although more than double the number of respondents indicated there was nothing in particular they disliked about the centre. Traffic congestion was also mentioned by 8.4% of respondents, which shows a slight improvement from 2000 when 10% of visitors cited congestion as a dislike factor of the centre.

Table 4.15: Keynsham Visitor Dislikes

Main Dislikes	Visitors	
	Count	%
Nothing in particular	95	38.0
Lack of specialist shops	13	5.2
Poor choice of shops	45	18.0
Poor quality shops	9	3.6
Lack of large shops	8	3.2
Traffic congestion	21	8.4
Litter	9	3.6
Lack of Parking	8	3.2
Cost of parking	7	2.8
Other	63	25.2

Source: NEMS Street Survey 2004
N.B. Figures add to more than 100% because more than one centre was mentioned by some respondents.

4.29 The choice of shops was also the main issue in Midsomer Norton, with the lack of large shops mentioned by 15% of visitors. However, 37% of visitors said that there was nothing they disliked about the centre.

Table 4.16: Midsomer Norton Visitor Dislikes

Main Dislikes	Visitors	
	Count	%
Nothing in particular	91	36.4
Poor choice of shops	86	34.4
Litter	6	2.4
Traffic congestion	2	0.8
Lack of specialist shops	19	7.6
Lack of large shops	38	15.2
Lack of parking	5	2.0
Other	40	16.0

Source: NEMS Street Survey 2004
N.B. Figures add to more than 100% because more than one centre was mentioned by some respondents.

4.30 44% of the respondents in Radstock indicated that there was nothing they disliked about the centre, the highest level of *satisfaction* recorded in the four centres. The poor choice of shops and services and traffic congestion were the main factors disliked by visitors.

Table 4.17: Radstock Visitor Dislikes

Main Dislikes	Visitors	
	Count	%
Nothing in particular	109	43.6
Poor choice of shops and services	62	24.8
Traffic congestion	37	14.8
Poor quality shops	11	4.4
Lack of large shops	10	4.0
Lack of specialist shops	12	4.8
Lack of parking	7	2.8
Other	26	10.4

Source: NEMS Street Survey 2004
N.B. Figures add to more than 100% because more than one centre was mentioned by some respondents.

Visitor Profile

4.31 The socio economic profile and car ownership details of visitors interviewed in each centre are shown in table 4.18. Bath attracts the highest proportion of visitors within the most affluent social economic groups (i.e. A, B, C1) and Midsomer Norton has the highest proportion of car owning visitors in comparison with the other three centres. However in proportional terms, Midsomer Norton attracts a lower proportion of A and B category visitors (professional managerial) compared to Bath, Keynsham and Radstock. The highest proportion of Radstock's visitors is in the C2 category (semi-skilled manual).

4.32 In the four centres, on average over 75% of visitors own one or more cars. A significant proportion of households in Bath City Centre had no car, 26.9%.

Table 4.18: Socio Economic Characteristics

Characteristics	% of visitors Bath City Centre	Keynsham	Midsomer Norton	Radstock
Occupation of Chief Wage Earner				
AB	27.5	20.8	12.4	14.4
C1	34.5	30.4	26.4	20.8
C2	16.7	22.4	27.2	35.2
DE	19.1	26.0	31.6	28.0
Refused	2.2	0.4	2.4	1.6
Number of Cars per Household				
None	26.9	18.4	14.4	20.0
1	39.3	46.4	42.4	49.6
2	25.1	26.8	32.8	24.8
3 or more	8.7	8.4	10.4	5.6

Source: NEMS Street Survey 2004

5.0 HOUSEHOLD SURVEY

Survey Structure

5.1 NEMS Market Research carried out a telephone survey of 703 households in the study area between 22nd March and 4th April 2004. The survey results are shown in Appendix G and summarised in this section. For the survey, the study area was split into eight zones based on postcode boundaries. These were:

- Zone 1 City of Bath;
- Zone 2 Keynsham/Saltford;
- Zone 3 Norton/Radstock;
- Zone 4 North of Bath (Rural);
- Zone 5 South of Bath (Rural);
- Zone 6 Chew Valley;
- Zone 7 Frome and South of Norton/Radstock; and
- Zone 8 East of Bath (incl. Bradford).

5.2 The previous 2000 Study undertook a similar household survey (1,019 interviews within 12 zones). The 2004 survey is based on the same zones adopted for the 2000 survey, although the latest survey excludes four peripheral zones outside the B&NES administrative boundary, because the 2000 survey results indicated that the market shares of expenditure attracted from these zones to B&NES were relatively low. The excluded zones are:

- Zone 9 West Wiltshire;
- Zone 10 Chippenham;
- Zone 11 Longwell Green/Willsbridge/Oldland; and
- Zone 12 Hengrove and Whitchurch.

5.3 The remaining zones (1-8) reflect the extent of the primary catchment areas of the main shopping centres in Bath and North East Somerset. However, the excluded zones are included within the retail capacity later in this report.

5.4 At least 250 interviews have been undertaken within the Bath city centre sector and over 40 in each of the other sectors to provide statistically reliable sub-samples. The main aims of the survey were to establish patterns for the following:

- Main food and grocery shopping;
- Top-up food and grocery shopping; and
- Non-food shopping, including:
  - clothing and footwear;
  - domestic electrical appliances;
  - other electrical goods (TV, Hi-FI and computers)

- furniture, soft furnishing or carpets;
- DIY/garden items and hardware;
- health and beauty items; and
- Other non-food items

5.5 Households were selected to ensure that a representative sample was obtained. Interviews were conducted with the person responsible for the majority of food shopping within each household.

Food and Grocery Shopping

Main Food Shopping

5.6 The residents in the study area do most of their household's main food and grocery shopping at large food stores close to their home, as shown in Table 5.1.

Table 5.1 Main Food Shopping Destinations

Zone	Primary Main Food Shopping Destinations
Zone 1 City of Bath	Sainsbury, Bath (42.1%) Safeway, Bath (17.1%) Waitrose, Bath (12.7%) Asda, Longwell Green (10.3%)
Zone 2 Keynsham/Saltford	Asda, Longwell Green (41.4%) Tesco, Brislington (18.6%) Somerfield, Keynsham (17.1%) Local Shops (5.7%)
Zone 3 Norton/Radstock	Tesco, Paulton/Midsomer Norton (72.6%) Safeway, Midsomer Norton (13.7%)
Zone 4 North of Bath (Rural)	Sainsbury, Chippenham (27.1%) Waitrose, Bath (14.6%) Safeway, Bath (12.5%) Asda, Longwell Green (10.4%)
Zone 5 South of Bath (Rural)	Sainsbury, Bath (31%) Tesco, Paulton/Midsomer Norton (26.2%) Asda, Longwell Green (9.5%)
Zone 6 Chew Valley	Tesco, Paulton/Midsomer Norton (28.3%) Co-op, Chew Magna (15.2%) Asda, Whitchurch (13%) Tesco, Brislington (13%) Sainsbury, Bristol (10.9%)
Zone 7 Frome and South of Norton/Radstock	Sainsbury, Frome (51.9%) Safeway, Frome (17.9%) Asda, Trowbridge (9.4%)
Zone 8 East of Bath (incl. Bradford)	Tesco, Trowbridge (53%) Asda, Trowbridge (31.8%) Budgens, Bradford on Avon (4.5%)

Source: NEMS Household Survey 2004

5.7 In Zone 1, City of Bath, a significant proportion of main food shopping is undertaken at Sainsbury's, Safeway and Waitrose within or close to Bath City Centre. Nearly 63% of households across the study area indicated that they undertake small-scale or top-up shopping trips in addition to their main food shopping trips. These top up trips are also undertaken primarily at local shops (41.1%). Other top up shopping is undertaken at larger food stores throughout B&NES.

Frequency of Main Food and Grocery shopping

5.8 Table 5.2 shows the frequency of main food and grocery shopping trips. Across the study area, a significant proportion of respondents undertake a main food and grocery trip once a week (68.9%). Only a small proportion of respondents undertook their main food shopping trips once a fortnight or less (13.4%). The proportion of respondents undertaking a main food and grocery shop more than once a week is higher in Zone 3: Norton/Radstock than across the rest of the study area.

Table 5.2 Frequency of main food and grocery shopping

Frequency	% of Total Respondents
More than once a week	17.4
Once a week	68.9
Once a fortnight	10.5
Once a month	2.9
Less Often	0.0
Don't know	0.4
Total	**100.0**

Source: NEMS Household Survey 2004

Mode of Travel and Origin of Trips

5.9 Table 5.3 shows the modes of travel used when undertaking main food shopping trips. The car is the preferred method of transportation across the study area (78.4%), although the proportion of households shopping by car is higher in zones 3 and 5, Norton/Radstock and South of Bath (Rural) areas (at around 90% to 93%). A reasonably significant proportion of households walk to their main food shopping destinations, especially in the City of Bath (12.7%).

Table 5.3 Mode of Travel to Main Food Shopping Destinations

Mode	% of Total Respondents
Car – Driver	78.4
Car – Passenger	7.4
Bus/Coach	4.1
Train	0.0
Taxi	0.7
Walk	7.7
Bicycle	0.0
Other	0.0
Goods delivered	1.7
Total	**100.0**

Source: NEMS Household Survey 2004

Non-Food Shopping

5.10 Households were asked in which town or centre they buy most of their household's non-food shopping. The main towns and centres are shown in Table 5.4.

Table 5.4 Household Non-food shopping destinations

Zone	Non-Food Shopping Destinations
Zone 1 City of Bath	Bath (90.9%) Bristol (3.2%) Other (1.6%)
Zone 2 Keynsham/Saltford	Bristol (41.4%) Bath (28.6%) Keynsham (12.9%) Longwell Green (7.1%)
Zone 3 Norton/Radstock	Bath (64.4%) Midsomer Norton (21.9%) Trowbridge (4.1%) Other (4.1%)
Zone 4 North of Bath (Rural)	Bath (72.9%) Chippenham (16.7%) Bristol (4.2%)
Zone 5 South of Bath (Rural)	Bath (83.3%) Longwell Green (4.8%) Midsomer Norton (4.8%)
Zone 6 Chew Valley	Bristol (45.7%) Bath (30.4%) Other (10.9%) Cribbs Causeway/The Mall (6.5%)
Zone 7 Frome and South of Norton/Radstock	Frome (43.5%) Bath (29.2%) Trowbridge (20.8%)
Zone 8 East of Bath (incl. Bradford)	Trowbridge (57.6%) Bath (33.3%) Other (4.5%)

Source: NEMS Household Survey 2004

5.11 It should be noted that this type of question tends to overstate the role of the major higher order centres and understate the role of the lower order centres. Bath City Centre attracts customers from across the study area. Bristol is the main non food shopping destination for Zones 2 and 6 (Keynsham/Saltford and Chew Valley) to the west of B&NES. Trowbridge is the main non-food shopping destination for the East of Bath (Zone 8) and Frome is the main destination for households to the south of B&NES (Zone 7 – Frome and South of Norton/Radstock).

5.12 Table 5.5 shows the modes of travel used when undertaking non-food shopping. The car is the preferred method of transportation for non-food shopping but a lower proportion travel by car for non-food shopping than for food shopping. Conversely a higher proportion travel by bus/coach for non-food shopping.

Table 5.5 Mode of Travel to Non Food Shopping Destinations

Mode	**% of Total Respondents**
Car – Driver	66.4
Car – Passenger	8.11
Bus/Coach	11.4
Train/	0.4
Taxi	0.3
Walk	11.8
Bicycle	0.4
Other	0.3
Goods Delivered	0.9
Total	**100.0**

Source: NEMS Household Survey 2004

5.13 Households were asked where they normally go to shop for different types of non-food goods. The main shopping destinations for each type of non-food goods are shown in Table 5.6. The survey results indicate that households shop at a large number of shopping destinations for different types of goods, both within the study area and outside. Bath is the most popular destination for all types of non-food goods. Bristol, Trowbridge and Frome are also popular destinations for a wide range of goods.

Table 5.6 Non-Food Shopping Destinations by Type of Goods

Type of Goods	% of Households in the Study Area
Clothes and shoes	Bath (66.3%) Bristol (10.4%) Trowbridge (6.7%) Internet/Mail Order (2.6%) Cribbs Causeway/The Mall (2.3%)
Domestic electrical appliances	Bath (39.7%) Trowbridge (11.7%) Don't regularly buy these kinds of goods (9.8%) Bristol (7.7%) Longwell Green (6.5%)
TV/Hi-Fi and computers	Bath (41.4%) Don't regularly buy these kinds of goods (11.4%) Trowbridge (11.0%) Bristol (6.8%) Longwell Green (6.1%)
Furniture, floor coverings	Bath (33.4%) Don't regularly buy these kinds of goods (19.4%) Bristol (12.2%) Trowbridge (9.7%)
DIY/hardware	Bath (33.4%) Trowbridge (12.0%) Longwell Green (10.1%) Don't regularly buy these kinds of goods (9.8%) Frome (9.7%) Midsomer Norton (8.4%)
Health/Beauty and Chemists	None mentioned/no other centre (82.5%) Bath (6.6%) Bristol (2.5%) Trowbridge (2.1%)
Other non-food goods (CD's/Toys and Gifts)	Bath (47.4%) Don't regularly buy these kinds of goods (11.1%) Frome (8.3%) Trowbridge (7.7%) Bristol (6.1%) Internet/Mail Order (5.6%)

Source: NEMS Household Survey 2004

Factors that would make households shop at the centres more often

5.14 Respondents were asked what would make them shop for food or non-food goods more often in the city centre and three town centres in Bath and North East Somerset. The main reasons are shown in Table 5.7.

5.15 A significant proportion of households across the study area considered that there was nothing that would make them shop in the four centres more often, especially in Midsomer Norton and Radstock (72.3% and 74.8% respectively). In Bath City Centre, cheaper parking, more car parking and better choice of clothing shops were the main factors that would make households shop in the centre more often. For

Keynsham, Midsomer Norton and Radstock there were no significant factors that would make households shop in the centres more often.

Table 5.7 Factors that would attract more shoppers to the centres

Reason	% of Total Respondents			
	Bath City Centre	Keynsham Town Centre	Midsomer Norton Town Centre	Radstock Town Centre
Nothing	45.8	69.8	72.3	74.8
Better choice of clothing shops	8.3	6.0	4.8	2.3
Better/more food stores	4.8	5.7	1.7	1.4
Better quality shops	6.3	5.1	3.7	2.1
Cheaper car parking	19.4	1.4	0.4	0.7
Improved Bus services	7.3	1.4	0.7	0.7
Less traffic congestion	4.0	0.0	0.3	0.6
More car parking	15.1	1.6	0.7	1.1
More large shops	4.8	2.1	2.0	1.0
More retail warehouses	1.1	0.4	0.3	0.0
More pedestrianised areas	2.0	0.4	0.1	0.4
Other	4.4	4.1	2.7	1.1
Don’t know	5.1	13.8	15.7	17.5
More variety of shops	1.4	N/A	N/A	N/A
Cleaner streets	0.7	N/A	N/A	N/A
Cheaper shops	1.6	N/A	N/A	N/A

Source: NEMS Household Survey 2004

6.0 BATH CITY CENTRE

Mix of Uses and Occupier Representation

6.1 Bath City Centre is the main shopping and commercial centre in B&NES. It has a large number of retail and service uses. The centre serves shoppers across B&NES, particularly for comparison shopping. Its key roles include:

- *convenience shopping* - serving the local population, such as the Waitrose and Somerfield food stores, newsagents, specialist food shops;
- *comparison shopping* – a wide range of national multiples, supported by a wide range of specialist independent shops;
- *entertainment and leisure* - including cinemas, theatres, pubs, cafés and restaurants;
- *services* - including banks, estate agents, travel agents and hairdressers;
- *employment* - including offices and retail/service sector workers;
- *tourism* - including the Abbey, Roman Baths and Spa.

6.2 Bath City Centre has a total of 623 ground floor commercial premises. The total ground floor area of Bath's commercial premises is approximately 74,000 sq m gross, comparable with Swindon town centre but smaller than Bristol City Centre. Bath City Centre was ranked 28th in the UK based on the number of multiple retailers and anchor store strength. This was just below Bristol (23rd) Cheltenham (24th) and Cardiff (19th), but significantly higher than Swindon (47th) and Trowbridge (317th), source: MHE UK Shopping Index 2003/2004. Bath's rank has moved up marginally from 30th in 2000. Bath remains a relatively large regional shopping centre with a wide range of shops, as shown in Table 6.1.

Table 6.1: Bath City Centre Use Class Mix

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Bath City Centre	**GB Average***
Class A1 (Retail)	413	66.3	57.4
Class A1 (Services)	42	6.8	9.1
Class A2	38	6.1	8.9
Class A3	98	15.7	12.7
Miscellaneous	7	1.1	1.5
Vacant & Under Const.	25	4.0	10.5
Total	**623**	**100.0**	**100.0**

Sources: NLP Street Survey 2004 and Goad Plans.
** UK average relates to all town centres surveyed by Goad Plans (Nov 2003)*

6.3 Compared with UK averages Bath City Centre has a higher proportion of Class A1 retail units and a very low level of vacancy. The high proportion of Class A3 uses also reflects the importance of tourism and leisure. The proportion of services uses (Class A1 (Service) and A2) are slightly lower than the national average. The overall number of units decreased from 644 in 2000 to 623 in 2004 due to amalgamation of units and some double counting that occurred in the previous land use survey.

6.4 A breakdown of Class A1 retail units and floorspace is shown in Table 6.2. As a regional and sub-regional centre, Bath inevitably has a lower proportion of units and retail floorspace devoted to the sale of convenience goods. However, the Waitrose and Somerfield stores, together with the Marks and Spencer Food Hall, offer a reasonable range of goods suitable for both main food and top-up shopping. Specialist food shops widen the quality end of the food range.

Table 6.2: Bath Retail Trade Mix Comparative Analysis

Type of Unit	% Total A1 Units		% A1 Gross Floorspace	
	Bath	GB Average*	Bath	GB Average*
Convenience	12.1	16.2%	7.4 %	24.0%
Comparison	87.9	83.8%	92.6%	76.0%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Sources: NLP Street Survey 2004 and Goad Plans.
** UK average relates to all town centres surveyed by Goad Plans (Nov 2003)*

Retailer Representation

6.5 Bath City Centre has 363 comparison goods retailers (source: NLP Street Survey 2004). This number has remained relatively stable since 1995. A detailed breakdown of these comparison goods shop units is shown in Table 6.3. Whilst most national multiples are represented in the City, approximately half of retailers are small independents. The range of multiple and independent specialist traders provides a good balance of facilities and support the key anchor tenants of Marks & Spencer, BhS, Jollys and Boots.

6.6 Bath City Centre has a strong representation in most of the main comparison goods sectors. The centre has a relative concentration of clothing and fashion shops. Trade from tourism has led to a large number of gift and fancy goods shops. DIY/hardware shops and motor accessories are possible areas of *deficiency*. The City Centre also has an excellent range of service uses, particularly restaurants/bars and banks and financial services. As a result of this range of shops and services, the average length of stay is approximately 1.75 hours and the total average spend is £47.97 per visitor.

Table 6.3: Bath City Centre Breakdown of Comparison Units

Type of Unit	Bath City Centre		GB Average*	
	Units	%	Units	%
Clothing and Footwear	142	39.1	36	26.1
Furniture, carpets and textiles	22	6.1	13	9.7
Booksellers, arts, crafts and stationers	37	10.2	13	9.4
Electrical, gas, music and photography	42	11.6	15	10.8
DIY, hardware & homewares	10	2.8	9	6.3
China, glass, gifts & fancy goods	32	8.8	6	4.0
Cars, motorcycles & motor access.	0	0	4	3.0
Chemists, drug stores & opticians	24	6.6	11	7.8
Variety, department & catalogue	3	0.8	3	2.3
Florists, nurserymen & seedsmen	3	0.8	3	2.3
Toys, hobby, cycle & sport	11	3.0	8	5.6
Jewellers	26	7.2	6	4.7
Other comparison retailers	11	3.0	11	7.9
Total	**363**	**100%**	**138**	**100%**

Sources: NLP Street Survey 2004 and Goad Plans.
** UK average relates to all town centres surveyed by Goad Plans (Nov 2003)*

Service Uses

6.7 The City Centre has 178 service sector units, 28.5% of the total number of ground floor retail and service units, similar to the national average of 30.7%. A breakdown of these service uses is provided in Table 6.4. Again, Bath has a strong representation in all the key service categories. The number of service uses in Bath has decreased marginally from 184 in 1998 to 178 in 2004.

6.8 As a major centre and with tourist attractions, Bath has a high proportion of restaurants and cafés (Class A3 uses) when compared with the national average. The proportion of estate agents is much lower than the national average. The proportion of *local needs* services is lower than the national average, for example; hairdressers, dry cleaners and travel agents are slightly lower than average. However, the actual number of *local needs* services available offer a reasonable choice for local residents and employees.

Table 6.4: Bath City Centre Analysis of Selected Service Uses

Type of Use	Bath City Centre		GB Average*	
	Units	%	Units	%
Restaurants, cafes & takeaways	98	57.6	36	41.4
Banks & financial and other services	27	15.9	15	17.6
Estate agents and valuers	3	1.8	10	11.3
Travel agents	10	5.9	5	6.2
Hairdressers & beauty parlours	29	17.0	17	20.0
Laundries and dry cleaners	3	1.8	3	3.5
Total	**170**	**100.0**	**86**	**100.0**

Sources: NLP Street Survey 2004 and Goad Plans.
** UK average relates to all town centres surveyed by Goad Plans (Nov 2003)*

Leisure Uses

6.9 In some leisure sectors, Bath is very well represented. The City has a wide range of pubs and restaurants, responding to the strong tourist market.

6.10 There are seven gyms within the centre, as well as a local authority run leisure centre, although there is demand for operators for additional provision.

6.11 Bath is currently under represented in cinema provision, compared to Bristol and Swindon with just three small screen cinemas, although the Kingsmede 'leisure box' will improve the situation when it opens. There is one Bingo Hall in the city centre at Saw Close.

The Supply of Commercial Premises

6.12 As indicated earlier, the level of vacant units within Bath City Centre was less then half the national average at 4% compared with 10.5%. There were 25 vacant units in Bath in 2004. Most of these vacant units were small premises averaging only approximately 50 sq m and only 1 unit was over 100 sq m gross. At present most vacant units are in secondary areas or within the Southgate Centre, which is expected to be redeveloped. There are very few vacant units currently available for new occupiers within the primary shopping area.

The Quality of Premises

6.13 Many of the retail/service properties in Bath City Centre are historic buildings, typically small and not ideal for multiple retailers. Approximately 78% of units in Bath City Centre are small units of less than 93 sq m gross (1,000 sq ft), much higher than the national average of 41%. Conversely Bath has a much lower proportion of medium (93 sq m to 232 sq m, 1,000 to 2,500 sq ft) and large units (over 232 sq m, 2,500 sq ft). Table 6.5 shows the size of units is compared with the national average. Multiple retailers have increasingly sought larger units, such that many of the occupier requirements for space in Bath (as shown in Appendix D) are for units of over 232 sq m (2,500 sq ft). The low vacancy rate and limited supply of medium/large units appears to be the major obstacle to the attraction of new retailers to Bath and to the ability of existing retailers to provide their full offer.

Table 6.5: Bath City Centre Unit Size

Size of Unit – Gross Floorspace	Bath City Centre % of Units	GB Average % of Units
Under 1,000 sq ft (93 sq m)	77.8	41.2
1,000 to 2,499 sq ft (93 to 232 sq m)	15.6	42.0
2,500 to 4,999 sq ft (232 to 465 sq m)	4.1	10.7
5,000 to 9,999 sq ft (465 to 929 sq m)	1.0	3.5
10,000 sq ft plus (929 sq m)	1.5	2.6
Total	**100.0**	**100.0**

Sources: NLP Street Survey 2004 and Goad Plans.
** UK average relates to all town centres surveyed by Goad Plans (Nov 2003)*

6.14 The Southgate redevelopment is expected to improve the provision of medium to large retail premises available in Bath city centre. The proposed development is expected to include a large department store and a number of medium and large retail units.

Property Indicators

6.15 The current strength of commercial property indicators in Bath has been examined. Occupiers regard operational costs (rents, rates and service charge) as expenses required to enable them to carry out their business from a particular property. The amount they can afford to pay is effectively the residual after all other operating costs (including reasonable profit) have been deducted from total sales achieved. Therefore, growth or decline in rents, in any given location, should be reasonably correlated with occupiers' overall trading performance.

6.16 Retail rental levels in Bath have improved since the last recession, according to Valuation Office Information. Prime Zone A rental levels increased from £1,750 per sq m in 1999 to £2,500 per sq m in 2004 (+14%). Rental levels in good secondary areas showed a smaller increase from £900 to £925 per sq m (+3%).

6.17 Letting agents have confirmed that rents of up to £2,500 per sq m could be achieved in the prime area, and that the prime area is still located in the Union Street section of the shopping thoroughfare. Stall Street is slightly lower at £2,400 per sq m.

However, there have been few recent retail lettings within the primary area due to the shortage of available properties. Zone A rentals in other areas of the City Centre are as follows.

- Burton Street/Old Bond Street - £1,725;
- Milsom Street/New Bond Street - £1,675;
- Cheap Street - £1,075+;
- Upper Borough Walls - £850;
- George Street; - £600 to £645;
- Westgate Street - £800+.

Sources: King Sturge and Crisp Cowley

6.18 New Bond Street and Milson Street remain the highest off-prime areas, achieving Zone A rents of around £1,700 per sq m.

6.19 Current prime Zone A rental levels in Bath are slightly higher than those achieved in Bristol and comparable with those achieved in Oxford (as shown in Table 6.6). Cardiff is achieving slightly higher rental levels than Bath. Rental levels in Bath appear to be relatively buoyant in comparison with competing centres within the South West region.

Table 6.6: Annual Retail Zone A Rents (£ per sq m) 2004

	Zone A Rent (£ per Sq M)	
Area	**Prime Position (1)**	**Good Secondary (2)**
Bath City Centre	**£2,500**	**£1,250**
Bristol	£2,000	£925
Cardiff	£2,900	£675
Chester	£2,100	£1,500
Exeter	£2,000	£850
Oxford	£2,500	£1,500
Plymouth	£1,650	£900
Swindon	£1,900	£500
Gloucester	£1,400	£650

Source: Valuation Office (January 2004)

6.20 Commercial yields are a measure of property values which enables the values of properties of different size, location and characteristic to be compared. The level of yield broadly represents the market's evaluation of risk and return attached to the income stream of shop rents. Broadly speaking low yields indicate that a centre is considered to be attractive and, as a result, more likely to attract investment and rental growth than a centre with high yields.

6.21 Prime retail yields within Bath City Centre have remained around the 5% mark since

1994. Yields in the prime area range form 4.5% to 6%. Yields in good secondary areas range from 6% to 8%, whilst fringe areas are between 9% and 10%.

6.22 Prime retail yields in Bath are similar to those achieved in other regional and sub-regional centres in the South West as shown in Table 6.7.

Table 6.7: Retail Yields

Area	**Yield %**	
	1999	**2004**
Bath City Centre	**5.00**	**5.00**
Bristol (Broadmead)	5.00	5.00
Cardiff	5.00	4.50
Chester	4.75	5.50
Exeter	5.50	6.50
Oxford	4.50	4.00
Plymouth	5.00	6.50
Swindon	5.50	5.25
Cheltenham	6.00	6.00
Gloucester	6.75	7.00

Source: Valuation Office (January 2004)

Accessibility and Pedestrian Movement

Car Access and Parking

6.23 The survey of visitors in Bath City Centre indicated that 35.4% of respondents had travelled to the centre by private car, either as a driver (28.9%) or as a passenger (6.5%). This level of car usage is lower than the other three centres in B&NES, which may be due to a number of factors such as:

- the large population within walking distance of the City Centre (22.5% walk to the centre);
- the availability of public transport (including park and ride);
- the cost and limited availability of car parking within the City Centre; and
- traffic congestion and delays entering the City Centre.

6.24 Approximately 11% of visitors indicated that they dislike the cost of parking in Bath and 8% disliked the lack of car parking. The survey showed that shoppers used a number of different City Centre car parks and on-street parking. The most popular car parks included Ham Gardens, The Podium (Waitrose), Avon Street and Charlotte Street. The Podium car park is the most central in relation to the prime shopping area, whilst the others are located outside the main shopping area.

6.25 A significant number of visitors choose to park outside the main shopping area and appear to be prepared to walk five to ten minutes to and from the centre. The location of these car parks is beneficial in discouraging traffic in the shopping area. The significant usage of edge of centre car parks, as shown in Table 4a in Section 4, may be in part due to the cost and limited supply of car parking within the main shopping area.

6.26 The historic nature of Bath and its status as a World Heritage Site have made traffic management particularly difficult. The volume of traffic has put a strain on the roads in the area, particularly around the City Centre. The Park and Ride system has helped to ease some of the problems by limiting traffic into the City Centre. The Council's main future objectives are to reduce and manage car access in the centre of Bath and to give priority to pedestrians, cyclists and bus users. Key elements of the future strategy include the clearer parking strategy for the city currently being progressed by the Council and the implementation of the Bus Strategy.

6.27 New traffic and parking controls may have an impact on the level of car accessibility into and within the City Centre. Clearly the benefits of future measures will need to be carefully assessed against any potential impact. The availability of frequent and convenient alternative modes of transport will be critical.

Public Transport and Park and Ride

6.28 Approximately 28% of visitors interviewed in Bath travelled to Bath City Centre by bus; a further 8% came by train and 4% used Park and Ride. The use of public transport in Bath was more than treble that achieved in the other three centres.

6.29 The City Centre benefits from an extensive network of bus routes servicing the Bath urban area and most parts of the rural catchment area. The bus station and train station are both centrally located and within walking distance of the main shopping area. However, the bus station is now dated and unattractive, such that proposals to redevelop the bus interchange and the Southgate Centre provide an opportunity to improve the image of this important gateway into the City Centre.

6.30 In addition to the bus station, there are bus stops located at numerous points around the City Centre. Some services operate using mini-buses and are able to access the residential areas of the city. These services appear to be well used but overcrowding appears to be a problem at peak hours.

6.31 There are currently four park and ride sites: Lansdown (north), University (south east), Odd Down (south) and Newbridge (west). The locations of the ark and ide facilities do not appear to be conveniently located for visitors arriving from the east of Bath, i.e. along the A4 London Road or the A36. Proposals for a new park and pide car park at Lambridge would improve access for these visitors.

6.32 The railway station is located in close proximity to the bus station at the southern end of the City Centre. Regular train services run to Bristol, Keynsham, Bradford-on-Avon, Trowbridge, Chippenham, Swindon and London Paddington. The railway station is an important gateway to the City Centre, especially for tourist visitors. Redevelopment of the Southgate area should also improve access from the station to the City Centre and improve the image of this gateway.

Pedestrian Access and Movement

6.33 Bath City Centre is relatively compact for a large regional shopping centre. The main shopping thoroughfare, along Southgate, Stall Street, Union Street and Milsom Street, is only about 800 metres in length. The shopping streets leading off this main thoroughfare provide natural circuits for pedestrians.

6.34 A number of specialist shopping/service areas have emerged, which provide a convenient concentration of shops and services for customers. For example, the Southgate area and the southern end of Stall Street is the main concentration of high street multiple retailers serving the day to day needs of local residents. The Union Street and Milsom Street area and the area to the east are the main specialist and boutique fashion shopping area. The area around Bath Abbey and Pump Rooms caters primarily for tourist visitors. The main concentration of restaurants, bars and leisure facilities is located to the west of Union Street.

6.35 Approximately 22.5% of visitors walked to Bath City Centre, which is a relatively high figure for a city the size of Bath, where access is restricted by the river and steep hills which may discourage pedestrians. Pedestrian routes into the city centre are well sign-posted and some are attractively routed through parkland (e.g. through Royal Victoria Park and along the river/canal).

6.36 However, 8.5% of visitors interviewed in Bath indicated that they disliked the level of traffic congestion in the City Centre. Pedestrian/vehicular conflict occurs in some unpedestrianised parts of the City Centre, which may explain the survey results. Pedestrian movement can be restricted by narrow pavements and heavy road traffic, particularly on George Street, Broad Street and Northgate. Pedestrian flows within the City Centre are concentrated along the *'central spine'* of Southgate, Stall Street, Union Street and Milsom Street, which are either traffic free or traffic restricted areas. The quality of paving varies along this central spine, with high quality materials used in the vicinity of the Pump Rooms, but with materials of varying quality and state of repair in other locations. In particular the quality of pavements and street furniture within the Southgate area and some of the side streets off the main thoroughfare are dated and unattractive. Continued improvements to the pavements will help to enhance the quality of the environment for pedestrian.

Pedestrian Counts

6.37 Pedestrian flow counts were undertaken in Bath City Centre in November 2003 by PMRS. The average weekly footfall for the 30 count points throughout the city centre has approximately 49,300, significantly higher than the other three town centres in B&NES.

6.38 The busiest recorded footfall was outside Vodafone (5 Burton Street) with a count of 102,710 per week. Pedestrian flows are also relatively high at count points in Union Street (over 80,000 per week) and in Stall Street (86,000 to 99,000 per week). Flows are slightly lower in Southgate (55,000 to 70,000 per week), the Southgate Shopping Centre (48,000 per week), Milsom Street (40,000 to 50,000 per week). These areas with the highest pedestrian flows are broadly consistent with the retail properties which command the highest Zone A rents as outlined earlier in this section.

6.39 Side streets leading off the main north-south spine and other more secondary street have slightly lower flow counts, between 20,000 to 40,000 per week, e.g. Broad Street, Quiet Street, Westgate Street, New Orchard Street, Church Street, Cheap Street, Union Passage and New Bond Street.

6.40 The lowest recorded weekly footfall was outside Adventure Café (5 Princes Buildings-George Street) at only 7,760. Other areas with relatively low counts were Westgate Buildings (11,000) and York Street (12,000).

6.41 Counts were recorded on a Thursday, Friday and Saturday. The average pedestrian count was 47% higher on Saturday compared with Friday. However, in the other three town centres in B&NES where there was only a slight increase in pedestrian flow on Saturday.

Summary of Bath City Centre's Strengths and Weaknesses

Strengths

- Bath is an international destination, attracting visitors from all over the world. It has a diverse role attracting visitors for a variety of reasons including shopping, employment, leisure and tourism.
- The historic nature and natural setting of the City Centre create an attractive and pleasant shopping environment. Proposed improvements, including redevelopment of the Southgate area, should further enhance the quality of the shopping environment.
- Bath City Centre is accessible by a choice of means of transport for residents and visitors, although traffic congestion on main routes into the City is a problem.
- The City Centre has a good choice and range of comparison shops and services, which cater for both locals and visitors, although there is a perception that there are too many tourist shops.
- The City Centre offers a good range of specialist retailers, including fashion, antiques and craft retailers.
- The vacancy rate in the centre is very low and the demand for premises is strong.

Weaknesses

- There is a shortage of modern retail premises suitable for new multiple retailers, particularly within the prime shopping areas. Many of the retail and service units in the City Centre are small and do not meet the requirements of most operators. In addition, many premises are Listed Buildings and opportunities for alterations or extensions are limited.
- The City Centre, particularly around the Abbey, Pump Rooms and Roman Baths is often congested with tourists. This congestion is exacerbated by narrow pavements and vehicular/pedestrian conflict.
- The Southgate and bus station area is dated and unattractive and does not match the City's World Heritage status. The quality of the streetscape in some other parts of the centre is now looking tired.
- There is a perceived limited supply of car parking within the main shopping area and some of the key car parks are a 5 to 10 minute walking distance from the City Centre. However, the location of car parks does help to relieve traffic congestion within the City Centre.
- Traffic congestion on the main routes into Bath and around the City Centre can increase drive times into the centre.

7.0 KEYNSHAM TOWN CENTRE

Mix of Uses and Occupier Representation

7.1 Keynsham is a smaller town centre between Bristol and Bath. The centre primarily serves the day-to-day shopping and service needs of local residents in Keynsham and Saltford. Its key roles include:

- *convenience shopping* - serving the local population, such as the Somerfield and Iceland food stores, newsagents and bakeries;
- *comparison shopping* - a small range of comparison shops, including a small number of multiples serving day-to-day shopping needs rather than higher order shopping:
- *entertainment and leisure* - including the leisure centre, pubs, cafés and restaurants;
- *services* - including banks, estate agents, travel agents, hairdressers and the library.

7.2 Keynsham town centre has 148 ground floor commercial units. The town centre has a lower proportion of Class A1 retail units compared with the national average and higher proportion of service uses, as shown in Table 7.1. One would normally expect a town centre of Keynsham's size to have a higher proportion of service uses and a lower proportion of comparison shops, reflecting its role as a lower order centre meeting the day to day needs of its local population. The vacancy rate is much lower than the national average at 4.1%, and has fallen slightly from 5.1% in 2000.

7.3 The number of retail units in Keynsham town centre has decreased since 2000 from 156 to 148, due in part to the amalgamation of units and where units have reverted back to non-retail uses.

7.4 Keynsham town centre has a slightly higher proportion of its units and retail floorspace devoted to the sale of convenience goods. Nonetheless, one would normally expect such centres as this to have a much higher proportion of convenience floorspace than the national average.

Table 7.1: Keynsham Town Centre Use Class Mix

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Keynsham	GB Average*
Class A1 (Retail)	70	47.3	57.4
Class A1 (Services)	19	12.8	9.1
Class A2	27	18.2	8.9
Class A3	20	13.5	12.7
Miscellaneous	6	4.1	1.5
Vacant & Under Const.	6	4.1	10.5
Total	148	100.0	100.0

Sources: NLP Street Survey 2004 and Goad Plans.
** UK average relates to all town centres surveyed by Goad Plans (Nov 2003)*

Table 7.2: Keynsham Retail Trade Mix Comparative Analysis

Type of Unit	% Total A1 Units		% A1 Gross Floorspace	
	Keynsham	GB Average*	Keynsham	GB Average*
Convenience	17.1%	16.2%	29.7%	24.0%
Comparison	82.9%	83.8%	70.3%	76.0%
Total	100.0%	100.0%	100.0%	100.0%

Sources: NLP Street Survey 2004 and Goad Plans.
** UK average relates to all town centres surveyed by Goad Plans (Nov 2003)*

Retailer Representation

7.5 Keynsham has a reasonable selection of comparison shops, with representation in all of the comparison goods categories, as shown in Table 7.3. There is a high proportion of comparison shops in the *'other'* category, which includes nine charity shops. The reduced provision of comparison shops is highlighted by the short average length of stay among visitors (i.e. 69% less than 1 hour) and the low average spend of £12.46 on non-food items.

7.6 Keynsham currently has a comparatively low provision of the following types of comparison goods compared to the national average:

- clothing and footwear,
- DIY, hardware and homewares; and
- Electrical, gas, music and photography shops.

7.7 Many of these types of retailers, especially the DIY and homewares traders prefer large format stores not readily available in Keynsham.

Table 7.3: Keynsham Breakdown of Comparison Units

Type of Unit	Keynsham		GB Average*	
	Units	%	Units	%
Clothing and Footwear	10	17.2	36	26.1
Furniture, carpets and textiles	4	7.0	13	9.7
Booksellers, arts, crafts and stationers	7	12.1	13	9.4
Electrical, gas, music and photography	3	5.2	15	10.8
DIY, hardware & homewares	2	3.4	9	6.3
China, glass, gifts & fancy goods	2	3.4	6	4.0
Cars, motorcycles & motor access.	1	1.7	4	3.0
Chemists, drug stores & opticians	7	12.1	11	7.8
Variety, department & catalogue	2	3.4	3	2.3
Florists, nurserymen & seedsmen	3	5.2	3	2.3
Toys, hobby, cycle & sport	3	5.2	8	5.6
Jewellers	2	3.4	6	4.7
Other comparison retailers	12	20.7	11	7.9
Total	**58**	**100%**	**138**	**100%**

Sources: NLP Street Survey 2004 and Goad Plans.
** UK average relates to all town centres surveyed by Goad Plans (Nov 2003)*

7.8 The town centre has a relatively high provision, compared to the national average, of:

- Booksellers, arts, crafts and stationers;
- Chemists, drug stores and opticians; and
- Florists, nurserymen and seedsmen.

7.9 A small number of national/regional multiple comparison retailers are present including:

- Spec Savers
- K Shoes
- Lloyds Chemists
- Stead & Simpson
- Boots
- Shoefayre
- Peacocks
- New Look

7.10 The street survey in Keynsham indicated that 26% of respondents suggest that the quality/range of shops was their main reason for visiting Keynsham and 18% cited the poor choice of shops as a dislike of the centre. For the majority of respondents it is the ease of getting to Keynsham that is their main reason for being there.

Service Uses

7.11 Keynsham has a good selection of service uses, as shown in Table 7.4, including a number of banks and financial services. The proportion of hairdressers and beauty parlours is comparable with the national average. However, the proportion of travel agents and estate agents is slightly higher.

Table 7.4: Keynsham Analysis of Selected Service Uses

Type of Use	Keynsham		GB Average*	
	Units	%	Units	%
Restaurants, cafes & takeaways	20	35.7	36	41.4
Banks & financial and other services	15	26.8	15	17.6
Estate agents and valuers	4	7.1	10	11.3
Travel agents	4	7.1	5	6.2
Hairdressers & beauty parlours	11	19.6	17	20.0
Laundries and dry cleaners	2	3.5	3	3.5
Total	**56**	**100.0**	**86**	**100.0**

Sources: NLP Street Survey 2004 and Goad Plans.
** UK average relates to all town centres surveyed by Goad Plans (Nov 2003)*

Leisure Use

7.12 Keynsham has a reasonable level of leisure uses for a town of its size. There is one privately run gym in addition to the local authority leisure centre.

7.13 There are a number of small restaurants and pubs in the town centre.

7.14 The catchment area of the town is such that it would be unlikely to support other leisure uses such as a cinema, bingo or ten pin bowling, where the operator demand is for large format floorspace.

The Supply of Commercial Premises

7.15 There were six vacant units in Keynsham at the time of survey. The vacancy rate is less than half the national average. Half of the vacant units are located in the peripheral secondary shopping areas at the northern end of the High Street. The other three are on the edge of the prime shopping area opposite Charlton Road.

7.16 As indicated earlier, there is a high proportion of *'Class A2'* (financial services) units within Keynsham, 14.6% compared to the UK average of 8.9%. However, there are two fewer A2 units in the centre compared with 2000, although the overall proportion remains the same. Continuing rationalisation within the financial services sector may threaten the long term viability of some of these outlets and would have an impact on vacancy rates in the future.

The Quality of Premises

7.17 Retail properties in Keynsham Town Centre are generally small and many are converted residential properties with relatively small floorspace areas. The majority appear to be in a good state of repair. *'The Centre'* at the end of the High Street is one of the more unattractive parts of the town centre, with a dated and unwelcoming appearance.

Property Indicators

7.18 Local agents suggest that Zone A rents of £430 per sq m have been achieved. The highest letting was to Clinton Cards at 50/50A High St at just above this. This can be compared to a lease renewal on No 63 in March 1999 at £270 per m. These figures suggest that Zone A rents have increased significantly in the last four years.

7.19 Valuation office information is available for Keynsham and other small towns in the South West as shown in Table 7.5. This information suggests that prime yields have remained the same between 1999 and 2004. Keynsham has a similar prime yield to other sub-urban centres in Bristol, such as Kingswood, but a higher yield than the larger centres of Trowbridge and Chippenham.

Table 7.5: Retail Yields in Keynsham

Area	Yield %	
	1999	2004
Keynsham	**9.50**	**9.50**
Kingswood	9.50	9.50
Yate	8.50	8.50
Thornbury	9.50	9.50
Chippenham	7.50	8.00
Trowbridge	8.50	8.50
Melksham	10.00	10.00
Bristol – Bedminster	10.00	10.00
Bristol – Fishponds	10.00	10.00

Source: Valuation Office (January 2004)

Accessibility

Parking and Car Access

7.20 The visitor survey indicates that almost 58% of visitors travelled by private car to Keynsham. The majority of car-borne visitors used the Ashton Way car park (43%), which is centrally located adjacent to the main shopping area via a pedestrian link and the Somerfield store. The other two public car parks, at St. John's Court and the Civic Centre, are also conveniently located at either end of the main shopping area and are used by as many respondents who parked on-street.

7.21 17% of respondents mentioned either availability or cheap car parking as a reason for choosing to come to Keynsham and only 6% mentioned the lack of parking or cost as a dislike factor of the centre. This suggests that the town centre has an adequate provision of public car parks. In addition, there is a limited supply of on-street car parking in the High Street for short stay parking and drop-off points.

Public Transport

7.22 A relatively small proportion of visitors in Keynsham (9%) used public transport to travel to the centre, even though it is served by a number of regular bus services. There are four different bus services which pass through Keynsham at least hourly from either Bath or Bristol. However, the frequent through services provide local residents with good links to a greater choice of shopping in these city centres and therefore acts as a draw away from Keynsham rather than a pull of shoppers towards it.

Pedestrian Movement

7.23 Keynsham Town centre has a linear shopping area along the High Street, extending approximately 750 metres. As a result, the peripheral areas at the north and southern end of the High Street are a reasonable distance from the prime shopping area. Many of the vacant units and A3 uses are in these peripheral areas.

7.24 The town centre is within walking distance of most parts of the built up area of Keynsham and a significant proportion of visitors do walk to the centre (30%). The town's main residential areas are located to the west and to the south east of the town centre. The south east part of the town is separated by the valley of the River Chew, which may act as a psychological barrier to pedestrian movement.

7.25 Traffic flows along the High Street are significant, making it difficult to cross the road. The High Street is the main route for traffic entering or leaving Keynsham along the A4175 and B3116. However, traffic congestion was mentioned by only 8% of respondents as a dislike factor of the centre.

7.26 Pedestrian flow counts were undertaken in Keynsham Town centre in February 2004 by PMRS. The average footfall for the 20 count points over the week was 11,300 which is much lower than the average for Bath city centre (49,000). However, the Keynsham average is higher than Midsomer Norton and Radstock the town centres (72% greater than Radstock and 51% greater than Midsomer Norton).

7.27 The central high-street area has the highest the pedestrian counts. The busiest recorded footfall in Keynsham was outside Church's CTN (60 High Street) with a weekly count of 35,120, over three times the centre average. The highest pedestrian flows are concentrated between Numbers 40 to 60 in the High Street (above 20,000 per week). Flows are also relatively high in Temple Street (23,000).

7.28 Elsewhere within Keynsham town centre pedestrian flows are below 15,000 per week. The lowest recorded footfall was outside Enterprise video (5 Station Road). Low pedestrian flows were also recorded at Numbers 1 to 10 in the High Streets and Numbers 25 to 44 Temple Street.

7.29 The average daily pedestrian flows did not increase greatly between Friday and Saturday (6.6%) which is similar for the three small town centres in B&NES.

Summary of Keynsham's Strengths and Weaknesses

Strengths

- Keynsham has a good range of shops that cater for the day-to-day needs of local residents. The selection of comparison shops is small but all of the main goods categories are represented.
- The vacancy rate is low, particularly within the prime shopping area, suggesting that demand for units is relatively strong.
- The town centre caters for most local service needs and attracts frequent local visitors to the banks and other facilities.
- The library and leisure centre complement the town centre's retail role.
- The centre has three main car parks accessible to the shopping area.

Weaknesses

- The centre has only a limited number of national multiples and has a small catchment area for comparison shopping. Most residents look to larger centres in Bristol and Bath for higher order comparison shopping.

- The average length of stay and average spend per visitor are both relatively low, although average expenditure has improved since 2000.

- Keynsham town centre does not have a large food store suitable for bulk food shopping (taking place out of centre).

- There are a limited number of units available for new occupiers. Most retail premises are generally small and unsuitable for national multiples.

- Some 1960/70s buildings are unattractive. However, historic buildings in other parts of the town centre provide an attractive shopping environment.

- Bus services provide a convenient service to larger competing centres in Bath and Bristol.

- Retailing in the peripheral areas is relatively weak.

- Traffic flows along the High Street are relatively heavy.

8.0 MIDSOMER NORTON TOWN CENTRE

Mix of Uses and Occupier Representation

8.1 Midsomer Norton is a small market town seven miles to the south west of Bath. The centre primarily serves the day-to-day shopping and service needs of residents of Norton Radstock and surrounding villages, including Paulton and Peasedown St Johns. Its key roles include:

- *convenience shopping* - serving the town's catchment area for main and top-up food shopping e.g. Safeway, Somerfield and Lidl, which are supported by other local needs facilities; a Tesco food store out-of-centre draws much of this potential trade;
- *comparison shopping* – a small range of comparison shops serving day-to-day shopping needs rather than higher order shopping;
- *entertainment and leisure* – including the leisure centre, pubs, cafés and restaurants;
- *services* – including banks, travel agents, hairdressers and the library.

8.2 Midsomer Norton has a lower proportion of Class A1 retail units compared with the national average, as shown in Table 8.1. Conversely, there is a much higher proportion of Class A2 banks/financial services. The vacancy rate remains at approximately half the national average, although it is slightly higher than the rates in Bath and Keynsham. The centre has a high proportion of retail floorspace devoted to the sale of convenience goods, due to the three main food stores (Safeway, Somerfield and Lidl), as shown in Table 8.1. As a result, many customers visit the town centre frequently, i.e. over 60% of shoppers visit at least 2-3 times a week.

8.3 The number of retail units in Midsomer Norton town centre has decreased from 135 to 127 since 2000, as the previous report included several units on the edge of the centre, not included in the town centre boundary.

Table 8.1: Midsomer Norton Town Centre Use Class Mix

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Midsomer Norton	GB Average*
Class A1 (Retail)	60	47.2	57.4
Class A1 (Services)	14	11.1	9.1
Class A2	21	16.5	8.9
Class A3	18	14.2	12.7
Miscellaneous	7	5.5	1.5
Vacant & Under Const.	7	5.5	10.5
Total	127	100.0	100.0

Sources: NLP Street Survey 2004 and Goad Plans.
** UK average relates to all town centres surveyed by Goad Plans (Nov 2003)*

Table 8.2: Midsomer Norton Retail Trade Mix Comparative Analysis

Type of Unit	% Total A1 Units		% A1 Gross Floorspace	
	Midsomer	GB Average*	Midsomer	GB Average*
Convenience	21.5%	16.2%	46%	24.0%
Comparison	78.5%	83.8%	54%	76.0%
Total	100.0%	100.0%	100.0%	100.0%

Sources: NLP Street Survey 2004 and Goad Plans.
** UK average relates to all town centres surveyed by Goad Plans (Nov 2003)*

8.4 Despite the large amount of convenience goods floorspace, one third of respondents in the street surveys indicated that they were only intending to purchase non-food items, possibly reflecting the out-of-centre Tesco food retailing opportunity.

Retailer Representation

8.5 Midsomer Norton town centre has almost one third of the number of comparison goods shops compared to the national town centre average. There is a limited number of national/regional multiples, excluding four charity shops in the centre, and most comparison shops are independent operators. These independent traders offer a reasonable range of goods as shown in Table 8.3.

8.6 When compared to the national average, there is an under provision of the following types of comparison goods:

- Clothing and Footwear;
- Booksellers, arts, crafts and stationers; and
- DIY, hardware & homewares.

8.7 The town centre has a lack of large format stores which would be suitable for DIY, hardware and homewares retailers. The only current provision as at March 2004 is Caswells at the western end of the High Street, which has had to knock through four adjacent units to form a unit large enough. Compared to the national averages, Midsomer Norton is well served for toys, hobby, cycle and sports goods.

Table 8.3: Midsomer Norton Breakdown of Comparison Units

Type of Unit	Midsomer		GB Average*	
	Units	%	Units	%
Clothing and Footwear	8	16.3	36	26.1
Furniture, carpets and textiles	6	12.3	13	9.7
Booksellers, arts, crafts and stationers	2	4.1	13	9.4
Electrical, gas, music and photography	6	12.3	15	10.8
DIY, hardware & homewares	1	2.0	9	6.3
China, glass, gifts & fancy goods	3	6.1	6	4.0
Cars, motorcycles & motor access.	1	2.0	4	3.0
Chemists, drug stores & opticians	5	10.2	11	7.8
Variety, department & catalogue	4	8.2	3	2.3
Florists, nurserymen & seedsmen	2	4.1	3	2.3
Toys, hobby, cycle & sport	5	10.2	8	5.6
Jewellers	1	2.0	6	4.7
Other comparison retailers	5	10.2	11	7.9
Total	**49**	**100%**	**138**	**100%**

Sources: NLP Street Survey 2004 and Goad Plans.
** UK average relates to all town centres surveyed by Goad Plans (Nov 2003)*

8.8 The street survey in Midsomer Norton suggests that a significant proportion of shoppers (34%) dislike the range of shops in the town centre. In particular 15% mentioned the lack of large shops. The limited range of comparison shops has resulted in a short average length of stay (less than one hour) and a low average spend per visitor (£16.65), which has decreased since 2000.

Service Uses

8.9 Midsomer Norton has a good selection of service uses, as shown in Table 8.4. There is a high proportion of banks/financial services, although there are three less than in 2000. The continuing rationalisation within the financial services sector may threaten the long term viability of some of these outlets, with an impact on vacancy rates in the future.

Table 8.4: Midsomer Norton Analysis of Selected Service Uses

Type of Use	Midsomer Norton		GB Average*	
	Units	%	Units	%
Restaurants, cafes & takeaways	17	31.5	36	41.4
Banks & financial and other services	14	25.9	15	17.6
Estate agents and valuers	8	14.8	10	11.3
Travel agents	3	5.6	5	6.2
Hairdressers & beauty parlours	11	20.4	17	20.0
Laundries and dry cleaners	1	1.8	3	3.5
Total	**54**	**100.0**	**86**	**100.0**

Sources: NLP Street Survey 2004 and Goad Plans.
** UK average relates to all town centres surveyed by Goad Plans (Nov 2003)*

Leisure Use

8.10 Midsomer Norton has a reasonable level of leisure uses for a town of its size. There are three privately run gyms in addition to the local authority leisure centre.

8.11 There are a number of restaurants, bars and pubs in the town centre.

8.12 The catchment area of the town is such that it would be unlikely to support other leisure uses such as a cinema, bingo or ten pin bowling, where the operator demand is for large format floorspace.

The Supply of Commercial Premises

8.13 There were seven vacant units in Midsomer Norton town centre at the time of survey, spread throughout the town centre and of varying size and quality.

8.14 Many retail properties in Midsomer Norton are small converted residential properties. There is a mix of historic buildings and more modern in-fill development. The state of repair of most premises is reasonable, although some of the vacant units are relatively rundown, for example the former Palladium Cinema. Holly Court provides a small but pleasant covered shopping arcade.

Property Indicators

8.15 Prime retail Zone A rental levels in Midsomer Norton were around £160 per sq m in 2000. These were slightly lower than those achieved in Keynsham but higher than in Radstock. Letting agents indicate that Midsomer Norton now achieves Zone A rents of over £215 per sq m (£20 per sq ft). However, rents vary significantly along the linear high street. Rents are highest at the southern end. Yields within Midsomer

Norton are comparable with other small towns in the area (10% to 11%).

Accessibility

Parking and Car Access

8.16 The visitor survey indicated that almost 60% of visitors travelled by private car to Midsomer Norton town centre. The three main areas for car parking are the Hollies car park, which is well linked to the Safeway store and adjacent to the main shopping area; the South Road car park, which is linked to the Holly Court shopping arcade; and on-street parking along the High Street, which is limited to a maximum one hour stay. The on-street parking restriction could be contributing to the relatively short average duration of trip (50 minutes) and consequent low average spend.

Public Transport

8.17 Only 10% of visitors interviewed in the street survey had travelled to Midsomer Norton by bus; this was an increase of 2% from 2000. There are a number of bus services that link Midsomer Norton with Radstock and other surrounding towns and villages and several routes terminate within the heart of the town centre. Bus stops are located on the High Street and adjacent to the Town Hall. Most of these buses go on to other towns including, for example, regular bus services to Bath, Bristol (via Keynsham) and Frome. These services provide local residents with good links to a greater choice of shopping in Bath and Bristol.

Pedestrian Access and Movement

8.18 Midsomer Norton has a linear shopping area that runs mainly along the High Street from the junctions with Church Lane at the western end and with Station Road at the eastern end.

8.19 The town centre is within walking distance of most parts of the built up area of Midsomer Norton and a significant proportion of visitors walk to the centre (29%). The north east end of the High Street appears to have lower levels of pedestrian flow and lacks an anchor use. Non-retail uses, including housing, have created gaps in the frontage. There are also a number of gaps in the retail frontage on the north side of the High Street discouraging pedestrian flows in parts of the town.

8.20 Pedestrian flow counts were undertaken in Midsomer Norton town centre in March

2004 by PMRS. The average weekly flow count for the 20 count points within the town centre is only 5,700, a fraction of the average (49,000) in Bath city centre. The average weekly footfall is 43% higher than in Radstock, but 51% lower than in Keynsham.

8.21 The busiest area is the middle section of the High Street. The highest recorded weekly footfall was outside Martin Newsagent (102-103 High Street) at 14,050 people. In this area flows appear to be higher on the southeast side of the High Street.

8.22 The lowest recorded footfall was outside West Country Vehicles (High Street) at the northern extremity of the High Street. Pedestrian flows are much lower (about 3,000 per week or less) at the north east half of the High Street and at the South West end around the Island.

8.23 The percentage increase in average pedestrian count did not increase greatly between Friday and Saturday (6.3%) which is the same for both Radstock and Keynsham.

8.24 Traffic flows along the High Street (B3355) are not as heavy as traffic levels experienced in Keynsham and Radstock and only 1% of respondents of the street survey indicated they disliked traffic congestion within the centre. This has significantly decreased from 14% of respondents in 2000, suggesting that perceived congestion has improved.

8.25 The River Somer is a potentially attractive feature but acts as a barrier to pedestrian movement from one side of the High Street to the other. Pedestrian linkages between the Safeway store and the High Street are not ideal. Similar linkage problems exist at the Somerfield and Lidl food stores, whose entrances are set back from the High Street.

Environment

8.26 Midsomer Norton has a number of attractive stone buildings. These buildings and the River Somer, which flows along the middle of the High Street, provide an attractive streetscape. However, some buildings detract from the town centre environment and there may be scope for selective redevelopment and/or refurbishment to improve the overall urban environment.

Summary of Midsomer Norton's Strengths and Weaknesses

Strengths

- Midsomer Norton has a good range of shops that cater for the day-to-day needs of local residents. The range of food stores is excellent. The selection of comparison shops is small but all of the main goods categories are represented.
- The town attracts frequent shoppers from a local catchment area.
- The vacancy rate is low, particularly within the prime shopping area, suggesting demand for units is relatively strong.
- The town centre caters for most local service needs, attracting frequent local visitors to the banks and other facilities.
- The library and leisure centre complement the town centre's retail role.
- The centre has a number of public car parks accessible to the shopping area, supported by on-street parking.
- The town centre has a reasonably attractive shopping environment. The town benefits from a number of attractive, historic buildings and the River Somer.

Weaknesses

- The centre has very few national multiples and has a small catchment area for comparison shopping. Most residents look to larger centres in Bristol, Bath and Frome for higher order comparison shopping.
- The average length of stay and average spend per visitor are very low and have decreased since 2000.
- There are a limited number of units available for new occupiers, especially large units. Most retail premises are generally small and unsuitable for national multiples.
- Bus services provide a good service to larger competing centres, primarily Bath and Frome.
- Gaps in the retail frontage restrict pedestrian flow on the west side of the High Street and fragment the shopping area.
- The centre is very elongated, resulting in retailing in the peripheral areas being relatively weak.

9.0 RADSTOCK TOWN CENTRE

Mix of Uses and Occupier Representation

9.1 Radstock is a very small shopping centre dominated by the Radco superstore. The centre has two key roles. The parade of shops/services acts as a local/neighbourhood shopping centre for local residents within Radstock but the Radco store has a wider catchment area for food and grocery and for comparison shopping. The Mining Museum, pubs and restaurants attract leisure visitors.

9.2 Radstock has only 41 ground floor commercial units. The current vacancy rate is the highest of the four centres, with a concentration of vacant units on Wells Hill. The centre also has a higher than average proportion of Class A2 financial/other services and a lower proportion of retail units, as shown in Table 9.1.

9.3 The number of retail units in Radstock has decreased since the 2000 report, from 53 to 41. The previous report identified several vacant units which have since become non-retail uses i.e. offices and residential properties and these units are not included in Table 9.1.

Table 9.1: Radstock Town Centre Use Class Mix

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Radstock	GB Average
Class A1 (Retail)	22	53.7	57.4
Class A1 (Services)	5	12.5	9.1
Class A2	5	12.5	8.9
Class A3	6	14.6	12.7
Miscellaneous	0	0	1.5
Vacant & Under Const.	3	7.3	10.5
Total	41	100.0	100.0

Sources: NLP Street Survey 2004 and Goad Plans.
** UK average relates to all town centres surveyed by Goad Plans (Nov 2003)*

9.4 The proportion of convenience retail shops is higher than average, as shown in Table 9.2. The Radco food store accounts for a large proportion of the overall retail floorspace in Radstock, and is the main anchor for the centre. In terms of total convenience and comparison goods floorspace, an allowance has been made on a 50/50 split basis between the goods in the Radco store. Other shops and services in Radstock cater for the day to day needs of local residents, including the bakers, butchers, newsagents, florist, optician, chemist, hairdressers, takeaways and public houses.

Table 9.2: Radstock Retail Trade Mix Comparative Analysis

Type of Unit	% Total A1 Units		% A1 Gross Floorspace	
	Radstock	GB Average*	Radstock	GB Average*
Convenience	22.7%	16.2%	37.6%	24.0%
Comparison	77.3%	83.8%	62.4%	76.0%
Total	100.0%	100.0%	100.0%	100.0%

Sources: NLP Street Survey 2004 and Goad Plans.
** UK average relates to all town centres surveyed by Goad Plans (Nov 2003)*

Retailer Representation

9.5 Radstock has a very small selection of comparison shops. A number of key comparison sectors have little availability in the centre, as shown in Table 9.3. However, the centre has a small number of specialist independent comparison shops that one would not normally expect to find in local shopping centres e.g. Automania, Bike It Cycles and Pets Choice. There are also two relatively large furniture shops.

Table 9.3: Radstock Breakdown of Comparison Units

Type of Unit	Radstock		GB Average	
	Units	%	Units	%
Clothing and Footwear	1	5.9	36	26.1
Furniture, carpets and textiles	3	17.6	13	9.7
Booksellers, arts, crafts and stationers	1	5.9	13	9.4
Electrical, gas, music and photography	2	11.8	15	10.8
DIY, hardware & homewares	2	11.8	9	6.3
China, glass, gifts & fancy goods	0	0	6	4.0
Cars, motorcycles & motor access.	1	5.9	4	3.0
Chemists, drug stores & opticians	2	11.8	11	7.8
Variety, department & catalogue	1	5.9	3	2.3
Florists, nurserymen & seedsmen	1	5.9	3	2.3
Toys, hobby, cycle & sport	1	5.9	8	5.6
Jewellers	0	0	6	4.7
Other comparison retailers	2	11.8	11	7.9
Total	**17**	**100%**	**138**	**100%**

Sources: NLP Street Survey 2004 and Goad Plans.
** UK average relates to all town centres surveyed by Goad Plans (Nov 2003)*

Service Uses

9.6 Radstock has a number of service uses meeting the day-to-day needs of local residents, e.g. banks, takeaways and hairdressers, as shown in Table 9.4, providing a reasonable selection. There are no travel agents or dry cleaners' units in Radstock, although there is a travel agent service within the Radco store.

Table 9.4: Radstock Analysis of Selected Service Uses

Type of Use	Radstock		GB Average	
	Units	%	Units	%
Restaurants, cafes & takeaways	6	46.1	36	41.4
Banks & financial and other services	3	23.1	15	17.6
Estate agents and valuers	1	7.7	10	11.3
Travel agents	0	0	5	6.2
Hairdressers & beauty parlours	3	23.1	17	20.0
Laundries and dry cleaners	0	0	3	3.5
Total	**13**	**100.0**	**86**	**100.0**

Sources: NLP Street Survey 2004 and Goad Plans.
** UK average relates to all town centres surveyed by Goad Plans (Nov 2003)*

The Supply of Commercial Premises

9.7 There were three vacant units in Radstock in March 2004. The units are either in a poor state of repair or appear to be in the process of renovation.

Property Indicators

9.8 In 1999 prime Zone A rental levels were around £120 per sq m, slightly lower than those achieved in Midsomer Norton (£160 per sq m) and Keynsham (£170 per sq m). Valuation Office information is provided for Radstock in June 2003 suggests maximum Zone A rental levels in Radstock were around £185 per sq m, on The Street and near Radco. Other parts of the town centre were as follows:

- Fortescue Road - around £170 per sq m;
- Wells Road - around £130 per sq m;
- County Bridge - around £130 per sq m;
- Market Place - around £120 per sq m; and
- Waldegrave Forecourt - around £80 per sq m.

Source: Valuation Office, June 2003

Accessibility

Parking and Car Access

9.9 Over two thirds of shoppers in the street survey travelled to Radstock by car, the majority of them (64%) using the Radco car park. These levels have remained unchanged since 2000. Pedestrian links from this main car park to the Radco store entrance are very good, with the consequence that many Radco shoppers do not link their trip to the store with other activities in the town centre.

9.10 Whilst Radstock appears to have adequate car parking, linkages between the Radco car park and the rest of the centre are not ideal.

Public Transport

9.11 Only 11% of respondents had travelled to Radstock by bus, almost double the proportion that travelled by public transport in 2000 (6%). There are a number of bus services linking Radstock with Midsomer Norton and its wider choice of shops. The Radco store operates a number of bus routes to surrounding villages.

Pedestrian Movement and Accessibility

9.12 Only 17.5% of visitors surveyed in Radstock had walked to the centre, a lower proportion than in the other three centres. Again, this low figure is due to the dominance of car borne trips to the Radco store. The centre is within walking distance of most residential areas of Radstock but the uphill walk home from the centre may discourage some pedestrians.

9.13 Pedestrian flow counts were undertaken throughout Radstock town centre in March 2004 by PMRS. The average weekly footfall for the 12 count points was the lowest of all the town centres in B&NES, with a weekly average of only 3,300 people.

9.14 The busiest recorded footfall counts were outside Radco Co-op entrances, where the recorded footfall for the week was 8,600 people (car park entrance) and 6,500 for the Wells Hill entrance. The Radco Superstore clearly dominates activity within the town centre.

9.15 Elsewhere, The Street had higher flows than the remainder of the town centre (around 5,000 per week). Weekly flows within Fortescue Road were 2,400 to 4,000. Elsewhere flow counts were below 1,700 per week. The lowest pedestrian flow was recorded at the Norton College Shop (3 Wells Hill) at 900 people.

9.16 As in Keynsham and Midsomer Norton is was not significant difference between Friday and Saturday flowcounts, with an 8.2% increase in average pedestrian flow on Saturday.

9.17 The centre is located at a busy crossroads, where the A367 and A362 intersect and heavy traffic dominates the area. Pedestrian movement in Radstock is hindered by the busy roundabout junction that dissects the centre into four separate areas. Heavy traffic can make it difficult to cross from one area to another, for example from the Radco store to The Street and Fortescue Road, despite the pedestrian crossing.

9.18 The dominance of the road network contributes to the lack of a cohesive centre for Radstock. Shops are spread out in small clusters and frontages, weakening Radstock's retailing function.

9.19 Traffic congestion was mentioned by 15% of respondents as a dislike of the centre, which is almost the same as the response in 2000 (14%) indicating that the problem has not been improved since this time. However, the area where the *local needs* shops and services are concentrated, at The Street and Fortescue Road, offers a relatively quiet pedestrian friendly environment.

Summary of Radstock's Strengths and Weaknesses

Strengths

- Radstock is anchored by the Radco store, with a good selection of convenience and comparison goods and dedicated car parking. However, the reliance on this store to attract customers is clearly a weakness for the centre if this store were to close in the future.
- The centre also caters for the local shopping needs of the area. The Street/Fortescue Road area offers a convenient focus of local shops and services.
- The centre has a small number of specialist comparison shops, attracting customers looking for specific goods.
- The Mining Museum offers the potential to enhance tourist trade in the centre.

Weaknesses

- Heavy traffic on the A362 and at the A362/A367 roundabout junction neither creates a pleasant shopping environment nor does it encourage pedestrian movement between the different parts of the centre.
- Midsomer Norton town centre is nearby and offers a wider range and choice of shops and services.
- The range of goods and services available from Radco provides strong competition for the surrounding outlets.

10.0 QUANTITATIVE SCOPE FOR RETAIL DEVELOPMENT

Introduction

10.1 The ability of existing facilities to meet the needs and aspirations of customers can be examined in a number of ways. As set out in Section 2.0, need should be assessed as both quantitative and qualitative. Quantitative need relates to demand in terms of available expenditure.

10.2 This section assesses the quantitative scope for new retail floorspace in B&NES in the period from 2004 to 2011. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping.

10.3 This capacity analysis however, does not correspond directly to identified need, and it must be considered in conjunction with retailer's demands and a qualitative assessment, as set out in Section 11.0.

Methodology and Data

10.4 All monetary values expressed in this analysis are at 2002 prices unless stated otherwise.

10.5 The quantitative analysis is based on a study area defined for the four main town centres within B&NES. The study area has been divided into 12 zones or sectors for more detailed analysis.

10.6 This study area is shown on Plan 1 in Appendix A. The extent of the area is based on postcode area boundaries and the proximity of the major competing shopping destinations, i.e. Bristol, Cheltenham and Swindon. Shopping facilities within B&NES are expected to attract most of their trade from residents within the study area, although there will be an element of trade drawn from beyond the study area.

10.7 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for the study area for the year 2002 have been obtained. The previous 2000 Study adopted MapInfo local expenditure estimates. Both sources of information (Experian and MapInfo) are based on Central Government statistics and demographic data. However, Experian provide the most up to date expenditure figures for 2002 rather than 2001 data currently available from MapInfo. Therefore Experian data has been adopted in this study.

10.8 Experian's latest national expenditure projections between 2002 and 2012 have been used to forecast expenditure within the study area. Unlike previous expenditure growth rates provided by The Data Consultancy (formerly URPI), which were based on past trends, Experian's projections are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of disaggregated consumer spending volumes, prices and value. The model incorporates assumptions about income and price elasticities.

10.9 Experian provides two recommended growth rates for the periods 2003 to 2007 and 2003 to 2012. The recommended growth rates for the period 2003 and 2007 are 1.1% per annum for convenience goods and 4.8% per annum for comparison goods. These growth rates have been used in this study to forecast expenditure per capita up to 2007. Trend line adjusted growth rates (0.9% and 3.4% per annum for convenience and comparison goods respectively) have been adopted to project expenditure between 2007 and 2012, consistent with Experian's overall growth forecasts for 2003 to 2012. Growth in expenditure beyond 2012 is based on 1% and 4.1% per annum for convenience and comparison goods respectively, in line with Experian's growth forecast for 2007 to 2012.

10.10 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates is based on a range of factors including:

- information from the household and on-street surveys;
- the level and quality of retail facilities; and
- the relative distance between shopping centres and study area zones.

10.11 The total turnover of shops within the study area is estimated on the basis of expected penetration rates and the expected level of expenditure inflow. These turnover estimates are converted into average turnover to sales floorspace densities. Turnover densities are compared with company average turnover to sales floorspace densities and benchmark turnover levels in order to identify potential surplus capacity.

Population and Spending

10.12 The study area population for 2001 to 2011 is set out in Table 1B in Appendix B, based on the 2001 Census and Avon JSPTU and Wiltshire County Council's district-wide growth projections. Population within the study area is expected to increase between 2001 and 2011 by 6.3%. Table 2B in the Appendix B sets out the forecast growth in spending per head for convenience goods within each zone in the study area. Comparison forecasts of per capita spending are shown in Table 1C.

10.13 The levels of available spending are derived by combining the population in Table 1B and per capita spending figures in Tables 2B and 1C. For both comparison and convenience spending, a reduction has been made for special forms of trading such as mail order and vending machines.

10.14 As a consequence of the forecast growth in per capita spending, convenience goods spending within the study area is forecast to increase by 11.1% from £617.58 million in 2004 to £687.35 million in 2011, as shown in Table 3B.

10.15 Comparison goods spending is forecast to increase by 36.8% from £1.041 billion in 2004 to £1.424 billion in 2011, as shown in Table 2C. These figures relate to real growth and exclude inflation.

Existing Retail Floorspace

10.16 Existing convenience goods retail sales floorspace within the four towns, including freestanding out-of-centre food stores, is 29,985 sq m net as set out in Table 1A, Appendix A. This floorspace figure excludes comparison sales floorspace within food stores (estimated to be 3,252 sq m net).

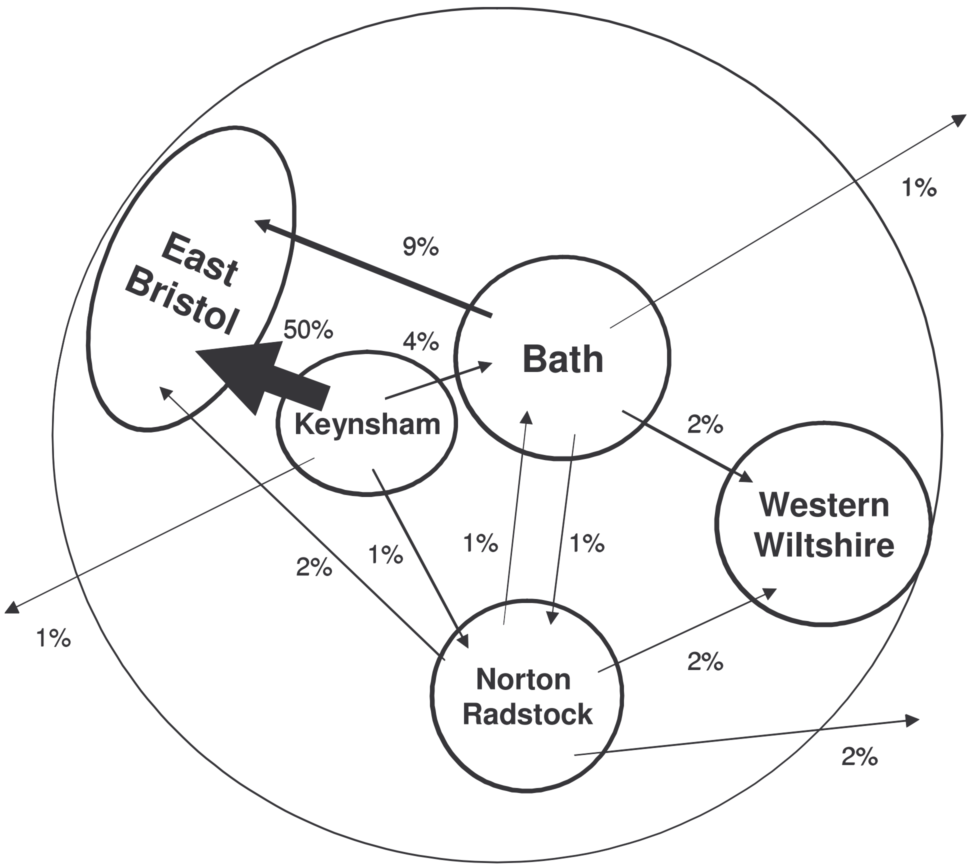
10.17 Comparison goods retail floorspace within the four towns (including retail warehouses and local shops in Bath) is set out in Table 2A, Appendix A. Total identified comparison sales floorspace in B&NES is estimated to be 92,200 sq m net, including the allowance for comparison sales floorspace within food stores (3,252 sq m net).

Existing Spending Patterns 2004

Convenience Shopping

10.18 The results of the NEMS household shopper survey undertaken between 22nd March and 4th April 2004 and a household survey undertaken in 2000, have been used to estimate existing shopping patterns within the study area. The estimates of market share or penetration within each study area zone are shown in Table 4B, Appendix B. Figure 10.1 below shows the estimated cross flows of convenience expenditure to and from the three main areas, i.e. Bath, Keynsham and Norton Radstock.

Figure 10.1: The Cross Flows of Convenience Goods Expenditure 2004



10.19 Figure 10.1 shows that the cross flows of convenience expenditure between Bath, Keynsham and Norton Radstock are relatively low (4% or less). However, the level of expenditure leakage from the Keynsham area to large food stores in East Bristol is significant (50%). Furthermore, the outflow of expenditure from Bath to East Bristol (9%) is also relatively high, and the may be potential for food store development in Bath and Keynsham to reduce expenditure outflow.

10.20 The level of convenience goods expenditure available for shops in B&NES at 2004 is £230.02 million, as shown in Tables 5B, Appendix B. Convenience expenditure retention within B&NES (broadly zones 1 to 5) is estimated to be about 80%. Therefore, around 20% of convenience goods expenditure (£47.65 million) is estimated to be spent outside B&NES, primary at large food superstores in Bristol and to a lesser extent food stores in Frome and West Wiltshire. However, £42.72 million is estimated to be attracted from residents who live outside B&NES. Therefore, the net outflow of expenditure from B&NES is only £4.93 million.

10.21 Company average turnover to sales floorspace densities are available for major food store operators. Company average sales densities (adjusted to exclude petrol and comparison sales and to include VAT) have been applied to the sales area of the large food stores listed in Table 1A, Appendix A, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store but does provide a helpful basis for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms. Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 1A, for consistency with the use of goods based expenditure figures.

10.22 Average sales densities are not widely available for small convenience shops, particularly independent retailers. We have assumed that small shops within B&NES will have an average sales density of £4,000 per sq m (£372 per sq ft). The total convenience goods benchmark turnover of all identified food stores/ convenience shops is therefore £209.92 million, as shown in Table 1A, Appendix A. Our assessment suggests convenience goods expenditure available for these shops/stores in 2004 is £230.02 million, such that existing convenience sales floorspace is trading above (about 9.6% above) the expected benchmark turnover. The estimates of available expenditure are summarised and compared with the benchmark turnover in Table 10.1.

10.23 The assessment of existing shopping patterns suggests that some large food stores in B&NES are trading well above their respective company average sales densities, in particular the Waitrose and Sainsbury stores in Bath and the Tesco in Paulton.

Table 10.1: Convenience Trading Levels in 2004 (£ millions)

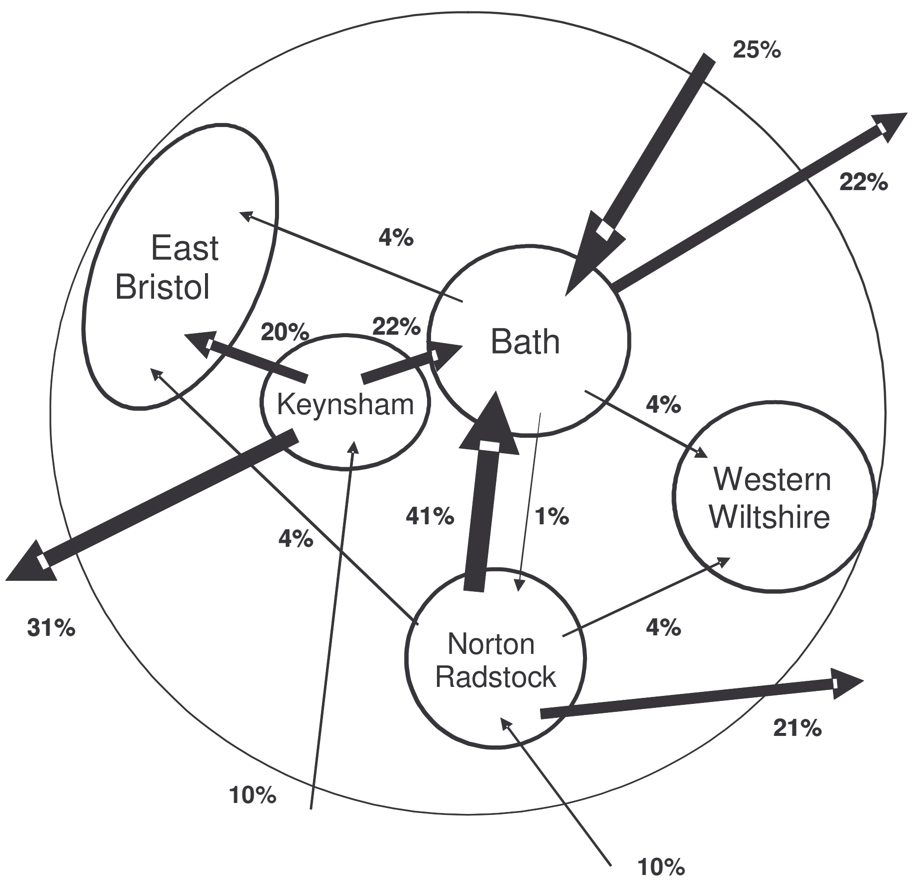
Centres	Available Expenditure	Benchmark Turnover	Difference
Bath	150.25	129.28	+20.97
Keynsham	21.14	23.29	-2.15
Midsomer Norton/Radstock	58.63	57.35	+1.28
TOTAL	**230.02**	**209.92**	**+20.10**

Source: Table 1A (Appendix A) and Table 5B (Appendix B)

Comparison Shopping

10.24 The estimated available comparison goods expenditure for B&NES at 2004 is £526.6 million, as shown in Table 3C, Appendix C. Figure 10.2 below shows the estimated cross flows of comparison goods expenditure to and from the three main areas, i.e. Bath, Keynsham and Norton Radstock.

Figure 10.2: The Cross Flows of Comparison Goods Expenditure 2004



10.25 Figure 10.2 shows that the cross flows of comparison goods expenditure to Bath from Keynsham and Norton Radstock are much higher than for convenience goods expenditure (22% and 41% respectively). However, the level of expenditure leakage from Bath to other centres beyond the study area is also much higher (22%). There is potential for comparison retail development within B&NES to reduce comparison expenditure outflow.

10.26 Comparison expenditure retention within B&NES (zones 1 to 5) is estimated to be about 66%. Therefore, we estimate that about 34% (or £136 million) of comparison expenditure leaks from B&NES to other centres in the surrounding area. However, over £266 million is estimated to be attracted from residents who live outside B&NES, primarily (£252 million) to Bath City Centre. Therefore, there is a net inflow of comparison goods expenditure into B&NES of around £130 million.

10.27 The retention of comparison expenditure varies across B&NES and the rest of the study areas, from about 70% in Zones 1, 3 and 5 to only 47% in Zone 2 (Keynsham), where the outflow of expenditure to Bristol is significant. A high level of expenditure leakage from certain parts of B&NES is not necessarily undesirable in sustainability terms because parts of B&NES fall within the catchment area of other centres e.g. Keynsham falls within Bristol and Bath's overlapping catchment area. The northern rural area of B&NES is accessible to Bristol and Cribbs Causeway as well as Bath. Therefore, it is unrealistic to expect shopping facilities within B&NES to retain all comparison goods expenditure.

10.28 Company average sales densities (adjusted to include VAT) have been applied to the sales area of retail warehouses in Bath, listed in Table 2A, Appendix A, and a benchmark turnover has been calculated. Again, this benchmark turnover is not necessarily the actual turnover of these stores. Average sales densities are not widely available for comparison shops. Based on our experience across the country average sales densities for high street comparison shops can vary significantly, and can range from between £2,153 and £5,382 per sq m net (£200 to £500 per sq ft). The higher end of this range is usually only achieved by large successful shopping centres, such as Bath, which reflects the higher proportion of quality multiple retailers.

10.29 We have assumed that other comparison sales floorspace within Bath city centre could have an average sales density of £5,382 per sq m net (£500 per sq ft). Within Keynsham, Midsomer Norton and Radstock and local shops within Bath. A lower average sales density of £4,000 per sq m has been assumed to reflect the higher proportion of small independent traders.

10.30 The total comparison goods benchmark turnover of all identified comparison floorspace in B&NES is then £419.91 million, as shown in Table 3A, Appendix A.

10.31 Our assessment suggests comparison goods expenditure available for this floorspace in 2004 is £526.6 million, such that existing comparison sales floorspace is trading above (about 25%) the assumed benchmark turnover. Estimates of available expenditure are summarised and compared with the benchmark turnover in Table 10.2.

Table 10.2: Comparison Trading Levels in 2004 (£M)

Centres	**Available Expenditure**	**Benchmark Turnover**	**Difference**
Bath	477.42	374.35	+103.07
Keynsham	20.54	17.20	+3.34
Midsomer Norton/Radstock	28.64	28.36	+0.28
TOTAL	**526.60**	**419.91**	**+106.69**

Source: Table 2A (Appendix A) and Table3C (Appendix C)

10.32 Overall comparison retail sales floorspace within B&NES District appears to be trading healthily. Comparison floorspace within Bath appears to be trading particularly well (27% above the benchmark). The high trading levels appear to be consistent with low shop vacancy rates within B&NES and high demand for premises within Bath.

Future Spending Growth

Convenience Shopping

10.33 The levels of available convenience goods expenditure in 2007 and 2011 are shown at Tables 7B and 8B in Appendix B, and summarised in Table 9B. These tables assume that the market penetration rates within the study area will change if food store development is implemented in the future. Penetration rates have been amended, as shown in Table 6B, to take current commitments into account as shown in Table 2A, Appendix A. For example the proposed food store at Charlton Road in Keynsham is expected to change shopping patterns in the north west part of the study area. The development of a food store in Keynsham should increase the town's market share of expenditure, particularly in the Keynsham area (Zone 2).

10.34 In addition, the existing outflow of convenience expenditure from Bath urban areas (zone 1) is relatively high (13%) and food stores in Bath are trading above expected levels. Further food store development in Bath should not only help to relieve existing high trading levels, but should also help to claw back expenditure leakage from Bath.

10.35 For these reasons B&NES's existing market penetration of convenience expenditure in certain study area zones has been increased in 2007 and 2011. The future expenditure levels available to retail facilities in B&NES are summarised in Table 9B. Given that the market shares have been increase the floorspace figures within Table 10.3 later in this section should be treated as maximum estimates for planning purposes.

Comparison Shopping

10.36 The assessment of existing shopping patterns in 2004 indicates that the cross flows of comparison goods expenditure into and out of B&NES and the study area is significant; this reflects the overlapping catchment areas of a number of different shopping destinations in the sub-region including Bristol, Cribbs Causeway etc.

10.37 Major retail development in Bath, if implemented, is likely to change existing shopping patterns within the study area in the future and could reduce expenditure leakage. Conversely, improvements to comparison retailing in the competing centres, e.g. Broadmead in Bristol, may increase expenditure leakage from the study area. Therefore, major development proposals in competing towns will limit the ability of shopping facilities in B&NES to increase their market share of expenditure. Nevertheless, on balance, the retention of expenditure in the study area is not expected to reduce in the future, provided that major retail development proposals in Bath continue to be implemented.

10.38 We have assumed that major comparison retail development in Bath can help to increase the level of comparison goods expenditure retention within certain parts of the study area, i.e. the central study area zones (zones 1, 2, 3, 4, 5 and 7). In order to achieve this uplift in expenditure retention, new retail development within Bath will need to significantly improve the range and choice of shopping facilities within Bath. Conversely improvements to comparison shopping provision in competing centres outside B&NES are likely to reduce the level of expenditure attracted to B&NES. Therefore, B&NES market share in the more peripheral parts of the study area have been reduced slightly, i.e. zones 9 and 10 in Wiltshire and zones 11 and 12 in Bristol.

The proportional level of expenditure inflow to B&NES from beyond the study area has also been reduced slightly to reflect these developments, but is expected to increase slightly in actual terms between 2004 and 2007 (+11%), due to growth in population and expenditure per capita.

10.39 We have projected the level of comparison goods expenditure available to shops in B&NES at 2007 and 2011 as shown in Table 4C and 5C in Appendix C, based on existing 2004 penetration rates. Expenditure inflow from beyond the study area has been increased in line with the projected growth in comparison expenditure per capita shown in Table 2B, Appendix B.

Quantitative Capacity for Additional Convenience Floorspace

10.40 The total level of convenience goods expenditure available for shops in B&NES between 2004 and 2011 is summarised in Table 11.3. The benchmark turnover of existing convenience floorspace and future commitments has been subtracted from the estimates of available expenditure, to provide surplus expenditure estimates, as shown in Table 9B, Appendix B.

10.41 The proposed food store within the Southgate centre redevelopment is assumed to have a net sales floorspace of up to 1,000 sq m net (95% convenience sales). It is unclear which operator will occupy this store. If this store is occupied by a high quality operator such as Tesco Metro or Sainsbury's Central, then the benchmark convenience turnover of the store could be at least £9.5 million (£10,000 per sq m net), compared with the existing Somerfield's benchmark turnover of £3.86 million. Therefore, the benchmark turnover of convenience goods facilities in Bath would be increased by £5.64 million at 2007 and 2011, as shown in Table 2A, which has been added to the benchmark turnover of convenience goods retail facilities in Table 9B.

10.42 The food store commitment at Charlton Road in Keynsham is expected to have a net sales area of approximately 2,000 sq m net, of which 90% is assumed to be convenience sales. No operator is identified for this store. If this store is occupied by a high quality operator such as Tesco, Sainsbury's, Waitrose, Asda or Morrisons, then the benchmark convenience turnover of the store could be at least £18 million (£10,000 per sq m net). Therefore, the benchmark turnover of convenience goods facilities in Keynsham has been increased by £18 million at 2007 and 2011.

10.43 At 2011, estimated convenience expenditure is projected to exceed the benchmark turnover by £48.9 million, as shown in Table 9B, Appendix B. This surplus expenditure estimate could, in theory be available to support new convenience sales floorspace, over and above existing commitments.

10.44 The forecast surplus expenditure projections shown in Table 9B have been converted into net sales floorspace projections based on a benchmark turnover density of between £10,000 per sq m net and £11,000 per sq m, as shown in Table 10.3. These figures assume that all surplus convenience expenditure will be accommodated within large food superstores.

10.45 These figures suggest there is quantitative scope for further food store floorspace in B&NES, especially within the Bath area.

Table 10.3: Additional Food Store Floorspace Projections

	2004 to 2007	2004 to 2011
Surplus Expenditure £M		
Bath	30.29	41.27
Keynsham	-1.58	0.86
Midsomer Norton/Radstock	2.69	6.77
Total	**31.40**	**48.90**
Net Sales Floorspace Sq M*		
Bath	2,754 to 3,029	3,752 to 4,127
Keynsham	n/a	78 to 86
Midsomer Norton/Radstock	245 to 269	615 to 677
Total	**2,999 to 3,298**	**4,445 to 4,890**

*average turnover density of £10,000 to £11,000 per sq m net

Quantitative Capacity for Additional Comparison Floorspace

10.46 The growth in comparison goods expenditure available for shops in B&NES between 2004 and 2011 is summarised in Table 6C, in Appendix C. Expenditure projections are based on the assumption that there will be some claw back of expenditure leakage in the central zones of the study area as new development is implemented and increases Bath's retail appeal. Future available expenditure is compared with the turnover of existing and proposed comparison retail facilities within B&NES in order to provide estimates of surplus expenditure, as shown in Table 6C.

10.47 Table 7C assumes that the benchmark turnover of comparison floorspace within B&NES will increase in real terms in the future. There is no recent information on increases in turnover density (URPI's Information brief 1986/6 is the last available data source). However, a growth rate of 1% per annum is widely adopted by retail planners and has been used in this assessment. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

10.48 Allowing for this growth to be absorbed by existing retailers represents a cautious approach to forecasting future needs and this allowance may help existing centres maintain their vitality and viability in the future. It effectively allows for existing retail outlets to increase their turnover to help them to compete with new provision. However, it should be noted that the assessment of existing shopping patterns (2004) indicates that comparison floorspace within B&NES is trading well above the benchmark turnover assumed in this study and an allowance for growth in benchmark turnover is therefore not unrealistic.

10.49 The proposed redevelopment of the Southgate Centre in Bath City Centre is expected to provide approximately 15,000 sq m net additional comparison sales floorspace. The benchmark turnover of this additional floorspace is estimated to be about £90 million in 2007 (based on an average sales density of £6,000 per sq m), as shown in Table 4A.

10.50 The proposed food store in Keynsham (Charlton Road) is assumed to have 200 sq m net of comparison good sales floorspace (10%), and a benchmark turnover of £1 million in 2007.

10.51 The benchmark turnover of comparison goods retail facilities has been increased to reflect these proposed commitments, as shown in Table 6C. The revised benchmark turnovers have been subtracted from available expenditure to provide estimates of surplus expenditure, as shown in Table 10.4.

10.52 The sequential approach suggests that town centre sites should be the first choice for all types of retail development. However, it may not be possible to accommodate all types of development in town centre locations. The sale of some comparison goods may require large showrooms and pick-up and delivery facilities which may be difficult to accommodate within town centres.

10.53 Some comparison goods, such as DIY, hardware, furniture, floor coverings, carpets and electrical goods are often sold within large showroom and retail warehouse type units. These goods normally account for about 35% to 40% of total comparison goods expenditure. We would normally expect about a half of comparison goods expenditure within these categories to be accommodated in retail warehouses, with the remaining half in high street shops. Therefore, we have assumed that up to 20%

of total surplus comparison expenditure could be accommodated in large format stores including retail warehouses, and the remaining 80% will be accommodated in high street comparison shops.

Table 10.4: Surplus Comparison Goods Expenditure

Type	Surplus Comparison Expenditure £M	
	2004 to 2007	2004 to 2011
Bath	**102.57**	**182.69**
High Street Comparison Shops (80%)	82.06	146.15
Large format stores/retail warehouses (20%)	20.51	36.54
Keynsham	**4.19**	**7.33**
High Street Comparison Shops (80%)	3.35	5.36
Large format stores/retail warehouses (20%)	0.84	1.47
Midsomer Norton/Radstock	**4.57**	**9.33**
High Street Comparison Shops (80%)	3.66	7.46
Large format stores/retail warehouses (20%)	0.91	1.87

10.54 Surplus expenditure has been converted into net comparison sales floorspace projections in Table 10.5 to identify the capacity for new floorspace.

10.55 This capacity analysis does not translate directly into identified need; however, the capacity projections suggest that there is significant scope for additional retail development within B&NES in the future, particularly in Bath. Opportunities to accommodate additional retail floorspace are summarised in Section 13.

10.56 The projections assume that comparison shopping floorspace in Bath will trade at benchmark levels in 2011. Therefore, available expenditure over and above benchmark levels in 2011 has been converted into potential new floorspace as shown in Table 10.5. However a judgement needs to be made as to whether it is reasonable to plan for growth that would reduce current trading levels to benchmark levels.

10.57 As indicated earlier in this section, shopping comparison floorspace in Bath is estimated to be trading well above benchmark levels in 2004 (27% above, £477.42 million compared with the benchmark turnover of £374.35 million). Whilst this means that there is in theory surplus expenditure available to support additional capacity, the impact that this reduction in turnover would have should be considered when making allocations for new floorspace in the local plan. The implementation of the Southgate development and any other new floorspace developed in the future will reduce the turnover of existing comparison retail floorspace in Bath, even allowing for a reduction in the amount of expenditure leakage from Bath's catchment area.

Table 10.5: Additional Comparison Floorspace Capacity Projections

Type	Turnover Density £ Per Sq M Net	
	2004 to 2007	**2004 to 2011**
Bath High Street Comparison Shops (1)	6,000	6,244
Other towns High Street Comparison Shops (2)	4,121	4,289
Large format stores (3)	2,500	2,602
Type	**Sales Floorspace Sq M Net**	
	2004 to 2007	**2004 to 2011**
Bath		
High Street Comparison Shops (80%)	13,676	23,407
Large format stores/retail warehouses (20%)	8,206	14,042
Keynsham		
High Street Comparison Shops (80%)	813	1,366
Large format stores/retail warehouses (20%)	335	563
Midsomer Norton/Radstock		
High Street Comparison Shops (80%)	888	1,739
Large format stores/retail warehouses (20%)	364	719
Type	**Gross Floorspace Sq M**	
	2004 to 2007	**2004 to 2011**
Bath		
High Street Comparison Shops (80%)	19,538	33,438
Large format stores/retail warehouses (20%)	9,654	16,520
Keynsham		
High Street Comparison Shops (80%)	1,162	1,952
Large format stores/retail warehouses (20%)	394	662
Midsomer Norton/Radstock		
High Street Comparison Shops (80%)	1,269	2,484
Large format stores/retail warehouses (20%)	428	846

(1) Average turnover density of £6,000 per sq m at 2007 inflated 1% per annum up to 2011.
(2) Average turnover density of £4,000 per sq m at 2004 inflated 1% per annum up to 2011.
(3) Average turnover density of £2,500 per sq m at 2007 inflated 1% per annum up to 2011.
(4) 70% net to gross floorspace for high street comparison shops.
(5) 85% net to gross floorspace for large format stores.

Impact of the Southgate Development in Bath

10.58 The projections in Table 10.5 assume that the Southgate development will be implemented by 2007, and the floorspace figures are over and above the new floorspace provided by this development. However, we understand that the opening date for the development may now be spread over the period 2007-2009. Allowing time for the development to achieve settled trading levels it would therefore be more appropriate to assess the developments impact at 2011, rather than 2007.

10.59 We forecast that comparison shopping facilities in Bath will attract £677.7 million of comparison goods expenditure by 2011; of this about £93.7 million is expected to be taken by the additional floorspace provided within the Southgate development, which leaves about £584 million for existing comparison floorspace within Bath. This residual turnover at 2011 (with Southgate implemented) is still well above the adopted benchmark turnover for existing comparison goods facilities in Bath (about £401 million in 2011). The 2011 residual turnover (£584 million) is also much higher (22%) than 2004 trading levels in Bath (£477.4 million). Therefore, growth in comparison goods expenditure between 2004 and 2011 is expected to more than offset trade diversion and impact caused by the Southgate development.

Impact of Implementing Additional Capacity

10.60 The projections for 2011 indicate that existing comparison facilities in Bath, even allowing for the Southgate development, will be trading well above the benchmark turnover (£182.7 million). This high trading performance produces surplus expenditure at 2011, which could be available to support new comparison floorspace in Bath over and above the Southgate development. Without the Southgate development the surplus would be £276.4 million in 2011.

10.61 If the total additional comparison floorspace projections, set out in Table 10.5, are implemented by 2011 along with the Southgate development, then the residual turnover of existing comparison shopping facilities in Bath is expected to reduce to the benchmark figure (£401 million), which is about 16% lower than current 2004 trading levels (£477 million). Therefore the cumulative impact of Southgate and all of the additional floorspace projections at 2011 would result in a significant reduction in the current turnover for existing retailers. Existing comparison facilities are trading very healthily and should be capable of withstanding a significant reduction in trade. Nevertheless, this may not be desirable and the impact of further development over and above the Southgate development should be considered carefully and monitored closely as development comes forward. For these reasons we believe the floorspace projections shown in Table 10.5 should be viewed as maximum projections.

10.62 To assist in the judgement of how much quantitative need there is in B&NES, future surplus expenditure has been assessed in terms of that which is derived from projected growth, clawback or that which is derived from reducing high trading to benchmark levels. This analysis has only been made for Bath since this is from where the majority of the capacity is derived.

Table 10.6 Breakdown of Surplus Comparison Goods Expenditure (Bath)

	2004 – 2011 £ m	2004 – 2011 (1) £ m	% of Capacity
Growth in available expenditure (Bath)	175.5	94.2	51.5%
Projected clawback of expenditure leakage	24.8	12.4	6.8%
Overtrading available expenditure	76.1	76.1	41.7%
Total	276.4	182.7	100%
Expenditure Growth			
High Street Comparison (80%)	n/a	75.4	41.2%
Large Format/retail warehouse (20%)	n/a	18.8	10.3%
Clawback			
High Street Comparison (80%)	n/a	9.9	5.4%
Large Format/retail warehouse (20%)	n/a	2.5	1.4%
Reduction in Trading Levels			
High Street Comparison (80%)	n/a	60.9	33.3%
Large Format/retail warehouse (20%)	n/a	15.2	8.3%

(1) Southgate expenditure of 93.7 million added at 2011

10.63 A substantial proportion (58%) of the identified capacity is required just to meet need arising from growth in expenditure and population, and to allow for some degree of reduction in expenditure leakage.

10.64 In floorspace terms, this equates to a requirement in Bath in addition to Southgate of 13,700 sq m net of high street comparison shops by 2011 and 8,200 sq m net of large format floorspace. These floorspace need projections should therefore be regarded as minima if Bath is to plan positively for future need.

10.65 The range derived from this projected scope (Table 10.7) should be regarded as broad guidance on future provision, and must be considered in conjunction with qualitative requirements – how new floorspace might complement and reinforce centres rather than compete – and the consequential impact(s) on existing centres and their constituent retailers and other occupier uses. This qualitative assessment will assist in deciding to what extent new retail floorspace will be acceptable at the upper end of this range.

Table 10.7 Projected Maximum and Minimum Comparison Floorspace Need in Bath (2011)

	Minimum floorspace requirement (sq m net)	Maximum Floorspace Capacity (sq m net)
Bath High Street Comparison	**13,700**	**23,400**
Bath Large Format	**8,200**	**14,050**
Bath Total	21,900	37 450

Occupier Demand

10.66 Whilst these floorspace projections set out in this section provide an indication of the theoretical scope for new retail development based on expenditure projections, it is also necessary to relate this to consider the potential level of current demand from operators for new floorspace within B&NES.

10.67 A postal questionnaire was sent to around 250 national and regional multiple retailers, in order to ascertain their potential space requirements in B&NES. The results are contained in Appendix D. This canvas of operators confirms that there are 42 operators with space requirements in Bath, including 11 operators who suggested they would all consider opportunities within the three other smaller towns.

10.68 Multiple retail operators' space requirements across the country are often publicised. At present there are 137 published requirements registered for floorspace in Bath, as shown in Appendix D. There are 6 published requirements each in Keynsham and Midsomer Norton, but no requirements in Radstock.

10.69 The Retail Focus database and our own canvas of operators indicate there is strong demand for retail space within B&NES, primarily concentrated in Bath. Large-scale confirmed requirements include:

- House of Fraser 150,000 sq ft;
- B&Q 45,000 sq ft;
- Wickes DIY 60,000 sq ft;
- Toys R Us 30,000 sq ft;
- Halfords 7-10,000 sq ft;
- Staples 10-17,500 sq ft;
- Pets at Home 4-10,000 sq ft; and
- Waitrose up to 60,000 sq ft.

10.70 There is significant demand from retail warehouse operators in Bath looking for out-of-centre premises given the lack of current provision in the District. There is also demand from discount food operators since this sector is currently underrepresented.

10.71 A number of pub/restaurant chains and takeaways have a requirement in Bath including Whitbread, Starbucks, Costa Coffee, Café Nero, Burger King, Pizza Hut, and McDonalds.

10.72 This can only represent a snapshot of demand in 2004 as new requirements and formats will emerge and as retailers refine their trading strategies. In particular, the selection of a suitable retailer for the anchor unit in the proposed Southgate scheme (or any other major change in retail provision or opportunities) will have an effect on the market perception of Bath and the mix of occupiers seeking to achieve representation or to amend existing stores/locations.

11.0 QUALITATIVE NEED FOR RETAIL DEVELOPMENT

Introduction

11.1 This section assesses the qualitative need for retail development in B&NES and considers the adequacy of existing shopping facilities within B&NES to meet the current needs of various customer groups.

11.2 Ministerial statements and draft PPS6 suggest that the need for retail development can be quantitative or qualitative, although more weight is given to quantitative need. Quantitative need relates to demand in terms of available expenditure. This form of assessment has been undertaken and is set out in Section 10.0. This quantitative assessment has been supported by the qualitative assessment of the range and scale of existing shopping facilities in B&NES set out in this Section.

11.3 The ability of existing facilities to meet the needs and aspirations of each customer group can be examined in a number of ways, for example:

- the quantity (number of outlets and level of floorspace);
- the range of facilities in terms of mix, quality and price; and
- the location and accessibility of shopping facilities.

11.4 These factors are interrelated. For example, B&NES has a significant number of shops but these are not evenly spread throughout the area and there are some specific retail sectors poorly represented.

New Forms of Retailing

11.5 New forms of retailing have emerged in recent years as an alternative to more traditional shopping facilities. For example, factory outlet centres have been developed across the country as a supplement to fashion shops within town centres. These developments are usually large and can provide over 10,000 sq m of comparison retailing, focusing primarily on fashion items and clothing, offering designer clothing at discounted prices. A number of large factory outlet developments have emerged across Great Britain and draw from a wide catchment area, for example the Great Western Outlet Village in Swindon and Clark's Village in Street.

11.6 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the Internet. Trends within this sector may well have implications for retailing within B&NES. Therefore, it will be necessary to carefully monitor both the growth within this sector particularly in the long term and the effect that it may have on diverting expenditure that might otherwise be spent in shops.

11.7 In broad terms home/electronic shopping is classified by Experian as *"special forms of trading"*, which also includes other forms of retail expenditure not spent in shops e.g. mail order. Special forms of trading have been excluded from the quantitative capacity analysis within this study.

11.8 The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. However, there is no clear evidence of the likely extent of this growth in the long term.

11.9 This study does not assume that there will be a significant increase in home shopping over the next decade, although the possibility is recognised. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

11.10 On-line shopping has experienced rapid growth since the late 1990's but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure. However, it is still in its infancy, and there is uncertainty about its longer-term prospects. Verdict Research project that online retail sales will grow to 5.6% of retail sales by 2006, of which 40% will be online grocery sales. However, if this growth is achieved it may (to a large extent) be at the expense of other forms of home shopping such as catalogue and mail order shopping. In addition the implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales may not always mean there is a reduction in the need for retail floorspace.

11.11 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. For example, extended opening hours and Sunday trading increased significantly in the 1990's. Retailers also responded to stricter planning controls by changing their trading formats. For example, some major food operators have introduced smaller store formats capable of being accommodated within town centres, such as the Tesco *Metro*, Sainsbury's *Central/Local* store and Marks and

Spencer's *Simply Foods* formats. Food operators have also entered the local convenience store market, for example *Tesco Express* store and convenience stores linked with petrol filling stations. The entrance of European discount food operators such as Aldi, Lidl and Netto has also been rapid during the last decade.

11.12 Food store operators have also commenced a programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have attempted to increase the sale of non-food products within their food stores, including clothing and electrical goods.

11.13 Comparison retailers have also responded to recent market conditions. The bulky goods retail warehouse sector has rationalised and there have been a number of mergers. For example, there are fewer DIY operators following the acquisition of Do It All, Great Mills and Wickes by Focus DIY and Homebase's takeover of Texas. B&Q and Homebase have developed very large *'category killer'* retail warehouses (some exceeding 10,000 sq m gross). Other traditional high street retailers have sought large out-of-centre stores, for example Big W (Woolworth), Boots, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the country. Sports clothing retail warehouses including JJB Sports and Decathlon have also expanded out-of-centre. These trends have already been evident across the Country.

11.14 Within town centres, some high street multiple comparison retailers have also changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq m-2,150 sq ft) with an increasing polarisation of activity into the larger regional and sub-regional centres. The continuation of these trends may also influence future operator requirements in B&NES. Some town centres may have limited sites suitable for larger stores and there are conservation and design issues that may affect the alteration of shop premises to provide larger units. Operator demand for floorspace may continue to be concentrated within the major centres i.e. Bristol, Bath and Swindon, rather than in smaller centres. Demand for retail floorspace within small centres such as Keynsham, Midsomer Norton and Radstock is likely to be particularly limited, as suggested by current operator requirements.

Identification of Customer Groups

11.15 The surveys conducted by Research and Marketing in 2000 and NEMS in 2004 indicate that there are a number of different customer groups which benefit from the use of shops and services within B&NES, as shown in Table 11.1. The visitor survey in Bath City Centre suggested that approximately 23% of visitors to Bath City Centre do not live within the local area (i.e. the study areas). Tourism was the main purpose for visiting Bath for approximately 10% of visitors, and 16.5% of visitors' main purpose for visiting was work/business. This information suggests that retail trade from tourist visitors and commuters is important to the City Centre and the local economy.

Table 11.1: Customer Groups in B&NES

Customer Type	Survey Comments
Residents within the study area	Most visitors to the four centres live in B&NES i.e. Bath 77%, Keynsham 89%, Midsomer Norton 94% and Radstock 86%.
Those who work in B&NES	Between 6% to 10% of visitors to the three smaller centres work in the towns. 16.5% of visitors work in Bath.
Tourist Visitors	Bath attracts tourist from across the UK and abroad. Approximately 10% of visitors in Bath City Centre indicated they were tourist visitors. Bath is on the main tourist route for international visitors.

Sources: NEMS Visitor Survey 2004

The Size of Customer Groups

11.16 The relative size of each customer group can be estimated in terms of the numbers of visits made per annum. The existing resident population within the study area is approximately 433,000 (180,000 households). If each household makes on average at least two food and grocery shopping trips per week and one non-food shopping trip per week, then the study area population would generate approximately 28 million shopping trips per year (19 million food and grocery trips and 9 million non-food trips).

11.17 Our assessment of existing shopping patterns suggests that B&NES attracts about 35% of food and grocery expenditure in the study area, and 39% of non-food (comparison) expenditure. Therefore, B&NES could attract about 10 million shopping trips per annum from local residents within the study area.

11.18 The West County Tourist Board estimated that B&NES attracted 6.2 million tourist visitors in 2001 (734,000 staying visitors and 5.43 million day visits). The Roman Baths alone attracted 865,000 visitors in 2001. Tourist visitors to B&NES would, on average, add an additional 22,000 people to B&NES's population each day. In terms of shopping expenditure, WCTB estimates that tourist visitors spent over £92 million during their trips to B&NES in 2001, or about £11 per visitor per day. A further £86 million was spent on food and drink, and £28 million on attractions/entertainments.

11.19 The number of tourist visitors to B&NES and their shopping expenditure are significant. However in proportional terms, shopping trips generated by local residents are more important to the vitality and viability of the City Centre and other shopping facilities within B&NES.

11.20 Local residents will generally want access to all forms of shopping, although more affluent households may be more selective and may be prepared to travel further for certain types of shopping. For example, local residents may choose to shop in Bristol, Cribbs Causeway or at Cheltenham.

11.21 Workers in B&NES will have different needs focusing on lunchtime purchases, food and convenience products and gifts and speciality purchases. They will expect suitable facilities near to their place of work. Their needs should be catered for in the main employment and tourist centres.

11.22 Shopping visitors including tourists may expect to find a good range of comparison shops, in particular fashion, arts crafts and gift shops, within or near the key tourist destinations, such as the Pump Rooms and Abbey in Bath City Centre. These shopping facilities will also need to be supported by other facilities such as cafés, restaurants and bars.

Food and Grocery Shopping

11.23 Most households tend to undertake two kinds of food and grocery shopping trips, i.e. a main shopping trip made once a week or less often and top-up shopping trips made more frequently. The survey results confirm that most households in the study area do undertake both main and top-up trips. The survey also indicates that many households purchase food and groceries in bulk. Approximately 13% of households in the study area do their main food shopping once a fortnight or less often. Only 17% of households do their main food and grocery shopping more than once a week. Approximately 86% of household travel by car for their main food shopping.The availability of a wide range of products and car parking is therefore important for bulk food shopping trips. Large food superstores, preferably 2,322 sq m net or more (25,000 sq ft), are the usual destination for these types of shopping trip. There are four food stores of this size within B&NES, Sainsbury's and Safeway in Bath, Radco in Radstock and Tesco in Midsomer Norton. Keynsham is the only town without a food superstore, although it has a number of large stores nearby in Bristol and an out-of-centre Coop supermarket. The household survey results confirm that a high proportion of households within B&NES do most of their main and top-up shopping within B&NES.

11.24 The level of accessibility to shopping centres/stores, in terms of the convenience to the home or work, is an important consideration for customers. The distance (or time) customers are prepared to travel for each type of shopping will vary. For example, residents in the main towns might reasonably expect to have easy walking access to local shops (for daily top up purchases). Employees working within or near the town centres may also expect to find shopping facilities within easy walking distance to meet their lunchtime needs.

Bath

11.25 Residents in Bath have the choice of two large food stores (over 2,000 sq m) and four medium size supermarkets of between 800 sq m net and 1,600 sq m net. Most areas of Bath are within 2 kilometres of the three largest stores, Sainsbury's, Safeway and Waitrose, but residents in the southern part of Bath City are less well served.

11.26 The quantitative assessment set out in Section 10.0 suggests that large stores in Bath are currently trading about 10% above the benchmark turnover. The Sainsbury's and Waitrose stores estimated to be trading well above their company averages. Such high levels of trading can be an issue for customers. For example, if food stores are trading heavily they can become congested and unpleasant places to shop at peak times. The availability of sufficient car parking spaces can also be a problem.

11.27 Our assessment of food and grocery shopping patterns within the study area set out in Section 10.0 suggests that about 13% of convenience goods expenditure currently leaks from Bath (Zone 1), particularly to Bristol (e.g. Asda at Longwell Green). New food store development in Bath could help to reduce high trading levels in existing food stores and to reduce the outflow of expenditure from Bath.

Keynsham

11.28 The out-of-centre Co-op store in Keynsham is a reasonably large food store (2,369 sq m net) and offers a good range and choice of products. However, the survey results suggest the store does not attract a significant proportion of bulk and main food shopping trips from the Keynsham area. The Somerfield and Iceland stores within the town centre are more limited in size and cater primarily for basket shopping.

11.29 The quantitative assessment in Section 10.0 suggests that existing food stores in Keynsham are trading about 9% below their benchmark turnover. However, a high proportion of convenience expenditure (58%) is estimated to leak from the Keynsham areas (Zone 2), primarily to large food stores in Bristol (50%) and in Bath (4%). Tesco at Brislington and Asda at Longwell Green attract over 60% of main food shopping trips from Keynsham as these large superstores are only two to three kilometres from residents in Keynsham. It is likely that residents within the Keynsham area will continue to use these large food stores in Bristol in the future but the high level of expenditure leakage and limited food store provision in Keynsham may provide scope for a further food store in Keynsham.

11.30 Our assessment suggests there is both quantitative and qualitative scope to support the proposed Charlton Road food store in Keynsham. Our figures suggest that there should be quantitative scope to support this store by 2011, provided that the development can reduce expenditure leakage from 58% to about 40%.

Norton Radstock

11.31 There are two large food stores (over 2,000 q m net) in the Midsomer Norton/Radstock area, i.e. the Tesco store at Paulton and the Radco at Radstock. However, about half of the Radco store's sales floorspace is devoted to the sale of comparison goods and this store does not attract a significant share of main food shopping trips. The household survey results suggest that the Tesco store attracts a high proportion (73%) of main and bulk food shopping trips within the local area (Zone 3), whilst the Radco appears to rely more on top-up shopping trips.

11.32 The Safeway in Midsomer Norton provides a good range of products and has ample surface car parking. This store, along with the Tesco store, caters for the bulk food shopping needs of residents in the southern area of B&NES. The Somerfield (now closed) and Lidl stores in Midsomer Norton cater for basket shopping and the discount sector of the market.

11.33 Our analysis of shopping patterns based on the household survey suggests that the retention of main food shopping trips in Norton Radstock (Zone 3) is high (93%). The Tesco store is estimated to be trading well above the company average. Proposals to extend the Tesco, if approved and implemented, would meet the quantitative scope for food store development in the short to medium term.

Comparison Shopping

11.34 Bath City Centre and the other three town centres and local centres within B&NES together provide a good range of comparison shops. The centres have a large number of small independent retailers that provide specialist shopping and support the multiple retailers within Bath. There is a reasonable range of lower cost comparison shopping facilities in the three smaller centres. The number of multiple retailers within Bath is not comparable with those available in Bristol (Broadmead and The Mall at Cribbs Causeway). The comparison multiple retailers in Bath City Centre, Bristol Broadmead and Swindon Town Centre are listed in Appendix E.

11.35 The fashion emphasis in Bath is confirmed by the higher number of fashion retailers than in Swindon and a comparable number to Bristol Broadmead. Bath has stronger representation of high quality fashion retailers (e.g. Austin Reed, Jaeger and Country Casuals) and fewer discount clothing shops (e.g. Primark, TK Maxx and Peacocks). Bristol and Swindon have more department/variety stores, for example, with two large department stores and Littlewoods variety stores.

11.36 Bath has many of the more mainstream and upmarket high street fashion stores and national multiple retailers but lacks a large department store (over 10,000 sq m) and has a shortage of larger units (200 sq m plus). In addition many of the mainstream retailers in Bath occupy premises that a too small to provide the normal range and choice of products offered by these retailers in other large shopping centres.

11.37 Currently 78% of of the units in the citry centre are less than 1,000 sq ft (93 sq m) compared to a UK average of 41% of units.

11.38 The historic fabric of Bath means that it is unlikely that existing floorspace can be re-configured to provide larger units.

11.39 The survey of retail operator's requirements revealed that the majority or retailers requiring city centre locations had a requirement of between 1,000-2,500 sq ft (93-232 sq m).

11.40 The consequence of a lack of suitable unit sizes is that both retailers and shoppers will consider opportunities to locate and shop in other centres where more appropriate floorspace is available, thus leakage will continue and may increase.

11.41 The household survey results suggest that some local residents within Bath's catchment area do at least some of their comparison shopping in competing centres, in particular Bristol. Residents may be prepared to travel further for higher order comparison goods such as fashion, furniture or electrical goods. The street survey demonstrates that residents tend to visit a diverse selection of shopping areas both within and outside B&NES, as shown in Table 11.5.

11.42 Given the scale, quality and range of shopping facilities available in Bristol and Cribbs Causeway, the outflow of comparison shopping trips is likely to continue in the future, regardless of the provision of new comparison shopping facilities in Bath. Bristol and Cribbs Causeway serve regional catchment areas that overlap Bath's catchment area.

11.43 It is important to consider however, that there are improvements and expansions planned for Bristol which will compete with Bath. Planning permission has been granted for comprehensive redevelopment of the Broadmead shopping area of Bristol, subject to a confirmed CPO, which is anticipated to be completed by Spring 2008.

11.44 The redevelopment is anticipated to provide an additional 40,500 sq m gross of general comparison goods floorspace. This is projected to meet approximately 75% of the predicted growth in available expenditure in Bristol's catchment area.

11.45 If Bath did not plan for further retail growth, then this improvement to retail provision in Bristol would be likely to increase the expenditure leakage from B&NES, and potentially reduce the current high inflow levels into Bath.

11.46 The redevelopment of the Southgate Centre would off-set some of this potential trade diversion to Bristol, but on its own would be in-sufficient to also claw back some of the existing expenditure leakage during the plan period.

Table 11.2: Other Non-Food Shopping Destinations

Centres	% of Visitors in Each Centre			
	Bath	Keynsham	Midsomer Norton	Radstock
Bath	N/A	34%	49%	44%
Keynsham	3%	N/A	7%	5%
Midsomer Norton	3%	2%	N/A	48%
Radstock	2%	*	10%	N/A
Bristol	28%	35%	18%	16%
Cribbs Causeway	11%	8%	3%	2%
Chippenham	5%	1%	1%	*
Trowbridge	13%	2%	8%	13%
Swindon	3%	*	*	1%
Longwell Green	3%	18%	3%	2%
Kingswood	2%	6%	*	1%
Frome	2%	*	9%	9%

Source: Research & Marketing Visitor Surveys 2000

NB: - figures add to more than 100% because more than one centre was mentioned by some respondents.

11.47 There is a clear qualitative deficiency in the unit size of floorspace available in the city centre with a lack of large format space. This in turn limits the range of occupiers who can take up space in the town, hindering those wanting to be represented in the City but who require large units.

11.48 In order for Bath to reduce its current high levels of leakage, this qualitative need for modern floorspace should be taken into account when allocating and permitting retail floorspace within the floorspace range idenitied in Section 10.0.

Retail Warehouses and Large Format Stores

11.49 As indicated earlier, the retention of bulky goods shopping expenditure in B&NES and the study area as a whole is lower than for other comparison shopping. Residents within B&NES have a more limited choice of retail warehouses than for other forms of comparison shopping, particularly when compared with other nearby towns, e.g. Bristol, Trowbridge and Chippenham. There is only 11,000 sq m net of retail warehousing in B&NES, as shown in Table 2A, Appendix A, compared with over

30,000 sq m in western Wiltshire and 20,000 sq m in east Bristol (i.e. parts of Bristol within the study area).

11.50 The lack of large suitable sites in Bath in the past has restricted the number of retail warehouses/large format stores. The limited development of large stores has led to a high number of independent bulky comparison shops within the local centres throughout Bath e.g. hardware, furniture and carpet shops and builders merchants. However, the significant range and scale of retail warehouses/large format stores adjacent to B&NES in east Bristol, Trowbridge and Chippenham attracts shoppers from B&NES and there is a reasonably high level of expenditure leakage from Bath to retail facilities in these competing centres.

11.51 This high level of leakage suggests that there is demand for further bulky goods retail provision in B&NES. Based on this qualitative need, it would be acceptable to provide bulky goods floorspace at the upper end of the floorspace range identified in Section 10.0.

Local Shops and Services

11.52 The existing provision of local shopping centres within Bath and other centres offers a balanced distribution throughout B&NES. Most parts of Bath urban area are within walking distance of a local centre. The 25 district and local centres in Bath also provide a significant range of comparison shops which complement the City Centre. These centres have large number of comparison shops and convenience shops and account for a significant proportion of shops and services in Bath.

11.53 The network of local centres should be maintained and enhanced to ensure that residents have easy access to local shops and services. There will be scope for improving some of the local centres in B&NES, particularly those that suffer from relatively high vacancy rates and poor environmental conditions. The comparison goods retail expenditure projections with this study assume that local shopping facilities within B&NES can increase their turnover in real terms. However, the reoccupation of vacant floorspace or the development of new floorspace in local centres would need to be subtracted from the floorspace projection set out in Section 10. Therefore, some allowance for additional retail floorspace within local centres, particularly in Bath urban area should be taken into account.

11.54 The provision of further convenience and comparison shopping within these centres would help to secure their viability, although this additional provision would only meet a small element of the scope for new retail development.

12.0 THE NEED FOR COMMERCIAL LEISURE DEVELOPMENT

Introduction

12.1 As indicated in the summary of government guidance within Section 2, Draft PPS6 will require Councils to undertake assessments of need for other non-retail town centre uses, i.e. commercial leisure and office development. This Section of the study assesses the commercial leisure needs of B&NES.

12.2 This section assesses the need and potential for commercial leisure development in B&NES. We have considered the potential for improving a range of commercial leisure uses including; cinema/multiplex, ten pin bowling, bingo, nightclubs, private health and fitness clubs, casinos and catering, pubs and bars.

Commercial Leisure Trends

12.3 The demand for commercial leisure facilities has increased significantly during the last 20 years. The growth in the commercial leisure sector was particularly strong during the late 1980's and again in the mid 1990's. Average household expenditure on leisure services increased in real terms by 93% between 1984 and 1995 (source: Family Expenditure Survey). Average household expenditure on leisure services increased by a further 36% between 1995 and 2001.

12.4 On average, residents within the Study Area spend nearly £1,300 per annum on leisure activities and services (source: Experian), as shown in Table 12.1.

Table 12.1: Expenditure on Selected Leisure Services (2002)

	Average Annual Expenditure Per Person
Recreational and sporting services	**£80**
Cultural services	**£176**
Games of chance	**£111**
Restaurants, café meals and drinks	**£899**

Source: Experian

12.5 Experian Business Strategies forecast that expenditure on leisure services will increase by 1.1% per annum, which would result in an 8% increase between 2004 and 2011, and a 14% increase between 2004 and 2016.

12.6 The mid-1990s saw the expansion of major *leisure parks.* These leisure parks are generally anchored by a large multiplex cinema and offer other facilities such as ten-pin bowling, bingo, nightclubs, health and fitness clubs, themed destination restaurants, pub/restaurants, nurseries and budget hotels. Commercial leisure facilities have typically been located on the edge of town centres or out-of-centre, with good road access. Many leisure uses have also emerged on retail warehouse parks. Examples of major leisure parks are available in Bristol (Aspect Leisure Park, Avonmeads Leisure Park Cribbs Causeway and Hengrove Leisure Park), Swindon (Shaw Ridge Village and Greenbridge Leisure Park), Taunton (Taunton Riverside) and Yeovil (Yeo Vale Leisure Park). A summary of facilities within leisure parks in Bristol and Swindon is shown in Table H1 in Appendix H.

12.7 The cinema market remains an important sector because cinemas often anchor leisure developments, providing footfall for other uses. However, growth in this sector has slowed significantly in recent years with many areas reaching saturation levels. Many cinema operators have suspended or curtailed their expansion plans. The expansion of other sectors has slowed, including ten-pin bowling and bingo. However, other sub-sectors have remained strong in recent years , in particular the private health and fitness market, with a number of multiple operators seeking premises across the UK, e.g. LA Fitness, Fitness First and Esporta. Nevertheless, the health and fitness sector is also reaching saturation point in some areas.

12.8 The Government is proceeding with plans to reform and laws regulating gambling. These reforms will remove the need for casinos and bingo halls to operate as private clubs with a statutory interval between membership and play. These changes are expected to widen consumer choice and may increase development activity, particularly in the casino sector.

Catchment Potential

12.9 In general, commercial leisure facilities will draw the main part of their trade from residents within a 20 minutes' drive time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres, ice rinks and family entertainment centres require a large catchment population and often benefit from locating together on large out of centre leisure parks.

12.10 Bath has a potentially large catchment population. There are over 430,000 people within the defined study area. However, residents within this area already have good access to major leisure facilities in other towns, i.e. Swindon and Bristol. The proximity of major leisure facilities in Bristol and Swindon will limit the catchment area and potential for major leisure facilities within B&NES.

12.11 Many residents within the study area have good access to other towns outside the District. Therefore residents within the peripheral parts of the study area will have the choice of visiting major leisure facilities in these respective towns, and it is unlikely that all residents will look to towns in B&NES for major leisure facilities.

The Cinema Market

12.12 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s but have increased steadily since 1984. Total admissions in 2002 were 176 million, the highest figure since 1971. The annual average growth in admissions since 1990 has been 5% per annum.

12.13 Since 1990 the number of cinemas has decreased from 737 to 668 sites, but the number of screens has increase from 1,685 to 3,258, a growth rate of 5.6% per annum. Multiplex cinemas now dominate the market with nearly 68% of available screens in 2002. The number of annual admissions was 54,000 visits per screen in 2002.

12.14 The UK cinema industry is now in a period of consolidation after this rapid growth during the 1990's. Dodona Research predicts that the growth in admissions will slow over the next few years. Total admissions are expected to increase to 195 million by 2007, (Cinemagoing 11), an average growth rate of 2.1% per annum. Operators' plans for new cinemas are at a very low level. However, despite the current slowdown in development, JHD Advisors predict that the number of screens will increase by 800 by 2010 and admissions will reach 230 million.

12.15 Cinema provision in B&NES is limited, with only three small cinemas with a total of six screens and 1,244 seats. In comparison Swindon has two large multiplex cinemas with 19 screens and 3,937 seats. There is an excellent provision of multiplex cinemas in Bristol as shown in Appendix H. The catchment area of cinema facilities within B&NES will be restricted by the proximity of these major multiplexes. Residents within the north west part of the study area (Zones 11 and 12) are most likely to visit multiplex cinemas in Bristol rather than travel to Bath.

12.16 The current and future demand for cinema admissions within the study area has been assessed using national visitation rates and applying these to the resident market population in the study area, as shown in Table 12.2. Dodona's national forecasts for visits per person from 2001 to 2007 have been adopted. Growth in visits per person beyond 2007 have been assumed to grow at 2.6% per annum, based on a continuation of Dodona's annual growth rate between 2004 and 2007.

Table 12.2: Forecast Demand for Cinema Screens and Seats

Year	Study Area Population (excl. zones 11 & 12)	Visits Per Person Per Annum	Total Visits Per Annum (millions)	Optimum No. Screens (1)	Optimum No. Seats (2)
2001	353,750	2.66	0.941	13	3,137
2004	363,335	3.04	1.105	15	3,682
2007	372,830	3.28	1.223	16	4,076
2011	380,783	3.63	1.382	18	4,607

Source: Dodona Research. Growth in admissions per person after 2007 assumed at 2.6% per annum.

Notes: (1) assumes 75,000 visits per annum per screen and (2) assumes 300 visits per seat per annum

12.17 Based on national visitation rates, the study area population (excluding the Bristol Zones 11 and 12) is currently capable of supporting 15 screens or 3,682 cinema seats in 2004. Existing provision within the study area (i.e. Bath, Chippenham and Frome) is only 9 screens and 1,978 seats. These figures suggest that approximately half of the demand for cinema seats is currently catered for outside the study area, i.e. in Bristol and Swindon.

12.18 The projections suggest the study area could support 9 additional screens (2,629 seats) by 2011, over and above the existing provision in the study area. However, it is unrealistic to assume that all this potential demand can be accommodated within B&NES because of the proximity of large multiplex cinemas in Bristol and Swindon, and proposal for cinema development in West Wiltshire. If B&NES can attract 60% of the projected cinema trips as shown in Table 12.2 (829,000) at 2011, there would be scope for 11 screens or 2,763 seats in B&NES.

12.19 The multiplex cinema currently under construction within the Kingsmead Leisure Scheme in Bath is expected to provide 6-screen Odeon multiplex with 1,578 seats. We understand that the existing Odeon and Robins cinemas in Bath will close following completion of the Kingsmead development, a loss of 4 screens and 978 seats. Allowing for the loss of these existing facilities, the projections up to 2011 suggest there is scope for 9 screens or about 2,500 seats within B&NES by 2011. The proposed Kingsmead multiplex will accommodate a significant proportion of this potential. However, there may be potential for further cinema provision in the long term, probably after 2011. However, in the short term (up to 2007) there is only limited scope for additional cinema provision over and above the Kingsmead development. The success of the Kingsmead development will need to be carefully monitored.

Private Health and Fitness Clubs

12.20 The UK health club market has expanded rapidly as public awareness about personal fitness has increased. There are an estimated 5.8 million (9.9% of the population or 5.7% for the private sector) public and private health and fitness members (source: Business in Sport and Leisure 2003-2004 Handbook). This compares with 13.5% of the US population. The household survey results suggest that 28% of households use health and fitness facilities, which suggests the participation rate is high within the study area.

12.21 There are 2,300 public and 1,900 private health clubs in the UK ranging from small independent clubs to large operators such as Cannons, David Lloyd, Esporta, Fitness First, Holmes Place, Livingwell and LA Fitness. The large branded operators have over 600 clubs, accounting for 47% of the total UK membership. In 1999, 155 new health clubs opened and 172 opened in 2001. Over 900 new clubs were under construction or with planning permission in 2003.

12.22 Private health clubs had 3.4 million members in 2002 (1,750 members per club). Large health clubs can have memberships of approximately 4,000 people. However, the UK market is still dominated by independent clubs.

12.23 The major expansion of health clubs in recent years has led to an over-supply of clubs in some areas, particularly near major workplaces. The competition for sites has increased. However, Mintel expects the turnover of private health clubs to more than double between 1999 and 2007, i.e. to over £2.8 billion in 2007.

12.24 There are eleven health club operators in B&NES, most of which are a number of small private health and fitness or linked to hotels, as follows:

- LivingWell Health Club, Hilton Hotel in Bath;
- Phase One, Bath;
- Genesis Lifestyle Centre, Bath;
- YMCA Heath & Fitness Suite, Bath;
- Milo Fitness & Leisure, Bath;
- The Pilates Wellbeing Centre, Bath;
- Baskerville Gymnastics & Fitness, Bath;
- En Forma, Keynsham;
- Centurian Hotel, Midsomer Norton;
- The Works, Midsomer Norton;
- High Energy Fitness Studio, Midsomer Norton; and
- Body II Body, Radstock.

12.25 In addition to these private leisure/entertainment facilities, there are four local authority owned sports centres with fitness rooms and multi-purpose gymnasium, i.e. South Wansdyke LC in Midsomer Norton, Keynsham LC, Bath Sports & Leisure Centre and Culverhay Sports Centre in Bath.

12.26 B&NES has a population of over 173,000 in 2004, which could generate demand for about 17,000 public and private membership places, based on the national average membership rate (9.9%). Therefore, the potential demand for health club membership appears to be significant. Furthermore, Esporta Health and Fitness Clubs have a potential requirement for large new health club facilities in Bath (source: Focus).

12.27 The Kingsmead Leisure Scheme, now under construction, includes a large private health club with a floor area of over 2,200 sq m and may meet this latent demand.

Tenpin Bowling

12.28 Tenpin bowling grew quickly in the UK in the 1960s. However, the complex scoring system, lack of investment and the deterioration of facilities exacerbated a significant decline in the 1970s. However, a resurgence of interest in tenpin bowling during the late 1980s and computer scoring led to a second boom. There are now 260 tenpin bowling centres (5,600 lanes) in the UK, approximately one lane per 10,000 people. The tenpin bowling sector has experienced steady growth in recent years, 13% real growth between 1997 and 2002. Mintel predicts the value of the tenpin bowling market will increase from £245 million in 2002 to £324 million by 2007.

12.29 Bowling centres now tend to be part of major leisure developments that include multiplex cinemas, restaurants and nightclubs offering a choice of leisure and entertainment activities.

12.30 Tenpin bowling centres require large buildings of between 2,300 to 4,200 sq m (25,000 to 45,000 sq ft) and are generally located in towns with a population of over 150,000 people. The study area, even excluding the Bristol zones (11 and 12) has a population of over 360,000 which is sufficient to support a large tenpin bowling facility.

12.31 B&NES has no major tenpin bowling facilities. The nearest facilities are in Bristol (Hollywood Bowl and Megabowl) and in Swindon (Megabowl). Keynsham, Midsomer Norton and Radstock may not have a sufficient catchment population to support such a facility. However, Bath does have a sufficient potential catchment population to support a major ten pin bowling facility and Megabowl has a requirement for a major facility in Bath (source: Focus).

Bingo and Gambling

12.32 Gambling is a substantial part of the leisure industry. The Government's well-advanced Gambling Bill should lead to growth.

12.33 Great Britain had 688 commercial bingo clubs in 2002, approximately one club per 80,000 people. Bingo clubs have about three million active members and generate 89 million admissions per year (source: BISL).

12.34 The bingo market peaked in the mid-1970s, with almost 2,000 clubs nationwide. Since then the sector has struggled to compete with other leisure activities, including the impact of the National Lottery. However, the decline has bottomed out and attendance figures have remained steady since the late 1990s, and revenues and profits have started to increase.

12.35 Mecca and Gala are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have both invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups.

12.36 The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators such as Mecca and Gala require buildings of between 2,000 to 3,000 sq m, capable of seating up to 2,000 people, with a catchment population of 50,000 to 70,000 people within freestanding towns.

12.37 There is currently only one commercial bingo club in B&NES, i.e. Gala Bingo at Saw Close in Bath. The canvas of operators and Focus did not identify further demand for additional facilities either in Bath or elsewhere in B&NES.

12.38 There were 123 casinos in permitted areas in the Great Britain in 2002, only one per 450,000 people, including several casinos in Bristol. Deregulation of permitted areas, lifting of advertising restrictions and immediate membership is expected to lead to significant growth in the sector. The B&NES population could be sufficient to support a casino.

Nightclubs

12.39 The value of the nightclub market (permanent venue offering dancing in return for an admission fee) declined from £2.16 billion in 1998 to £1.77 billion in 2002 (source: Mintel - Nightclubs). There are approximately 1,750 nightclubs in the UK, approximately one per 30,000 people.

12.40 The sector has faced increasing competition from late night pubs and bars with no admission fees. The BISL envisages a continued period of rationalisation and price competition. However, the forecast trend of significant growth in the 18-24 year old age group is expected to provide a growing market. Bath's large student population should generate demand for nightclub facilities.

12.41 Large nightclubs (capacity up to 2,000 people) are generally located in large towns with a population of over 100,000 people. Bath has a selection of nightclubs including Babylon, Saville's, T's Club, Blue Rooms, Cadillacs and The Fez Club. There is also Moonjuice in Midsomer Norton. This existing provision may limit the potential for major new nightclubs in B&NES but smaller facilities may be viable.

Bars and Restaurants

12.42 Residents in the study area spend on average nearly £900 per annum eating and drinking away from the home in 2002 (source: Experian). Between 1998 and 2002 the eating out market grew by 22%. Pub and restaurant meals account for over 41% of the eating out market.

12.43 Food and drink establishments (Class A3) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks. Within town centres, the demand for A3 uses has increased including a significant expansion in the number of coffees shops, such as Starbucks, Costa Coffee and Coffee Republic. Themed bar operators and pub restaurants have grown significantly over the last ten years, such as JD Wetherspoons. These outlets generally require a minimum 50,000 population and are usually located on main streets or secondary positions close to prime retail, commercial and other leisure users. Bath city centre offers potential for these types of uses. Operators usually require large premises of 250 - 1,500 sq m, in close proximity to public car parks and good transport links.

12.44 National branded pub/restaurant chains have been investing heavily, and not exclusively in larger centres. Many chains such as All Bar One, JD Wetherspoons and Yates Wine Bars have sought representation in smaller centres close to residential communities.

12.45 Themed restaurants have also expanded rapidly in recent years. These operators have located in out of centre retail/leisure parks as well as good secondary/primary high street locations. Fast food operators such as McDonalds and Burger King have expanded the number of drive through outlets, and town centre outlets. Outlets have been developed within retail/leisure parks or on busy roads. Outlets require sites of approximately 0.2 hectares.

12.46 PPG6 (paragraph 2.12) encourages local authorities to '*promote a diversification of uses in town centres as a whole*'. It goes on to suggest that '*complementary uses, during the day and in the evening, can reinforce each other and can make town centres more attractive to local residents, shoppers and visitors.*'

12.47 PPG6 also emphasises the need to encourage investment in retail, employment, leisure and other key town centre uses and to encourage mixed use development in town centres. It suggests that the diversification of uses may *be 'the best way forward for town centres or areas which are deteriorating*'.

12.48 National information available from Goad Plans indicates that the proportion of non-retail uses within town centres across the country has increased over the last decade as shown in Table 12.3. The proportion of Class A1 retail uses in town centres has decreased between 1991 to 2002, whilst non-retail uses including Class A2, A3 and non-retail (service) A1 uses have all increased.

12.49 As indicated in earlier sections of this report, the proportions of Class A3 uses in Bath City Centre (15.7%), Keynsham (13.5%), Midsomer Norton (14.2%) and Radstock (14.6%) are slightly higher than the national average (12.7%). However, the vacancy rates within the four B&NES town centres are much lower than the national average, which partly explains the higher proportions of Class A3 use. Therefore, these slightly higher than average proportions of Class A3 use do not necessarily imply there are unacceptably high proportions of Class A3 use in the four centres in B&NES.

Table 12.3: Goad Plan Town Centres Use Class Mix

Type of Unit	Proportion of Total Number of Units (%)			
	1991	**1994**	**2000**	**2002**
Class A1 (Retail)	63.7	61.2	59.1	57.4
Class A1 (Services)	6.6	6.9	8.2	9.1
Class A2	8.2	8.5	8.9	8.9
Class A3*	8.6	9.2	11.2	12.7
Miscellaneous	0.8	1.0	1.4	1.5
Vacant & Under Const.	13.1	13.2	11.2	10.5
Total	100.0	100.0	100.0	100.0

Source: Goad Centre Reports *excludes Public houses

12.50 Our canvas of operators suggests there is strong operator demand for Class A3 uses, including pub chains, fast food chains, restaurants and coffee shops in B&NES, particularly in Bath, as shown in Appendix D.

12.51 The growth in Class A3 uses within town centres may continue in the future and will compete for shop premises with other town centre uses. Future town centre development should provide additional space for these uses as well as Class A1 retail. An allowance of 10% to 15% of new floorspace for Class A3 uses may be appropriate, i.e. over and above the high street comparison retail floorspace projections set out in Section 11.0, i.e. about 3,700 to 5,500 sq m gross by 2011, over and above the permitted 2,400 sq m gross of restaurant space within the Southgate Centre redevelopment.

Conclusions on Commercial Leisure Facilities in B&NES

12.52 B&NES has a modest selection of commercial leisure facilities which does not reflect the potential catchment population. Most facilities are small independent establishments.

12.53 The population of B&NES (over 173,000) is in theory capable of supporting many commercial leisure facilities including multiplex cinemas, ten pin bowling, nightclubs, bingo and large private health clubs. Therefore, there is potential consumer demand to provide a range of leisure and entertainment facilities within B&NES, if suitable development opportunities can be found.

13.0 SCOPE FOR ACCOMMODATING GROWTH

Emerging Central Government Policy

13.1 As indicated in Section 2 of this report, the emphasis of emerging government policy within draft PPS6 is for the planning system to have a key role in delivering such sustainable communities. It states that local authorities should plan for the growth of existing centres. There are other Government objectives which need to be taken full account of in this context:

- to enhance consumer choice by making provision for a range of shopping, leisure and local services, which allow genuine choice to meet the needs of the entire community, and particularly socially-excluded groups;
- to support an efficient, competitive and innovative retail and leisure sector, with improving productivity;
- to improve accessibility, ensuring that existing or new development is, or will be, highly accessible and well-served by a choice of means of transport.

13.2 The Government's wider policy aims are to promote social inclusion, ensuring that local communities have access to a range of shopping, leisure and local services, and that gaps in provision in areas with poor access to facilities are remedied. The need to regenerate deprived areas and improve the physical environment is also important, as is the need to promote economic growth.

13.3 Local planning authorities are expected, through their development plans, to implement the Government's aims and objectives by planning positively for the growth of, and development in, existing centres.

13.4 Within this context B&NES needs to assess how to actively plan for growth, as identified in this Study, in a sustainable way that promotes social inclusion and physical regeneration.

Floorspace Projections

13.5 The floorspace projections set out in the previous sections indicate there is significant potential for retail development within B&NES over and above existing commitments. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- outstanding development commitments and proposals in competing centres;
- the re-occupation of vacant retail floorspace;
- the reliability of long term expenditure projections;
- the effect of Internet/home shopping;
- the acceptability of higher than average benchmark trading levels;
- the level of operator demand for floorspace in B&NES, particularly in smaller centres, bearing in mind the proximity of larger centres;
- the likelihood that B&NES's existing market share will change in the future;
- the potential impact new development may have on existing centres.

13.6 The floorspace projections shown in the previous section should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development control decisions. The impact new retail development may have on existing retail facilities will need to be considered very carefully, particularly in Bath where the maximum floorspace projections assume a significant reduction (16% on average for comparison goods facilities) in existing trading levels between 2004 and 2011.

13.7 The implications of major retail development within Bristol should also be monitored and the effects which these proposals may have on the demand for additional retail development in B&NES should be carefully considered.

13.8 The expenditure projections in this study take into account home shopping, because *special forms of trading* have been excluded. The study assumes that special forms of trading will remain constant in proportional terms in the future. However, the growth in Internet shopping may affect this assumption, i.e. home shopping could grow in proportional terms. Internet sales growth could reduce projected levels of surplus expenditure, if it leads to a proportional increase in special forms of trading.

13.9 However, the impact of Internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and Internet services utilise existing stores rather than warehouses, e.g. *Tesco Direct*. Therefore, Internet sales will not always significantly reduce the demand for shop floorspace. In addition, some of the growth in Internet sales may divert trade away from mail order companies rather than retail operators. Overall the impact of home shopping on expenditure projections is uncertain.

13.10 The quantitative and qualitative assessments of the potential capacity for new retail floorspace within the previous sections suggest that there may be significant scope for new retail development within B&NES, particularly within Bath. This section assesses the potential implications of accommodating the floorspace projections.

Accommodating Future Growth

13.11 The existing stock of premises can often have a role to play in accommodating projected growth. It is often assumed that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. The floorspace projections in this study assume that the benchmark turnover of comparison floorspace will increase by 1% per annum in the future.

13.12 Vacant shops could help to accommodate future growth. Existing shop vacancy rates within the four town centres in B&NES are relatively low, less than half the national average in Bath, Keynsham and Midsomer Norton. Even the healthiest shopping centres will have some level of vacant space at any given time and have a continual turnover of occupiers. It is therefore unrealistic and inappropriate to assume that vacant retail floorspace in B&NES can absorb a significant level of future expenditure growth.

Implications of Not Securing New Retail Development

13.13 Existing vacant floorspace in B&NES is insufficient to meet the projected floorspace requirements. If the Council fails to secure additional retail development in the future, one or a combination of the following will occur:

- the proportional level of expenditure leakage from B&NES to other competing towns will increase, resulting in an increase in the number and average length of car borne shopping trips; and/or
- existing retail floorspace within B&NES will continue to trade above average and there may be congestion in some shops/stores during peak periods, which may in turn encourage residents to shop outside B&NES.

13.14 We believe that a combination of the two is likely but that the main outcome is likely to be an increase in expenditure leakage to competing centres due to the major development proposals in Bristol.

13.15 As indicated in Section 10.0, the existing proportional level of comparison expenditure leakage from the study area is relatively high. However there is a net inflow of comparison expenditure into B&NES. The retail capacity assessment assumes that this proportional level of net expenditure inflow will remain largely unchanged in the future. This assumption implies that the impact of developments in competing towns such as Bristol and in Wiltshire will be counter-balanced by new development in B&NES, e.g. the Southgate redevelopment.

13.16 An increase in expenditure leakage could have an impact on the number and average length of car borne shopping trips within the study area and would have an adverse impact in terms of sustainability.

13.17 Government guidance indicates that local authorities should plan for growth, and that the quantitative need for retail development is a key consideration. An increase in expenditure leakage from B&NES could be used by developers/retailers to demonstrate a quantitative need for new retail development in B&NES. If insufficient opportunities to provide additional floorspace within B&NES's town centres are identified, there is likely to be pressure for retail development within out-of-centre locations which would do little to maintain or enhance the vitality and viability of town centres.

13.18 Under these circumstances it would be difficult for the Council to resist out-of-centre retail development on retail policy grounds, i.e. need, impact or the sequential approach, unless suitable and viable opportunities within or at the edge-of-town centres are identified and available. For these reasons, the Council should seek to identify opportunities for retail development within or adjoining B&NES's town centres. A separate review of potential development sites has been undertaken.

13.19 The redevelopment of the Southgate Centre is a priority in the short term. However, the retail projections outlined in Section 10 already take into account the proposed Southgate redevelopment (as currently permitted – a net increase of 15,800 sq m gross).

13.20 The retail floorspace projections in Section 10 indicate that the Southgate Centre is sufficient to absorb existing surplus comparison expenditure at 2004, but is not sufficiently large to also accommodate all projected expenditure growth up to 2007 and 2011. There may yet be potential to provide a larger increase in retail floorspace within this development. If a larger increase in retail floorspace is feasible and acceptable within the Southgate redevelopment, then any additional floorspace would need to be subtracted from the floorspace figures shown in Section 10. However, it is unlikely that a larger scheme will meet a significant proportion of the long term floorspace projections up to 2011 and that other development opportunities will need to be explored.

13.21 In the other smaller towns in B&NES (Keynsham, Midsomer Norton and Radstock), the scale of redevelopment opportunities is likely to be more limited. However, the projected quantitative need for retail floorspace is also more limited within these towns.

13.22 The existing food store commitment in Keynsham i.e. the Charlton Road food store, would if implemented meet the demand for additional convenience sales floorspace within Keynsham. The proposed Tesco store extension in Paulton near Midsomer Norton would, if permitted, meet the need for convenience sales floorspace in the Norton/Radstock area. If these proposals were permitted and implemented there would be no overriding need to allocate further opportunities for food store development in the three towns outside Bath. Any food store proposals that do emerge will need to be considered on their individual merits.

14.0 TOWN CENTRE AND RETAIL POLICY REVIEW

Introduction

14.1 This section reviews emerging town centre and retail policies within B&NES. Emerging policies within the Revised Deposit Local Plan are summarised in Section 2.0.

The Shopping Hierarchy

14.2 Policy S.1 sets out the shopping hierarchy in B&NES. Bath is identified as a 'City Centre' at the top of the hierarchy. Keynsham, Midsomer Norton and Radstock are 'Town Centres'. Moorland Road in Bath is the only designated 'District Centre' in B&NES. All other centres are designated as 'Local Centres' or 'Village Centres'.

14.3 Establishing an appropriate hierarchy of centres is not only important in relation to the application of the sequential approach to site selection for development but is also necessary to establish the future strategy for each centre and determination of the appropriate scale and nature of development that could be permitted in each centre.

14.4 PPG6 provides limited guidance on how the network and role of town centres should be established. The range of uses within a town centre, including retail facilities, will help to determine the role of town centres and the centre's position in the regional hierarchy. Paragraph 2.9 of the PPG indicates that local planning authorities should assess the role of town centres and determine the scope for change, renewal and diversification.

14.5 PPG6 provides limited guidance on how centres should be categorised in determining the hierarchy of centres. Paragraph 1.5 indicates that development plans should indicate a hierarchy of centres from *"city centre, through town centre, district centre to local centres and village centres".* This approach has been adopted within the Council's Deposit Draft Local Plan.

14.6 The glossary of terms in Annex A of PPG6 provides a description of different types of centres and a definition is provided for town, district and local centres. However, the glossary of terms does not provide an adequate definition of the difference between regional, sub-regional and other smaller town centres. It does not deal effectively with the functional hierarchy of centres.

14.7 Draft PPS6 also provides further policy on town centre networks and hierarchies. Planning authorities are expected to consider the pattern of provision of different centres - their network - and the roles, range of facilities and degree of specialisation of those centres, i.e. their positions in the hierarchy of centres. Paragraph 2.7 also states:

> *"At both regional and local levels, planning authorities should plan the distribution of growth, using it to rebalance the network of centres to ensure that it is not overly dominated by the largest centres, that there is more even distribution of facilities, and that people's everyday needs are met at the local level. They should therefore seek to:*
>
> - *avoid over-concentration of growth in the highest level centres;*
> - *use growth to strengthen the lower-tier centres, including those town centres needing regeneration; and*
> - *fill some of the gaps by promoting centres to function at a higher level in the hierarchy."*

14.8 Paragraph 2.8 goes on to indicate:

> *"Networks and hierarchies are dynamic, and will change over time, but any significant change in role and function, upward or downward, should come through the development plan, rather than through individual applications. Changes to the upper levels of the hierarchy should be addressed initially at the regional and sub-regional levels, whilst changes to the role of smaller centres, and the implications of upper level changes, should be brought forward through local plans/local development frameworks. In all cases, consideration should be given to the relevant transport policies and strategies. The broad functions of different-sized centres are outlined in the glossary in Annex A."*

14.9 Draft PPS6 provides more detailed definitions of centres within the shopping hierarchy than does PPG6. The glossary in Annex A sets out a description for city centres, town centres, district centres and local centres. These definitions indicate that city centres will be the highest order of centre identified in strategic guidance and will often be the regional centres that serve a wide catchment. Bath City centre is clearly within this category, along with Bristol City Centre. However, *'Town Centres'* will encompass a range of different size of centres. It may therefore be appropriate to split *'Town Centres'* into two sub-categories in order to reflect the variety of centres, e.g. 'principal centres' and 'other town centres'.

14.10 The assessment of the shopping hierarchy in Section 3.0 indicates that Keynsham, Midsomer Norton and Radstock are rated below other larger town centres within the hierarchy, such as Swindon, Chippenham and Trowbridge.

14.11 Based on the analysis of the hierarchy of centres in the sub-region, the hierarchy of centres could be summarised as follows.

Centre Classification	Definition/Comment
Regional/Sub-Regional Centres	**Large centres with a wide range of activities that serve a regional or sub-regional catchment area. These centres may be large city centres or large town centres. Examples could are likely to include; Bristol, Cheltenham, Bath and Swindon.**
Principal Town Centres	**Large town centres that serve a relatively extensive catchment area, but do not serve a sub-regional area and fall at least partly within the catchment area of larger regional/sub-regional centres. Examples are likely to include Gloucester and possibly Trowbridge and Chippenham.**
Other Town Centres	**Other town centres that serve their immediate urban population and in some cases rural catchment areas. These will usually include market and country towns and some traditional suburban centres. Keynsham, Midsomer Norton, Frome and possibly Radstock (depending on the scope for enhancement).**
District Centres	**As described in Annex A of draft PPS6. The primary role of these centres will be the provision of convenience shopping, services and limited comparison shopping serving a relatively localised catchment area. Moorland Road and, depending on the scope for enhancement, Radstock should fall into this category.**
Local Centres	**As described in Annex A of draft PPS6.**

14.12 Bath is clearly a sub-regional centre at the top of the hierarchy within B&NES. Keynsham and Midsomer Norton are lower order town centres and should be categorised as *'other town centres'* rather than larger *'principal town centres'*. Radstock has been classified as a town centre as it is a focus for public transport and incorporates other community facilities associated with a town centre. However, it is a much smaller centre than either Midsomer Norton and Keynsham and could, based on the existing range and scale of facilities, be categorised as a *'district centre'*, at a lower level in the hierarchy. However, if the Council wishes to enhance Radstock's shopping role, then it should be designated as an *'other town centre'* where expansion will be encouraged. The development of additional retail, leisure and community uses on vacant railway land in Radstock may be necessary in order to lift the centre to true town centre status.

Projected Retail Floorspace Requirements

14.13 Table 1 in the Revised Deposit Local Plan sets out floorspace requirements for B&NES up to 2006. This table should be updated and rolled forward to 2011. Based on the revised projections in this study, we would recommend that the amended figures be set at a range of minimum requirements and maximuim floorspace capacity, although this must be explicitly stated in the Local Plan.

14.14 The amended Table would be as follows:

Type	Minimum Sales Floorspace (Sq. M. Net)* 2004 to 2011	Maximum Sales Floorspace (Sq. M. Net)* 2004 to 2011
Convenience Goods	**4,400**	**4,900**
High Street Comparison	**16,750**	**26,500**
Large Format Comparison	**9,500**	**15,300**

* These floorspace projections are over and above existing commitments

14.15 The local plan should also explain that the impacts of new retail floorspace will need to be considered. It is not necessary to state the minimum floorspace figures within the plan, although sufficient sites should be allocated that will allow for the delivery of these minimum floorspace requirements.

Land Allocations and the Criteria for Meeting Assessing Development Proposals

14.16 The Draft Deposit Local Plan allocates two opportunity sites (Policy S.3) which were expected to meet the need for retail development up to 2006, the Southgate Area in Bath and Charlton Road in Keynsham. The revised projections indicate there is an additional retail floorspace requirement over and above these allocations, which are now considered as commitments and excluded form the above table. The Council should therefore consider the allocation of further sites for retail and commercial leisure development.

14.17 The criteria for assessing retail and leisure development proposals that may emerge within B&NES should be as follows:

- What is the locational area of need and what identified centres could potentially fulfil the identified area of need i.e. Bath, Keynsham, Midsomer Norton or other district and local centres?
- Is a site available in appropriate centres (as listed in Draft Local Plan Policy S1 and defined on the Proposals Map) and will this site meet the identified need?
- If so, is the centre site acceptable in terms of site-specific/land use policy, design and highways?
- Is the likely development of an appropriate scale to meet the identified need without harming the town centre or another centre in the hierarchy?
- If there is no centre site, is an edge-of-town centre site (in Bath, Keynsham or Midsomer Norton) acceptable in terms of (iii) and (iv) available with good links to the town centre and genuinely accessible by a choice of means of transport?
- If there is no site within existing centres, or edge of town centre sites, suitable, available and viable to meet the identified need, is there an out-of-centre site, which meets criteria (iii) and (iv) and is genuinely accessible by means of transport other than the car?

14.18 Having followed these steps, it is necessary to evaluate whether development proposals or proposed allocations in the emerging Local Plan accord with these criteria. If edge-of-centre sites or out-of-centre proposals are the only opportunities to meet identified needs, consideration must be given to the potential impact effects on the vitality and viability of existing centres, as should transport issues including accessibility and the effect on the use of the car.

14.19 Retail proposals outside centres (Policy S.4) will only be acceptable if certain criteria are met, in accordance with the need and impact tests, and the sequential approach in PPG6 – Town Centres and Retail Development (Policy SR.7). In our view the proposed wording of Local Plan Revised Deposit Policies S.1, S.2 and S.4 adequately sets out the retail related issues outlined in the criteria set out above. However, the policies should also refer to other major forms of commercial developments, e.g. leisure.

Diversity of Use within Town Centres

14.20 The need for primary shopping frontages and the extent of these areas in Bath City Centre and the other town centres have been reviewed in relation to Central Government guidance (set out below) and an analysis of existing uses.

14.21 The emerging B&NES Local Plan contains two policies relating to appropriate uses within Bath City Centre and the other town centres (Policies S.5 and S.6). Policy S.5

prevents any further development which would result in the loss of Class A1 shop uses at ground floor level within defined primary shopping frontages in the city and town centres. The main aim of this policy is to safeguard shopping uses and the attractiveness of shopping centres. Outside the defined primary shopping frontages, the Deposit Local Plan indicates that a greater diversity of uses is appropriate and where the introduction of Class A2, A3, D1 and D2 may help to make the centre more attractive. Policy S.6 seeks to restrict additional Class A3 uses within Bath City Centre, where there could be an unacceptable impact on residential amenity or the Conservation Area.

14.22 Presumably the reference to development in Policy S.5 includes changes of use. For clarity, Policy S.5 should refer to *'development or changes of use'*.

14.23 PPG6 (Revised June 1996) provides only limited guidance on either the definition of primary areas and appropriate policy measures to control the loss of retail uses and changes of use to Class A3 or other non-retail uses. A strong emphasis of the guidance within PPG6 is related to the need for diversification in town centres. However, the guidance also suggests that local authorities should *'recognise and support the shopping function of the primary shopping area'*. Clearly a balance between diversification (allowing non-retail uses) and supporting the shopping function (protecting Class A1 uses) needs to be found.

The Need for Diversification and Trends in Town Centres

14.24 The trend over recent years for a greater diversification of uses must be considered briefly in the context of wider trends in the high street. There has been an increased polarisation of national multiple fashion retailers in larger centres, often at the expense of smaller centres, as retailers have rationalised their representation. The demand for retail space from multiple comparison retailers is likely to remain relatively low within smaller centres, i.e. Keynsham, Midsomer Norton and Radstock. Investment from small independent retailers and non-retail uses may be vital if these centres are to maintain their vitality and viability. Therefore, future policies relating to changes of use in smaller centres should balance the need to protect the current predominance of retail uses in important frontages with the need to ensure other new investment is attracted to the shopping centres.

14.25 The effects of diversification may help bring more investment into these smaller centres, particularly where the small town centres are unlikely to have a significant role as a higher order comparison shopping destination. If these national trends persist, the re-orientation of the role of small town centres is likely to continue. Planning policies including those relating to appropriate uses and the protection of shop uses should reflect these changes. Policies should respond to these changes in a way that seeks not only to maintain, but also to enhance the vitality and viability of town centres.

14.26 National information available from Goad Plans indicates that the proportion of non-retail uses (Class A2 and A3) within town centres across the country has increased over the last decade, with the proportion of Class A1 retail uses in town centres decreasing. The average proportion of non-retail (Class A2 and A3 use) in Bath City Centre (21.8%) is similar to the national average (21.6%), implying that the current proportion of non-retail uses within the City Centre is not a major problem, particularly given that the vacancy rate is much lower than the national average. However, the proportion of Class A3 use in Bath City Centre (15.7%) is slightly higher than the national average (12.7%), reflecting tourism/leisure needs but which may be a cause for concern in relation to the impact on residential amenity and the Conservation Area. Policies S.6 and S.7 provide appropriate protection against A3 uses that would cause adverse impact.

14.27 PPG6 states at paragraph 2.21 that some leisure uses may disturb nearby residents. It states before granting planning permission, local planning authorities *should 'ensure that the design of the development and the conditions attached mean that the amenities of nearby residents are fully considered'*. PPG6 goes on to suggest that *'changes of use in town centres can sometimes create new concentrations of single uses such as restaurants, take-away food outlets, where the cumulative effects can cause local problems'*. (paragraph. 2.25) Policy S.6 appears to be consistent with this advice.

14.28 Within the other smaller town centres in B&NES, the proportions of non-retail uses (Class A2 and A3) are much higher than the national average, ranging from 27% in Radstock to about 32% in Keynsham. Therefore, whilst the need to protect retail facilities is more of an issue, one would normally expect lower order town centres to have a lower proportion of retail uses and a higher proportion of non-retail services than the national average.

Controlling Changes of Use

14.29 Government guidance recognises that the local authority's ability to exercise control over precise types of retail and service use will be limited by the provisions of the Use Classes Order. For example, a number of non-retail service uses, such as sandwich bars, dry cleaners, undertakers and hairdressers are Class A1 uses, as are tourist related shops, and the loss of retail shops catering for local residents needs to these uses cannot currently be controlled by planning policy.

14.30 It is recognised that a cumulative increase in non-retail uses can, in some cases, diminish the supply of accommodation available for genuine retail use. If large dead frontages are created, then they can affect vitality and the attractiveness of a centre as a shopping area. Guidance therefore suggests that local authorities may operate policies designed to control non-retail frontages uses within specified areas. However, it is also necessary to consider the needs of the local community, for whom a good selection of non-retail uses can be equally beneficial. Again, future policies must seek to balance these needs.

Definition of Primary Shopping Areas

14.31 Paragraph 6 of Annex B to PPG6 indicates that local planning authorities may distinguish between primary and secondary frontages in town centres and can consider their relative importance to the character of the centre. It also states that:

> *'the definition of primary and secondary areas must be realistic: prevailing commercial rental values can give a good indication of the boundary between primary and secondary areas; the existence of retail uses is not itself a good indicator. While primary frontages may be restricted to a high proportion of retail uses – in particular those uses in Class A1 of the Use Classes Order – there should be scope for more flexibility of use in secondary frontages; in those areas diversification has most to contribute.'*

14.32 The paragraph goes on to state:

> *'Plans should set out clear guidelines to apply in development control decisions. Primary and secondary areas should be differentiated on proposals maps if different policy approaches to each are set out in the plan.'*

14.33 Draft PPS6 also advocates a different policy approach for primary and secondary frontages within town centres. Annex A within Draft PPS6 indicates that primary frontages are *'most likely to include a high proportion of retail use'*. Secondary frontages are expected to provide *'greater opportunities for a diversity of use'*.

14.34 The Deposit Draft Local Plan identifies primary shopping frontages within each of the four town centres.

Conclusions on Central Government Guidance

14.35 Central Government advice suggests that it is appropriate for the Council both to define realistic primary shopping areas and to seek to maintain a high proportion of retail use within the primary areas. There is more limited guidance on the form that these policies should take. However, it is unlikely that *'blanket'* restrictions on further changes of uses from Class A1 to A3 or other non-retail uses will be acceptable within town centres as a whole.

14.36 The guidance suggests that prevailing rental levels may be a good indicator of the boundary between primary and secondary shopping areas. However, the availability of recent rental information may be limited, particularly in the smaller centres in B&NES. Other issues will be relevant, such as the role of specific areas in relation to the overall role of the centre, the supply of premises for retail use and the potential need for diversification to tackle declining areas. The appropriateness of primary and secondary area designations in the four centres will also need to be based on these factors.

14.37 The emergence of a large number of vacant premises within shopping frontages may create circumstances in which the policy on changes of use may need to be relaxed in order to attract investment. However, there are limited concentrations of vacant units in all four towns. Therefore, there is no need to relax shopping policies in order to encourage non-Class A1 to reoccupy vacant units or to regenerate rundown areas.

14.38 Alternatively, an extension of primary shopping frontages to prevent changes of use from Class A1 in a wider area could be contrary to Central Government Policy. More importantly, it could potentially be damaging to the vitality and viability of the smaller centres in particular. Outside the primary shopping frontages, the introduction of this type of restrictive policy would be inappropriate as it could lead to an increase in vacant units in the smaller towns in view of demand for Class A1 retail occupiers being lower within the peripheral parts of these town centres. In addition, there is no evidence that the town centres already have a harmful high level of non-shop uses at present. However, there remains a need to monitor the situation.

Bath City Centre

14.39 The demand for retail uses in Bath City Centre is significant and there is a shortage of available premises for new retailers. The retail floorspace projections within Section 10 of this report indicate there is a need to safeguard existing retail facilities in Bath and other towns in B&NES. However, Local Plan policies will need to balance competing pressures for floorspace within the City Centre and area based policies designed to control the mix of uses appear appropriate.

14.40 The City Shopping Area boundary is shown on the Revised Deposit Local Plan Proposals Map. This boundary is tightly drawn around existing retail/service uses and is broadly consistent with the area covered by the Goad Plan for the centre. Four main commercial areas are excluded from the shopping area, as follows:

- the Kingsmead leisure development on James Street West;
- the east side of Manvers Street;
- the north side of George Street and Roman Road; and
- the Pierrepoint Place/Street area.

14.41 In our view the current shopping area boundary is appropriately drawn within the Deposit Local Plan. These fours areas are predominantly in non-retail uses but nevertheless are important parts of the City Centre, providing services uses and office accommodation.

14.42 Within the City Shopping Area, the majority of retail frontages are designated on the Proposals Map as primary frontages, where retail use will be protected. The restrictions within Policy S.5 therefore apply to most of the designated Shopping Area. The main exceptions are George Street, Walcot Street, Lower Borough Walls, Upper Walls Street (west) and Westgate Buildings (east side). In our view these areas are correctly designated as secondary shopping areas, where opportunities for a greater diversity of use may be appropriate.

14.43 Within the designated primary frontages there is generally a predominance of retail use. The continued application of the restrictions in Policy S.5 will be necessary in order to ensure that existing retail floorspace is not lost, which would increase the need to identify new retail development opportunities to meet existing and future need. The retail projections in Section 10 assume that the current level of retail floorspace in Bath city centre will be maintained, and the floorspace projection are new floorspace requirements over and above existing provision. Given that the need for new retail floorspace will be significant in the future, the continued protection of existing retail floorspace in the Local Plan appears to be necessary.

Keynsham

14.44 The primary shopping frontage within Keynsham is tightly drawn and only includes the middle section of the High Street, between Charlton Road and Bath Hill and Rock Road. Shop units within The Centre have been excluded.

14.45 As indicated in Section 7.0, the proportion of Class A2 and A3 uses in Keynsham (31.7%) is significantly above the national average (21.6%). There are only 70 retail units within the centre (excluding A1 services) as a whole. The retail function should be maintained and enhanced within Keynsham. Therefore, a policy to prevent the loss of A1 uses is appropriate. However, a balance and mix of uses remains important to the vitality and viability of the centre.

14.46 The primary shopping frontages as defined in the Deposit Local Plan include the main concentration of retail uses and the centre's small selection of multiple retailers. The secondary shopping frontages on the periphery of the linear shopping centre provide ample opportunity for new non-retail uses.

Midsomer Norton

14.47 Midsomer Norton is also a linear shopping centre. The primary shopping frontages within Midsomer Norton include the south-west section of the High Street, west of North Way. About one half of the High Street is excluded from the primary retail frontage. Commercial agents have confirmed that Zone A rental levels are highest towards the southern end of the High Street and this area has the main concentration of retail uses. The secondary shopping frontages at the northern half of the High Street provide ample opportunity for new non-retail uses.

14.48 As indicated in Section 8.0, the proportion of Class A2 and A3 uses in Midsomer Norton (31%) is significantly above the national average (21.6%). There are only 60 retail units within the centre (excluding A1 services) as a whole. The retail function should be maintained and enhanced within the centre and a policy to prevent the loss of A1 uses is therefore appropriate.

Radstock

14.49 As indicated earlier, Radstock could be designated as district centre rather than a town centre, based on the limited range and scale of facilities in the centre. However, if the centre is enhanced and improved it may serve a more important role as a small town centre. If the centre is re-designated as a district centre, Policy S.8 will apply. However, if it is designated as a town centre then the Council has correctly defined primary frontages within the centre in accordance with Policy S.5.

14.50 As indicated in Section 9.0, the proportion of Class A2 and A3 uses in Radstock (27%) is above the national average (21.6%). There are only 22 retail units within the centre (excluding A1 services). Regardless of Radstock's status as a district or town centre, the retail function should be maintained and enhanced and a policy to prevent the loss of A1 uses is appropriate (either S.5 or S.8).

14.51 Retail uses and frontages are relatively fragmented within Radstock, which makes the designation of primary and secondary frontages difficult. However, the Radco store is an important retail anchor for the centre as a whole, and should be identified as primary frontage. Fortescue Road and The Street (north side) are the main concentration of other retail uses in the town centre. This area should be designated as primary shopping frontage.

15.0 RECOMMENDATIONS

15.1 This report provides a district-wide needs assessment taking into account the results of a household survey and on-street visitor surveys. It provides a guide to the shopping needs in B&NES in the period from 2004 to 2011. The principal conclusions of the analysis contained within this study are summarised below.

The Strategy for B&NES's Centres

15.2 Bath is clearly a sub-regional centre at the top of the hierarchy within B&NES. Keynsham and Midsomer Norton are lower order town centres and should be categorised as *'other town centres'* rather than larger *'principal town centres'*. Radstock could also be classified as an *'other town centre'*. However, Radstock should only be categorised as an 'other town centre' if the Council wish to enhance Radstock's shopping role through a significant expansion of facilities.

15.3 As the largest centre, Bath should be the main focus for large-scale retail and leisure development where the proposed uses are expected to serve a B&NES-wide catchment area or wider. However, each development proposal must be considered on its individual merits and floorspace maximums should not be strictly applied.

15.4 Larger scale retail and leisure development in Keynsham, Midsomer Norton or Radstock may be appropriate where the development serves the local area or addresses a specific area of deficiency in the town.

15.5 Development within all centres should be appropriate in terms of nature and scale to the role of the centre. Developments which are likely to attract customers from a wider area than the town centre's existing catchment area may be considered to be out-of-scale with the role of the centre and may be better located within or adjacent to larger regional/sub-regional centres. Again, each proposal would need to be considered on its individual merits.

15.6 Bath City Centre should remain the main concentration for comparison retailing, leisure and services in B&NES. There is potential to upgrade and improve the quality of retail provision in Bath in the future.

15.7 Growth in population and expenditure should provide opportunities to improve the range and quality of shopping facilities within B&NES, particularly within Bath. New development could help to attract new operators not currently represented in Bath or could allow existing occupiers to occupy larger/better premises.

15.8 Higher order comparison shopping has generally polarised within larger centres. Therefore, Bristol Broadmead, Bath, Cheltenham and Swindon are likely to remain the main focus for comparison shopping within the sub-region. If these national trends persist, then the reorientation of the role of smaller town centres as primarily convenience and lower order comparison shopping is likely to continue. Bath has the best prospects for attracting new investment and major retail development. It seems unlikely that the smaller towns, based on current trends, can provide a significant future role as higher order comparison shopping destinations.

15.9 Within all four town centres, there are a limited number of large modern units available for new occupiers. Most units are small and unsuitable for national multiples, even though vacancy rates are relatively low. It is unlikely that B&NES can attract a significant number of new multiple retail/leisure operators without major new development.

15.10 Bath City Centre provides a good range and choice of comparison shopping facilities. The city centre benefits from its historic environment and pedestrianised streets. However, the lack of available large modern shop units and the absence of a major department store are clear weaknesses when compared with competing centres and there is a general shortage of available shop units. The planned Southgate Centre redevelopment is expected to provide a range of modern units better suited to new occupiers.

15.11 Keynsham and Midsomer Norton both have a reasonable range and choice of shops and services which meet most of the shopping needs of their immediate catchment population. However, within Keynsham, the outflow of convenience expenditure to Bristol is significant, particularly for bulk food shopping trips. There is potential to improve food store provision in Keynsham, which could help to claw back expenditure leakage from Keynsham's primary catchment area.

15.12 Within Bath City Centre, local plan policies need to protect existing retail floorspace, whilst balancing competing pressures for floorspace. Therefore area based policies designed to control the mix of uses are appropriate. The Local Plan should continue to protect retail use within the primary frontages and provide greater opportunities for a diversity of use in other parts of the city centre.

15.13 Within Keynsham and Midsomer Norton the proportions of Class A2 and A3 uses are relatively high. The retail function of these centres should be maintained and enhanced, in line with Policy S.5. If Radstock is designated as a town centre the Council should define primary frontages within the centre in accordance with Policy S.5. The secondary shopping frontages within Keynsham and Midsomer Norton provide ample opportunity for new non-retail uses. Outside the primary shopping frontages, the Council should continue to encourage a mix of commercial uses, including Class A2, A3 and D1 leisure uses.

Meeting Shopping Needs in B&NES

15.14 In order to meet projected growth in expenditure, there is a need for additional shopping facilities in B&NES.

15.15 Future planning policy and site allocations should seek to identify opportunities to accommodate growth up to 2011.

Convenience Development

15.16 On the basis of the assumption that existing convenience retailers trade at reasonable average turnover levels, the quantitative capacity analysis identifies scope for additional convenience floorspace within B&NES up to 2011.

15.17 The main area of deficiency in qualitative terms for food store development is in Keynsham, which should be the priority for new convenience development for main and bulk food shopping. This qualitative need in Keynsham would be met by the proposed Charlton Road food store commitment. There is also potential for a further large food store in Bath.

15.18 Projections up to 2011 suggest that there could be scope to accommodate food superstore floorspace of up to 4,600 sq m net in B&NES by 2011, over and above existing commitments (the Charlton Road food store in Keynsham and the replacement food store in the Southgate Centre in Bath). This figure excludes comparison sales floorspace within food stores.

15.19 The scope for further convenience goods sales is primarily concentrated within Bath (up to 4,100 sq m net out of 4,900 sq m net). The scope within the three smaller towns is more limited (700 to 800 sq m net in total), following the implementation of existing commitments.

Comparison Development

15.20 Further comparison goods floorspace is needed within B&NES up to 2011, in order to ensure that the level of comparison expenditure leakage does not increase significantly in the future as a result of major development in Bristol and other competing centres. Opportunities to accommodate up to 26,500 sq m net (37,900 sq m gross) of high street comparison retail floorspace, and possibly up to 15,300 sq m net (18,000 sq m gross) of large format comparison store floorspace may be required by 2011, broken down as follows:

Town	High Street Comparison Floorspace Sq M Net (Gross)	
	By 2007	By 2011
Bath	**13,700 (19,500)**	**23,400 (33,400)**
Keynsham	**800 (1,200)**	**1,400 (2,000)**
Midsomer Norton/Radstock	**900 (1,300)**	**1,700 (2,500)**
Total	15,400 (22,000)	26,500 (37,900)
Town	Large Format Stores Comparison Floorspace Sq M Net (Gross)	
	By 2007	By 2011
Bath	**8,200 (9,700)**	**14,000 (16,500)**
Keynsham	**300 (400)**	**600 (700)**
Midsomer Norton/Radstock	**300 (400)**	**700 (800)**
Total	8,800 (10,500)	15,300 (18,000)

15.21 This table takes into account the proposed Southgate redevelopment. Therefore, the projections are over and above new floorspace within current commitments (as permitted). However the floorspace figures also assume that the turnover of existing comparison floorspace in Bath will reduce (by about 20%) to benchmark average levels by 2007.

15.22 Allowing time for sites to be identified, assembled and developed and allowing time for new development to achieve settled trading patterns, it is necessary to plan to meet projected need up to 2011 rather than 2007. Recognising that new floorspace cannot be drip fed to meet growth each year, we believe that opportunities to meet projected growth up to 2011 should be identified over the next few years.

15.23 The floorspace breakdown shown above is based on the current distribution of retail facilities within each town in B&NES. There may be some potential to redistribute growth away from Bath to the smaller towns. Nevertheless, in terms of catchment population, available development sites and the potential demand for space from occupiers, Bath clearly provides the main opportunities to improve further higher order comparison shopping in B&NES. Therefore, the floorspace figures shown above provide a suitable and realistic basis for a development strategy in B&NES.

15.24 The comparison floorspace projections above assume that one half of the growth in expenditure on comparison goods typically sold within retail warehouses, i.e. electrical goods, furniture and/or carpets and DIY goods, will be sold in tradition high street comparison floorspace and the other half will be accommodated in large format stores/retail warehouses. It may well not be possible to accommodate all this form of expenditure growth within existing town centres. However, out-of-centre retail development should only be permitted if there is a clear need for the development and the development cannot be accommodated within or adjacent to an existing centre. The potential to disaggregate a proposed retail development should also be carefully considered in applying the sequential approach and Government clarifications.

15.25 Large format retail warehouse development may be incapable of being accommodated within or at the edge of town centres. This form of development could be located in accessible out-of-centre locations but the impact on existing centres would need to be carefully considered. The benefits of out-of-centre retailing in terms of clawing back expenditure leakage need to be carefully considered against the potential disbenefits of any development's impact on existing centres and on the number and length of car borne shopping trips. Nevertheless, the Council should adopt a sequential approach to site selection for all forms of retail and leisure development, including large format stores.

Criteria for Meeting Assessing Development Proposals

15.26 In our view, the proposed wording of Local Plan Revised Deposit Policies S.1, S.2 and S.4 adequately set out the retail related issues outlined in the criteria set out above. However, the policies should also refer to other major commercial developments e.g. leisure. In addition, Policy S4 should also include a criterion that requires developments outside identified centres to be accessible by means of travel other than the car and that these developments should not have a significant adverse impact on the number and length of car borne shopping trips.

Future Strategy Implementation and Monitoring

15.27 There are a number of broad areas of possible action the Council could pursue in order to maintain and enhance the role of shopping centres within B&NES, as follows:

- application of guidance within PPG6 (and the emerging PPS6), particularly relating to need and the sequential approach in determining out-of-centre retail and other development proposals that generate significant numbers of trips;
- measures to improve accessibility and public transport to the town centres in order to encourage more residents to shop within their nearest centre;
- the implementation of shop frontage policies within the Local Plans to protect retail and other desirable town centre uses;
- the continued implementation of public realm improvements to improve the attractiveness of shopping environments within all centres;
- measures to tackle vacant premises and poor shop frontages in rundown areas that exist within centres;
- the creation and continued support for town centre management activities; and
- measures to bring forward development opportunities.

15.28 The recommendations and projections within this study are expected to assist the Council in preparing the Local Plan over the next few years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail development up to 2011. However, it will be necessary to roll forward these projections. However, at this stage it is unnecessary to prepare longer term projections which would be subject to greater uncertainty.

15.29 The forecasts in this study may need to be amended to reflect emerging changes as and when new information becomes available. Therefore, we recommend that this retail capacity study should be updated in 3-4 years' time and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);

- the impact of potential increases in home and internet shopping;
- existing retail floorspace and average turnover to floorspace densities (floorspace surveys and turnover data from Mintel's Retail Ranking); and
- implemented development within and around the study area, in particular emerging proposals in Bristol.

15.30 These key inputs into the retail capacity assessment can be amended to provide revised capacity projections. We do not envisage that the structure of the capacity assessment set out in this report will need to be amended. It may be necessary to undertake an updated household survey to reflect the implementation of major developments that will significantly altered shopping patterns in B&NES.

Appendix A

Study Area and Existing Retail Facilities

STUDY AREA CATCHMENT ZONES – POST CODE AREAS

Zone	Description	Post Code Areas
1	City of Bath	BA1 1, BA1 2, BA1 3, BA1 4, BA1 5, BA1 6, BA2 1, BA2 2, BA2 3, BA2 4, BA2 5, BA2 6
2	Keynsham/Saltford	BS31 1, BS31 2, BS31 3
3	Norton/Radstock	BA3 2, BA3 3, BS39 7
4	North of Bath (Rural)	BA1 9, BA1 8, BA1 7, SN14 7, SN14 8, SN13 8
5	South of Bath (Rural)	BA2 9, BA2 8, BA2 7, BA3 1
6	Chew Valley	BS39 4, BS39 5, BS39 6, BS40 6, BS40 8
7	Frome and South of Norton/Radstock	BA3 4, BA3 5, BA11 3, BA11 2, BA11 1
8	East of Bath (incl. Bradford)	BA1 8, BA3 6, BA15 1, BA15 2, BA14 9
9	West Wiltshire	BA13 3, BA13 4, BA14 0, BA14 6, BA14 7, BA14 8, SN12 6, SN12 7, SN12 8
10	Chippenham	SN15 1, SN15 2, SN15 3, SN13 0, SN13 9, SN14 0
11	Longwell Green/Willsbridge/Oldland	BS16 9, BS30 5, BS30 6, BS30 7, BS30 8, BS30 9
12	Hengrove and Whitchurch	BS14 0, BS14 9,BS14 8, BS4 5

PLAN 1: The Study Area

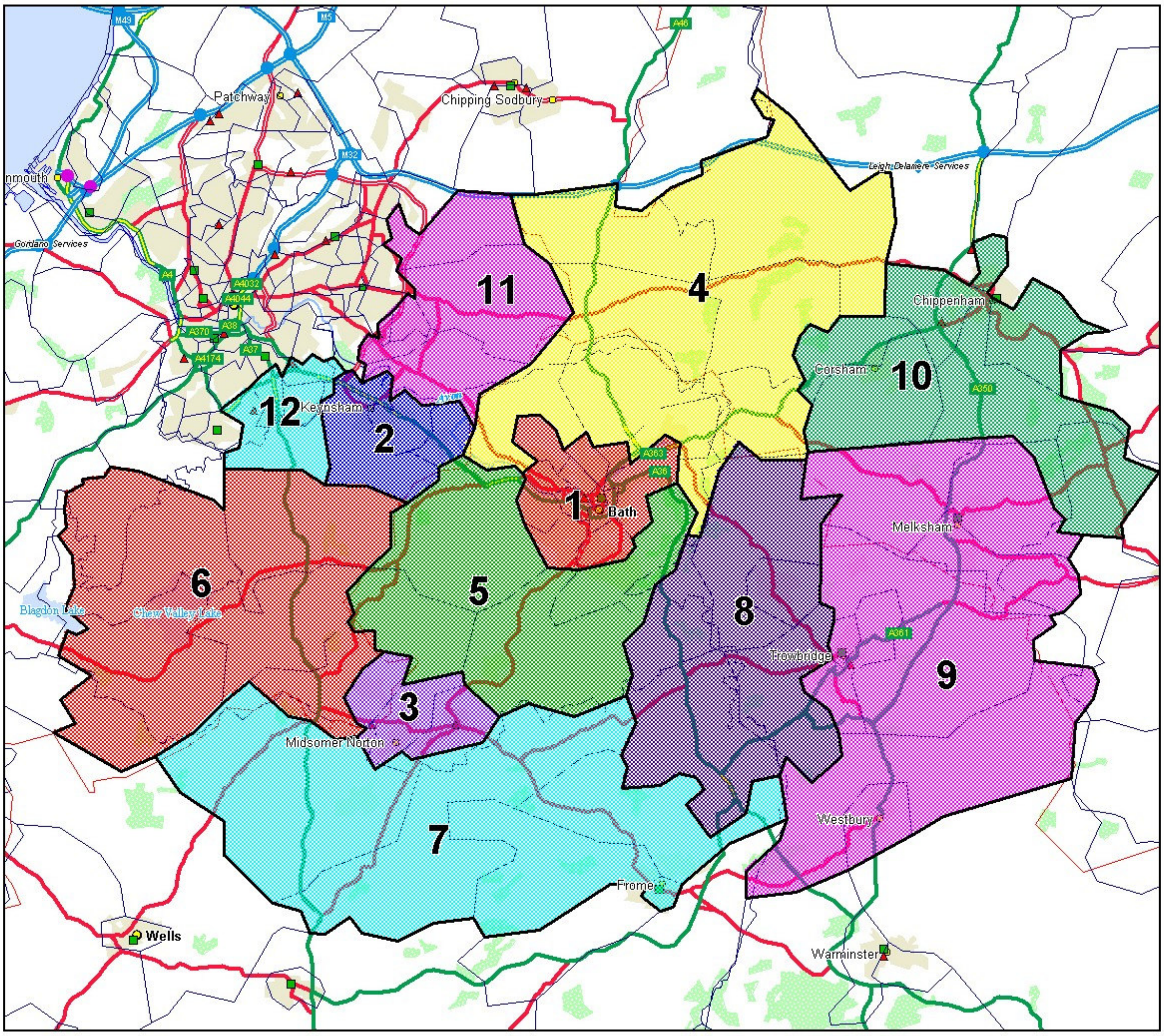


Table 1A - Convenience Goods Retail Floorspace within B&NES

Stores	Net Sales Floorspace Sq M Net	% Floorspace Convenience Sales	Convenience Sales Floorspace Sq M Net	Company Turnover Per Sq M	Benchmark Total £M Turnover
Bath					
Waitrose	1,561	90%	1,405	£10,299	£14.47
Somerfield	860	95%	817	£4,728	£3.86
M&S Food Hall	1,200	100%	1,200	£10,371	£12.45
Iceland	500	95%	475	£4,925	£2.34
Other city centre shops	1,400	100%	1,400	£5,382	£7.53
Sainsbury	3,573	90%	3,216	£10,298	£33.12
Co-op, Oldfield Park	1,509	95%	1,434	£4,484	£6.43
Safeway (Morrisons)	2,137	90%	1,923	£10,563	£20.32
Somerfield, Larkhall	362	95%	344	£4,728	£1.63
Co-op, Stop & Shop	308	95%	293	£4,484	£1.31
Local shops in Bath	6,000	100%	6,000	£4,305	£25.83
	19,410		**18,506**		**£129.28**
Keynsham					
Co-op	2,369	95%	2,251	£6,806	£15.32
Somerfield	522	95%	496	£4,728	£2.34
Iceland	375	95%	356	£4,925	£1.75
Other Keynsham shops	900	100%	900	£4,305	£3.87
	4,166		**4,003**		**£23.29**
Midsomer Norton					
Safeway	1,621	90%	1,459	£8,643	£12.61
Somerfield	521	95%	495	£4,728	£2.34
Lidl	700	95%	665	£3,845	£2.56
Tesco, Paulton	2,438	85%	2,072	£11,468	£23.77
Somerfield, Paulton	343	95%	326	£4,728	£1.54
Other Midsomer shops	600	100%	600	£4,305	£2.58
	6,223		**5,617**		**£45.40**
Radstock					
Radco	3,158	50%	1,579	£6,805	£10.75
Other Radstock Shops	280	100%	280	£4,305	£1.21
	3,438		**1,859**		**£11.95**
B&NES Sub-Total	**33,237**	**90%**	**29,985**	**£7,001**	**£209.91**
	Comparison sales floorspace within food stores Sq M Net				**3,252**

Sources: Institute of Grocery Distribution
NLP street surveys April 2004
Retail Rankings 2003

Table 2A - Food Store Commitments in B&NES

Stores	Net Sales Floorspace Sq M Net	% Floorspace Convenience Sales	Convenience Sales Floorspace Sq M Net	Company Turnover Per Sq M	Benchmark Total £M Turnover
Bath					
Supermarket, Southgate	1,000	95%	950	£10,000	£9.50
Keynsham					
Food Store, Charlton Rd.	2,000	90%	1,800	£10,000	£18.00
Total	**3,000**		**2,750**		**£27.50**
Losses					
Somerfield	860	95%	817	£4,728	£3.86
Total	**2,140**		**1,933**		**£23.64**

Table 3A: Comparison Shops within B&NES

Location	Net Sales Floorspace *	Turnover Per Sq M	Total £M Turnover
B&NES			
Bath City Centre*	49,900	£5,382	£268.56
Bath Local Centres*	20,500	£4,000	£82.00
Homebase, Bath	4,900	£1,581	£7.75
Currys, Bath	1,200	£5,325	£6.39
PC World, Bath	1,200	£8,044	£9.65
Bath Sub-total	**77,700**		**£374.35**
Keynsham*	4,300	£4,000	£17.20
Midsomer Norton*	3,200	£4,000	£12.80
Focus DIY, Paulton	4,200	£1,037	£4.36
Radstock*	2,800	£4,000	£11.20
B&NES Total	**92,200**		**£419.91**

* Net sales floorspace includes comparison goods floorspace within large food stores

Sources: B&NES Floorspace Surveys
NLP street surveys 2004

Table 4A - Major Comparison Shopping Commitments in B&NES

Location	Sq M Net Sales Floorspace	Turnover Per Sq M	Total £M Turnover
Southgate Centre*	15,000	£6,000	£90.00
Food store comparison sales			
- Food store, Keynsham	200	£5,000	£1.00
Total Commitments	**15,200**		**£91.00**

** net increase in comparison sales floorspace*

Sources: B&NES

Appendix B

Convenience Retail Assessment

Table 1B: Study Area Population by Zone

Zone		2001	2004	2007	2011
Zone 1	City of Bath	83,995	86,132	88,230	90,927
Zone 2	Keynsham/Saltford	19,944	20,451	20,950	21,590
Zone 3	Norton/Radstock	24,690	25,318	25,935	26,728
Zone 4	North of Bath Rural	16,133	16,583	17,028	17,607
Zone 5	South of Bath Rural	15,988	16,395	16,794	17,307
Zone 6	Chew Valley	15,622	15,920	16,229	16,670
Zone 7	Frome and south of Norton/Radstock	34,893	35,781	36,652	37,773
Zone 8	East of Bath (incl. Bradford)	75,293	77,882	80,733	81,358
Zone 9	West Wiltshire	23,899	24,753	25,704	25,817
Zone 10	Chippenham	43,293	44,120	44,575	45,006
Zone 11	Longwell Green/Willsbridge/Oldland	37,718	37,735	37,699	37,511
Zone 12	Hengrove and Whitchurch	32,308	32,322	32,292	32,131
Total		**423,776**	**433,392**	**442,821**	**450,425**

Sources: *2001 Census of Population (MapInfo)*
Avon JSPTU
Wiltshire County Council

Table 2B: Convenience Retail Expenditure Per Capita (2002 Prices)

	2002	2002 Excluding SFT	2004	2007	2011
Expenditure Per Capita	£1,420	£1,394	£1,425	£1,472	£1,526

Sources:

Experian local estimates for 2002 convenience goods expenditure per capita

(Excluding special forms of trading - 1.85%)

Experian Business Strategies - recommended forecast growth rates

(1.1% per annum between 2002 to 2007 and 0.9% per annum between 2007 and 2012, and 1% between 2012 to 2016)

Table 3B: Total Available Convenience Goods Expenditure By Zone (£ millions in 2002 Prices)

Expenditure	2004	2007	2011
Zone 1	£122.74	£129.87	£138.75
Zone 2	£29.14	£30.84	£32.95
Zone 3	£36.08	£38.18	£40.79
Zone 4	£23.63	£25.07	£26.87
Zone 5	£23.36	£24.72	£26.41
Zone 6	£22.69	£23.89	£25.44
Zone 7	£50.99	£53.95	£57.64
Zone 8	£110.98	£118.84	£124.15
Zone 9	£35.27	£37.84	£39.40
Zone 10	£62.87	£65.61	£68.68
Zone 11	£53.77	£55.49	£57.24
Zone 12	£46.06	£47.53	£49.03
Study Area Total	**£617.58**	**£651.83**	**£687.35**

Sources: *Table 1B and Table 2B*

Table 4B: Existing Convenience Expenditure Penetration Rates 2004

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow Beyond Study Area
Bath													
Waitrose, City Centre	13%	0%	0%	13%	7%	1%	0%	2%	0%	0%	0%	0%	10%
Sainsbury, Green Park	30%	2%	1%	4%	22%	4%	0%	3%	1%	0%	0%	0%	2%
Safeway, London Road	15%	1%	0%	11%	5%	0%	0%	0%	0%	0%	0%	0%	2%
Other in Bath	29%	1%	0%	25%	16%	1%	0%	2%	0%	1%	1%	1%	5%
Bath Sub-Total	***87%***	***4%***	***1%***	***53%***	***50%***	***6%***	***0%***	***7%***	***1%***	***1%***	***1%***	***1%***	***n/a***
Keynsham	***0%***	***42%***	***0%***	***0%***	***1%***	***1%***	***1%***	***0%***	***0%***	***0%***	***8%***	***1%***	***15%***
Midsomer Norton													
Tesco	1%	1%	50%	0%	21%	20%	6%	0%	0%	0%	0%	0%	5%
Other in Midsomer	0%	0%	33%	0%	4%	11%	2%	0%	0%	0%	0%	0%	5%
Midsomer Norton Sub-Total	***1%***	***1%***	***83%***	***0%***	***25%***	***31%***	***8%***	***0%***	***0%***	***0%***	***0%***	***0%***	***n/a***
Radstock	***0%***	***0%***	***10%***	***1%***	***5%***	***1%***	***4%***	***0%***	***0%***	***0%***	***0%***	***0%***	***5%***
Rest of Study Area													
Western Wiltshire	2%	2%	2%	28%	6%	1%	14%	88%	95%	96%	2%	0%	5%
North Somerset	0%	0%	2%	0%	2%	19%	71%	5%	2%	0%	0%	0%	25%
East Bristol	9%	50%	2%	15%	10%	27%	1%	0%	0%	0%	51%	68%	20%
Rest of Study Area Sub-Total	***11%***	***52%***	***6%***	***43%***	***18%***	***47%***	***86%***	***93%***	***97%***	***96%***	***53%***	***68%***	***n/a***
Outflow from Study Area	***1%***	***1%***	***0%***	***3%***	***1%***	***14%***	***1%***	***0%***	***2%***	***3%***	***38%***	***30%***	***n/a***
Study Area Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	***n/a***

Sources: Research and Marketing Household Survey 2000
NEMS Household Survey 2004
NLP

Table 5B: Available Convenience Goods Expenditure 2004

Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total Turnover £ m
Expenditure 2004 £M	***£122.74***	***£29.14***	***£36.08***	***£23.63***	***£23.36***	***£22.69***	***£50.99***	***£110.98***	***£35.27***	***£62.87***	***£53.77***	***£46.06***	***n/a***	
Bath														
Waitrose, City Centre	£15.96	£0.00	£0.00	£3.07	£1.64	£0.23	£0.00	£2.22	£0.00	£0.00	£0.00	£0.00	£2.57	£25.68
Sainsbury, Green Park	£36.82	£0.58	£0.36	£0.95	£5.14	£0.91	£0.00	£3.33	£0.35	£0.00	£0.00	£0.00	£0.99	£49.43
Safeway, London Road	£18.41	£0.29	£0.00	£2.60	£1.17	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.46	£22.93
Other in Bath	£35.59	£0.29	£0.00	£5.91	£3.74	£0.23	£0.00	£2.22	£0.00	£0.63	£0.54	£0.46	£2.61	£52.22
Bath Sub-Total	***£106.78***	***£1.17***	***£0.36***	***£12.52***	***£11.68***	***£1.36***	***£0.00***	***£7.77***	***£0.35***	***£0.63***	***£0.54***	***£0.46***	***£6.63***	***£150.25***
Keynsham	***£0.00***	***£12.24***	***£0.00***	***£0.00***	***£0.23***	***£0.23***	***£0.51***	***£0.00***	***£0.00***	***£0.00***	***£4.30***	***£0.46***	***£3.17***	***£21.14***
Midsomer Norton														
Tesco, Paulton	£1.23	£0.29	£18.04	£0.00	£4.91	£4.54	£3.06	£0.00	£0.00	£0.00	£0.00	£0.00	£1.69	£33.75
Other in Midsomer	£0.00	£0.00	£11.91	£0.00	£0.93	£2.50	£1.02	£0.00	£0.00	£0.00	£0.00	£0.00	£0.86	£17.22
Midsomer Norton Sub-Total	***£1.23***	***£0.29***	***£29.94***	***£0.00***	***£5.84***	***£7.03***	***£4.08***	***£0.00***	***£0.00***	***£0.00***	***£0.00***	***£0.00***	***£2.55***	***£50.96***
Radstock	***£0.00***	***£0.00***	***£3.61***	***£0.24***	***£1.17***	***£0.23***	***£2.04***	***£0.00***	***£0.00***	***£0.00***	***£0.00***	***£0.00***	***£0.38***	***£7.66***
B&NES Total	**£108.01**	**£13.70**	**£33.91**	**£12.76**	**£18.92**	**£8.85**	**£6.63**	**£7.77**	**£0.35**	**£0.63**	**£4.84**	**£0.92**	**£12.73**	**£230.02**
Rest of Study Area														
Western Wiltshire	£2.45	£0.58	£0.72	£6.62	£1.40	£0.23	£7.14	£97.66	£33.51	£60.36	£1.08	£0.00	£11.14	£222.89
North Somerset	£0.00	£0.00	£0.72	£0.00	£0.47	£4.31	£36.20	£5.55	£0.71	£0.00	£0.00	£0.00	£15.99	£63.94
East Bristol	£11.05	£14.57	£0.72	£3.54	£2.34	£6.13	£0.51	£0.00	£0.00	£0.00	£27.42	£31.32	£24.40	£122.00
Rest of Study Area Sub-Total	**£13.50**	**£15.15**	**£2.16**	**£10.16**	**£4.21**	**£10.66**	**£43.85**	**£103.21**	**£34.21**	**£60.36**	**£28.50**	**£31.32**	**£51.53**	**£408.83**
Outflow	£1.23	£0.29	£0.00	£0.71	£0.23	£3.18	£0.51	£0.00	£0.71	£1.89	£20.43	£13.82	n/a	£42.99
Study Area Total	**£122.74**	**£29.14**	**£36.08**	**£23.63**	**£23.36**	**£22.69**	**£50.99**	**£110.98**	**£35.27**	**£62.87**	**£53.77**	**£46.06**	**£64.26**	**£681.84**

Sources: *Table 3B and Table 4B*

Table 6B: Future Convenience Expenditure Penetration Rates 2007 to 2011

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow Beyond Study Area
Bath	90%	1%	1%	52%	51%	6%	0%	10%	1%	1%	1%	1%	4%
Keynsham	5%	60%	0%	2%	3%	2%	1%	0%	0%	0%	10%	2%	15%
Midsomer Norton/Radstock	0%	0%	93%	0%	30%	32%	12%	0%	0%	0%	0%	0%	5%
B&NES Sub-Total	***95%***	***61%***	***94%***	***54%***	***84%***	***40%***	***13%***	***10%***	***1%***	***1%***	***11%***	***3%***	***n/a***
Rest of Study Area	4%	38%	6%	43%	15%	46%	86%	90%	97%	96%	51%	67%	13%
Outflow from Study Area	***1%***	***1%***	***0%***	***3%***	***1%***	***14%***	***1%***	***0%***	***2%***	***3%***	***38%***	***30%***	***n/a***
Study Area Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	***n/a***

Sources: Research and Marketing Household Survey 2000

NEMS Household Survey 2004

NLP

Table 7B: **Available Convenience Goods Expenditure 2007**

Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total Turnover £ m
Expenditure 2007 £M	***£129.87***	***£30.84***	***£38.18***	***£25.07***	***£24.72***	***£23.89***	***£53.95***	***£118.84***	***£37.84***	***£65.61***	***£55.49***	***£47.53***	***n/a***	
Bath	£116.89	£0.31	£0.38	£13.03	£12.61	£1.43	£0.00	£11.88	£0.38	£0.66	£0.55	£0.48	£6.61	£165.21
Keynsham	£6.49	£18.50	£0.00	£0.50	£0.74	£0.48	£0.54	£0.00	£0.00	£0.00	£5.55	£0.95	£5.96	£39.71
Midsomer Norton/Radstock	£0.00	£0.00	£35.50	£0.00	£7.42	£7.64	£6.47	£0.00	£0.00	£0.00	£0.00	£0.00	£3.00	£60.04
B&NES Sub-Total	**£123.38**	**£18.81**	**£35.89**	**£13.54**	**£20.77**	**£9.56**	**£7.01**	**£11.88**	**£0.38**	**£0.66**	**£6.10**	**£1.43**	**£15.57**	**£264.96**
Rest of Study Area	£5.19	£11.72	£2.29	£10.78	£3.71	£10.99	£46.40	£106.96	£36.70	£62.99	£28.30	£31.85	£53.48	£411.35
Outflow from Study Area	£1.30	£0.31	£0.00	£0.75	£0.25	£3.34	£0.54	£0.00	£0.76	£1.97	£21.09	£14.26	n/a	n/a
Study Area Total	**£129.87**	**£30.84**	**£38.18**	**£25.07**	**£24.72**	**£23.89**	**£53.95**	**£118.84**	**£37.84**	**£65.61**	**£55.49**	**£47.53**	**£69.04**	**£676.31**

Sources: *Table 3B and Table 4B*

Table 8B: **Available Convenience Goods Expenditure 2011**

Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total Turnover £ m
Expenditure 2011 £M	***£138.75***	***£32.95***	***£40.79***	***£26.87***	***£26.41***	***£25.44***	***£57.64***	***£124.15***	***£39.40***	***£68.68***	***£57.24***	***£49.03***	***n/a***	
Bath	£124.88	£0.33	£0.41	£13.97	£13.47	£1.53	£0.00	£12.42	£0.39	£0.69	£0.57	£0.49	£7.05	£176.19
Keynsham	£6.94	£19.77	£0.00	£0.54	£0.79	£0.51	£0.58	£0.00	£0.00	£0.00	£5.72	£0.98	£6.32	£42.15
Midsomer Norton/Radstock	£0.00	£0.00	£37.93	£0.00	£7.92	£8.14	£6.92	£0.00	£0.00	£0.00	£0.00	£0.00	£3.21	£64.12
B&NES Sub-Total	**£131.82**	**£20.10**	**£38.34**	**£14.51**	**£22.18**	**£10.18**	**£7.49**	**£12.42**	**£0.39**	**£0.69**	**£6.30**	**£1.47**	**£16.58**	**£282.46**
Rest of Study Area	£5.55	£12.52	£2.45	£11.55	£3.96	£11.70	£49.57	£111.74	£38.21	£65.93	£29.19	£32.85	£56.07	£431.30
Outflow from Study Area	£1.39	£0.33	£0.00	£0.81	£0.26	£3.56	£0.58	£0.00	£0.79	£2.06	£21.75	£14.71	n/a	n/a
Study Area Total	**£138.75**	**£32.95**	**£40.79**	**£26.87**	**£26.41**	**£25.44**	**£57.64**	**£124.15**	**£39.40**	**£68.68**	**£57.24**	**£49.03**	**£72.65**	**£713.76**

Sources: *Table 3B and Table 4B*

Table 9B: Summary of Convenience Turnover 2004 to 2011 (£Million)

Town	2004	2007	2011
Available Expenditure			
Bath	£150.25	£165.21	£176.19
Keynsham	£21.14	£39.71	£42.15
Midsomer Norton/Radstock	£58.63	£60.04	£64.12
B&NES Total	**£230.02**	**£264.96**	**£282.46**
Benchmark Turnover			
Bath (1)	£129.28	£134.92	£134.92
Keynsham (2)	£23.29	£41.29	£41.29
Midsomer Norton/Radstock	£57.35	£57.35	£57.35
B&NES Total	**£209.92**	**£233.56**	**£233.56**
Surplus Expenditure			
Bath	£20.97	£30.29	£41.27
Keynsham	-£2.15	-£1.58	£0.86
Midsomer Norton/Radstock	£1.28	£2.69	£6.77
B&NES Total	**£20.10**	**£31.40**	**£48.90**

(1) uplift in Southgate Centre food store's benchmark turnover (£5.64 million) added at 2007 and 2011

(2) benchmark turnover of proposed Charlton Road food store (£18 million) added at 2007 and 2011

Sources: Tables 1A, 3A, 5B, 7B & 8B

Appendix C

Comparison Retail Assessment

Table 1C: Comparison Goods Retail Expenditure Per Capita (2002 Prices)

	2002	2002 Excluding SFT	2004	2007	2011
Expenditure Per Capita	£2,371	£2,188	£2,403	£2,766	£3,162

Sources:

Experian local estimates for 2002 comparison goods expenditure per capita
(Excluding special forms of trading - 7.71%)
Experian Business Strategies - recommended forecast growth rates

Table 2C: Total Available Comparison Goods Expenditure (2002 Prices)

Expenditure	2004	2007	2011
Zone 1	£206.98	£244.04	£287.51
Zone 2	£49.14	£57.95	£68.27
Zone 3	£60.84	£71.74	£84.51
Zone 4	£39.85	£47.10	£55.67
Zone 5	£39.40	£46.45	£54.72
Zone 6	£38.26	£44.89	£52.71
Zone 7	£85.98	£101.38	£119.44
Zone 8	£187.15	£223.31	£257.25
Zone 9	£59.48	£71.10	£81.63
Zone 10	£106.02	£123.29	£142.31
Zone 11	£90.68	£104.28	£118.61
Zone 12	£77.67	£89.32	£101.60
Study Area Total	**£1,041.44**	**£1,224.84**	**£1,424.24**

Sources:

Table 1B and Table 1C

Table 3C: **Existing Comparison Expenditure Market Shares and Turnover 2004**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total £M
Expenditure 2004 £M	***£206.98***	***£49.14***	***£60.84***	***£39.85***	***£39.40***	***£38.26***	***£85.98***	***£187.15***	***£59.48***	***£106.02***	***£90.68***	***£77.67***	***n/a***	***£1,041.44***
Market Share														
Bath	69%	22%	41%	53%	66%	24%	32%	27%	17%	19%	13%	4%	25%	**n/a**
Keynsham	0%	25%	0%	0%	1%	4%	0%	0%	0%	0%	3%	2%	10%	**n/a**
Midsomer N/Radstock	1%	0%	30%	0%	4%	3%	1%	1%	0%	0%	0%	0%	10%	**n/a**
B&NES Total	**70%**	**47%**	**71%**	**53%**	**71%**	**31%**	**33%**	**28%**	**17%**	**19%**	**16%**	**6%**	**n/a**	**n/a**
Western Wiltshire	4%	1%	4%	13%	5%	2%	21%	55%	73%	65%	0%	7%	20%	**n/a**
North Somerset	0%	1%	0%	0%	0%	1%	33%	0%	1%	0%	0%	0%	40%	**n/a**
East Bristol	4%	20%	4%	5%	6%	5%	1%	1%	0%	0%	11%	15%	35%	**n/a**
Shops Outside Study Area	22%	31%	21%	29%	18%	61%	12%	16%	9%	16%	73%	72%	n/a	**n/a**
Sub-Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	**n/a**	**n/a**
Turnover £M														
Bath	£142.81	£10.81	£24.94	£21.12	£26.00	£9.18	£27.51	£50.53	£10.11	£20.14	£11.79	£3.11	£119.36	**£477.42**
Keynsham	£0.00	£12.29	£0.00	£0.00	£0.39	£1.53	£0.00	£0.00	£0.00	£0.00	£2.72	£1.55	£2.05	**£20.54**
Midsomer N/Radstock	£2.07	£0.00	£18.25	£0.00	£1.58	£1.15	£0.86	£1.87	£0.00	£0.00	£0.00	£0.00	£2.86	**£28.64**
B&NES Total	**£144.88**	**£23.10**	**£43.20**	**£21.12**	**£27.97**	**£11.86**	**£28.37**	**£52.40**	**£10.11**	**£20.14**	**£14.51**	**£4.66**	**£124.27**	**£526.60**
Western Wiltshire	£8.28	£0.49	£2.43	£5.18	£1.97	£0.77	£18.06	£102.93	£43.42	£68.91	£0.00	£5.44	£64.47	**£322.35**
North Somerset	£0.00	£0.49	£0.00	£0.00	£0.00	£0.38	£28.37	£0.00	£0.59	£0.00	£0.00	£0.00	£19.90	**£49.74**
East Bristol	£8.28	£9.83	£2.43	£1.99	£2.36	£1.91	£0.86	£1.87	£0.00	£0.00	£9.97	£11.65	£27.55	**£78.72**
Expenditure Outflow	£45.53	£15.23	£12.78	£11.56	£7.09	£23.34	£10.32	£29.94	£5.35	£16.96	£66.19	£55.92	n/a	**£300.22**
Total Turnover £M	**£206.98**	**£49.14**	**£60.84**	**£39.85**	**£39.40**	**£38.26**	**£85.98**	**£187.15**	**£59.48**	**£106.02**	**£90.68**	**£77.67**	**n/a**	**£1,277.63**

Sources: Research & Marketing Household Survey 2000
NEMS Household Survey 2004
NLP

Table 4C: **Comparison Expenditure Market Shares and Turnover 2007**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total £M
Expenditure 2007 £M	***£244.04***	***£57.95***	***£71.74***	***£47.10***	***£46.45***	***£44.89***	***£101.38***	***£223.31***	***£71.10***	***£123.29***	***£104.28***	***£89.32***	***n/a***	***£1,224.84***
Market Share														
Bath	80%	25%	43%	55%	70%	24%	33%	27%	15%	17%	8%	2%	23%	**n/a**
Keynsham	0%	25%	0%	0%	1%	4%	0%	0%	0%	0%	2%	2%	10%	**n/a**
Midsomer N/Radstock	1%	0%	30%	0%	4%	3%	1%	1%	0%	0%	0%	0%	10%	**n/a**
B&NES Total	**81%**	**50%**	**73%**	**55%**	**75%**	**31%**	**34%**	**28%**	**15%**	**17%**	**10%**	**4%**	**n/a**	**n/a**
Western Wiltshire	2%	1%	4%	12%	5%	2%	21%	55%	75%	67%	0%	6%	20%	**n/a**
North Somerset	0%	1%	0%	0%	0%	1%	32%	0%	1%	0%	0%	0%	40%	**n/a**
East Bristol	2%	19%	4%	5%	5%	5%	1%	1%	0%	0%	11%	15%	35%	**n/a**
Shops Outside Study Area	15%	29%	19%	28%	15%	61%	12%	16%	9%	16%	79%	75%	n/a	**n/a**
Sub-Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	**n/a**	**n/a**
Turnover £M														
Bath	£195.24	£14.49	£30.85	£25.90	£32.52	£10.77	£33.46	£60.29	£10.66	£20.96	£8.34	£1.79	£133.00	**£578.27**
Keynsham	£0.00	£14.49	£0.00	£0.00	£0.46	£1.80	£0.00	£0.00	£0.00	£0.00	£2.09	£1.79	£2.29	**£22.91**
Midsomer N/Radstock	£2.44	£0.00	£21.52	£0.00	£1.86	£1.35	£1.01	£2.23	£0.00	£0.00	£0.00	£0.00	£3.38	**£33.79**
B&NES Total	**£197.68**	**£28.97**	**£52.37**	**£25.90**	**£34.84**	**£13.92**	**£34.47**	**£62.53**	**£10.66**	**£20.96**	**£10.43**	**£3.57**	**£138.67**	**£634.97**
Western Wiltshire	£4.88	£0.58	£2.87	£5.65	£2.32	£0.90	£21.29	£122.82	£53.32	£82.61	£0.00	£5.36	£75.65	**£378.25**
North Somerset	£0.00	£0.58	£0.00	£0.00	£0.00	£0.45	£32.44	£0.00	£0.71	£0.00	£0.00	£0.00	£22.79	**£56.97**
East Bristol	£4.88	£11.01	£2.87	£2.35	£2.32	£2.24	£1.01	£2.23	£0.00	£0.00	£11.47	£13.40	£28.97	**£82.77**
Expenditure Outflow	£36.61	£16.80	£13.63	£13.19	£6.97	£27.38	£12.17	£35.73	£6.40	£19.73	£82.38	£66.99	n/a	**£337.97**
Total Turnover £M	**£244.04**	**£57.95**	**£71.74**	**£47.10**	**£46.45**	**£44.89**	**£101.38**	**£223.31**	**£71.10**	**£123.29**	**£104.28**	**£89.32**	**n/a**	**£1,490.92**

Sources: Research & Marketing Household Survey 2000
NEMS Household Survey 2004
NLP

Table 5C: **Comparison Expenditure Market Shares and Turnover 2011**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total £M
Expenditure 2011 £M	***£287.51***	***£68.27***	***£84.51***	***£55.67***	***£54.72***	***£52.71***	***£119.44***	***£257.25***	***£81.63***	***£142.31***	***£118.61***	***£101.60***	***n/a***	***£1,424.24***
Market Share														
Bath	80%	25%	43%	55%	70%	24%	33%	27%	15%	17%	8%	2%	23%	**n/a**
Keynsham	0%	25%	0%	0%	1%	4%	0%	0%	0%	0%	2%	2%	10%	**n/a**
Midsomer N/Radstock	1%	0%	30%	0%	4%	3%	1%	1%	0%	0%	0%	0%	10%	**n/a**
B&NES Total	**81%**	**50%**	**73%**	**55%**	**75%**	**31%**	**34%**	**28%**	**15%**	**17%**	**10%**	**4%**	**n/a**	**n/a**
Western Wiltshire	2%	1%	4%	12%	5%	2%	21%	55%	75%	67%	0%	6%	20%	**n/a**
North Somerset	0%	1%	0%	0%	0%	1%	32%	0%	1%	0%	0%	0%	40%	**n/a**
East Bristol	2%	19%	4%	5%	5%	5%	1%	1%	0%	0%	11%	15%	35%	**n/a**
Shops Outside Study Area	15%	29%	19%	28%	15%	61%	12%	16%	9%	16%	79%	75%	n/a	**n/a**
Sub-Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	**n/a**	**n/a**
Turnover £M														
Bath	£230.01	£17.07	£36.34	£30.62	£38.31	£12.65	£39.41	£69.46	£12.25	£24.19	£9.49	£2.03	£155.87	**£677.70**
Keynsham	£0.00	£17.07	£0.00	£0.00	£0.55	£2.11	£0.00	£0.00	£0.00	£0.00	£2.37	£2.03	£2.68	**£26.81**
Midsomer N/Radstock	£2.88	£0.00	£25.35	£0.00	£2.19	£1.58	£1.19	£2.57	£0.00	£0.00	£0.00	£0.00	£3.97	**£39.74**
B&NES Total	**£232.88**	**£34.13**	**£61.70**	**£30.62**	**£41.04**	**£16.34**	**£40.61**	**£72.03**	**£12.25**	**£24.19**	**£11.86**	**£4.06**	**£162.53**	**£744.24**
Western Wiltshire	£5.75	£0.68	£3.38	£6.68	£2.74	£1.05	£25.08	£141.49	£61.23	£95.35	£0.00	£6.10	£87.38	**£436.91**
North Somerset	£0.00	£0.68	£0.00	£0.00	£0.00	£0.53	£38.22	£0.00	£0.82	£0.00	£0.00	£0.00	£26.83	**£67.08**
East Bristol	£5.75	£12.97	£3.38	£2.78	£2.74	£2.64	£1.19	£2.57	£0.00	£0.00	£13.05	£15.24	£33.55	**£95.86**
Expenditure Outflow	£43.13	£19.80	£16.06	£15.59	£8.21	£32.15	£14.33	£41.16	£7.35	£22.77	£93.70	£76.20	n/a	**£390.44**
Total Turnover £M	**£287.51**	**£68.27**	**£84.51**	**£55.67**	**£54.72**	**£52.71**	**£119.44**	**£257.25**	**£81.63**	**£142.31**	**£118.61**	**£101.60**	**n/a**	**£1,734.53**

Sources: Research & Marketing Household Survey 2000
NEMS Household Survey 2004
NLP

Table 6C: Summary of Comparison Turnover 2004 to 2011

Town	2004	2007	2011
Available Expenditure			
Bath	£477.42	£578.27	£677.70
Keynsham	£20.54	£22.91	£26.81
Midsomer Norton/Radstock	£28.64	£33.79	£39.74
B&NES Total	**£526.60**	**£634.97**	**£744.24**
***Benchmark Turnover** (1)*			
Bath (2)	£374.35	£475.69	£495.01
Keynsham (3)	£17.20	£18.72	£19.48
Midsomer Norton/Radstock	£28.36	£29.22	£30.41
B&NES Total	**£419.91**	**£523.63**	**£544.90**
Surplus Expenditure			
Bath	£103.07	£102.57	£182.69
Keynsham	£3.34	£4.19	£7.33
Midsomer Norton/Radstock	£0.28	£4.57	£9.33
B&NES Total	**£106.69**	**£111.33**	**£199.35**

(1) benchmark turnover of existing floorspace assumed to grow at 1% per annum from 2004

(2) comparison turnover of Southgate Centre redevelopment (£90 million) added at 2007

(3) comparison turnover of Charlton Road food store proposed in Keynsham (£1 million) added at 2007

Sources: *Tables 2A and 3C to 5C*

Appendix D

Retail Operators' Requirements

OPERATOR REQUIREMENTS SURVEY

BATH

Company Name	Floorspace Requirement Sq Ft	Location
Aldi	**12,500**	**City Centre/Out of Centre**
B&Q	**65,000**	**Out of Centre**
Bakersfield Entertainment/Mood	**10,000 - 15,000**	**City Centre**
Bathstore.com	**3,000 - 4,000**	**Out of Centre**
Book sale	**1,600 – 2,500**	**City Centre**
Bookworld/Bargain Books	**1,500 – 2,500**	**City Centre**
Brantano	**5,000**	**Out of Centre**
Burger King	**8,000**	**Out of Centre**
Cafe Nero	**300 – 6,000**	**City Centre/Out of Centre**
Carpetright	**10,000**	**Out of Centre**
Costa Coffee	**800 – 2,500**	**City Centre**
D2 Jeans	**2,000 – 2,500**	**City Centre**
Faith Shoes	**2,000 – 2,500**	**City Centre**
F Hinds	**1,200**	**City Centre**
Farmfoods	**5,000**	**Out of Centre**
Fat Face	**800 – 2,500**	**City Centre**
Gift Company	**1,000**	**City Centre**
Greggs	**850 – 1,000**	**City Centre/Out of Centre**
Halfords	**4,000 – 7,500**	**Out of Centre**
House of Fraser	**150,000**	**City Centre**
Lakeland	**7,000**	**City Centre**
Lidl	**17,500**	**Out of Centre**
McDonalds	**7,500 – 10,000**	**City Centre/Out of Centre**
Molton Brown	**800 – 2,500**	**City Centre**
New Tecno	**10,000**	**Out of Centre**
Outback Ltd	**6,000**	**City Centre/Out of Centre**
Pets at Home	**7,500 – 15,000**	**Out of Centre**
Phones 4 U	**800 – 2,500**	**City Centre**
Pizza Hut	**3,200**	**Out of Centre**
Sharp Bedrooms	**2,000**	**City Centre/Out of Centre**
Staples	**10,000 – 15,000**	**City Centre/Out of Centre**
Starbucks	**1,500**	**City Centre**
Swatch	**200 - 800**	**City Centre**
Tiles R Us	**5,000**	**Out of Centre**
Time Group	**2,500 – 5,000**	**Out of Centre**
Toys R Us	**15,000 – 30,000**	**Out of Centre**
Travel Inn	**40,000**	**Out of Centre**
Waitrose	**27,000 – 60,000**	**City Centre/Out of Centre**
Whitbread Restaurants	**5,000 – 10,000**	**City Centre/Out of Centre**
Wickes	**50,000**	**Out of Centre**
Woolworth	**Not stated**	**City Centre**
Yates	**8,000**	**City Centre**

KEYNSHAM

Company Name	Floorspace Requirement Sq Ft	Location
Aldi	**12,500**	**Town Centre/Out of Centre**
Costa Coffee	**800 – 2,500**	**Town Centre**
Farmfoods	**5,000**	**Town Centre/Out of Centre**
Fat Face	**800 – 2,500**	**Town Centre**
Greggs	**850 – 1,000**	**Out of Centre**
Molton Brown	**800 – 2,500**	**Town Centre**
Lidl	**17,500**	**Out of Centre**
Phones 4 U	**800 – 2,500**	**Town Centre**
Wilkinsons	**8,000 – 20,000**	**Town Centre**
Woolworths	**Not stated**	**Town Centre**

MIDSOMER NORTON

Company Name	Floorspace Requirement Sq Ft	Location
Aldi	**12,500**	**Town Centre/Out of Centre**
Costa Coffee	**800 – 2,500**	**Town Centre**
Farmfoods	**5,000**	**Town Centre/Out of Centre**
Fat Face	**800 – 2,500**	**Town Centre**
Greggs	**850 – 1,000**	**Town Centre/Out of Centre**
Halfords	**4,000 – 7,500**	**Out of Centre**
Lidl	**17,500**	**Town Centre**
Molton Brown	**800 – 2,500**	**Town Centre**
Phones 4 U	**800 – 2,500**	**Town Centre**
Wilkinsons	**8,000 – 20,000**	**Town Centre**
Woolworth	**Not stated**	**Town Centre**

RADSTOCK

Company Name	Floorspace Requirement Sq Ft	Location
Aldi	**12,500**	**Town Centre/Out of Centre**
Costa Coffee	**800 – 2,500**	**Town Centre**
Fat Face	**800 – 2,500**	**Town Centre**
Greggs	**850 – 1,000**	**Town Centre**
Lidl	**17,500**	**Town Centre**
Molton Brown	**800 – 2,500**	**Town Centre**
Phones 4 U	**800 – 2,500**	**Town Centre**
Whitbread Restaurants	**5,000 – 10,000**	**Town Centre/Out of Centre**
Wilkinsons	**8,000 – 20,000**	**Town Centre**

Occupiers Confirming No Requirements in B&NES

Bang & Olufsen	**Early Learning Centre**	**Tucci**
BHS	**QS**	**Oasis**
Jessops	**Barnados**	**Coast**
Coffee Republic	**Glynn Webb**	**SFI**
Budgens	**Speedo Pizza**	**Swinton Group**

Respondents were asked, if they did not have a requirement in B&NES, what are the main reasons that they were **not** looking for premises.

Below is a list of reasons cited:

'Insufficient demand from the surrounding area'	3
'Already adequately represented in area'	7
'Not current target area'	4
No reason given	4

Those respondents who do have a requirement were asked what has prevented them from securing this requirement to date.

Reasons cited include:

'Lack of availability'

Aldi, B&Q, Booksale, Bookworld/Bargain Books, Carpetright, Costa Coffee, F Hinds, Farmfoods, Fat Face, Halfords, Lakeland, Lidl, McDonalds, Molton Brown, Phones 4 U, New Tecno, Outback Ltd, Starbucks, Tiles R Us, Time Group, Waitrose.

'No suitable sites'

Bakersfield Entertainment/Mood, Bathstore.com, Brantano, Burger King, House of Fraser, Pizza Hut, Sharps Bedrooms, Staples, Toys R Us, Wickes, Yates, Pets at Home, Woolworth.

'Restrictive Government Policy (Planning Restrictions)'

Brantano, Costa Coffee, Fat Face, Halfords, Molton Brown, Phones 4 U, Toys R Us, Whitbread Restaurants, Wickes.

'Price/Rental Levels'

Booksale, D2 Jeans, F Hinds, Faith Shoes, Greggs,

'Poor configuration of space'

Gift Company

RETAIL FOCUS – RETAILER REQUIREMENTS (confirmed requirements in bold)

BATH

COMPANY NAME	SECTOR	REQUIREMENT
99P STORES	VARIETY/DISCOUNT STORES	4,000 - 6,000 sq ft
AGE CONCERN CHARITY	CHARITY SHOPS	650 - 900 sq ft
ALDI STORES LTD	**SUPERMARKETS**	
ALLDERS PLC	DEPARTMENT STORES	32,000 - 200,000 sq ft
ALLIED CARPETS GROUP PLC	CARPETS/FLOOR COVERING	8,000 - 10,000 sq ft
AMERICAN GOLF DISCOUNT CENTRE	SPORTS SHOPS	3,000 sq ft
ARGOS LTD	VARIETY/DISCOUNT STORES	10,000 - 16,000 sq ft
ART	PICTURE FRAMING	600 - 1,200 sq ft
ASK CENTRAL PLC	CAFE/RESTAURANT/BAR	3,000 sq ft
B & Q PLC	**DIY/HARDWARE/GRDN CENTRES**	**45,000 sq ft**
BARNARDO'S	CHARITY SHOPS	500 - 1,500 sq ft
BEAVERBROOKS THE JEWELLERS	JEWELLERS/WATCH SELLERS	1,000 - 1,300 sq ft
BEST CELLARS	PUBLIC HOUSES	3,000 sq ft
BLOCKBUSTER ENTERTAINMENT LTD	TV/VIDEO RENTAL	2,000 - 3,500 sq ft
BOARDSPORTS LTD	SPORTS & LEISURE WEAR	1,500 - 2,000 sq ft
BON MARCHE LTD	WOMEN'S WEAR	2,500 - 3,500 sq ft
BRANTANO UK LTD	**SHOE SHOPS**	**5,000 - 7,500 sq ft**
BRAVISSIMO	HOSIERY/LINGERIE	1,200 sq ft
CAFFE NERO GROUP PLC	**CAFE/RESTAURANT/BAR**	**800 - 1,500 sq ft**
CANCER & LEUKAEMIA IN CHILDHOOD TRUST	CHARITY SHOPS	600 sq ft
CARD FACTORY	NEWSAGENT/CARDS/STATIONER	1,000 - 1,400 sq ft
CARD WAREHOUSE LTD	NEWSAGENT/CARDS/STATIONER	1,000 - 2,500 sq ft
CARDFAIR LTD	NEWSAGENT/CARDS/STATIONER	1,000 - 2,500 sq ft
CARPHONE WAREHOUSE GROUP PLC	MOBILE PHONES	1,000 - 5,000 sq ft
COMPUTER SHOP LTD (THE)	COMPUTERS & SOFTWARE	1,300 sq ft
CONTESSA (LADIESWEAR) LTD	WOMEN'S WEAR	700 - 1,000 sq ft
COSTA LTD	**CAFE/RESTAURANT/BAR**	**1,000 - 2,500 sq ft**
COTSWOLD COMPANY (THE)	FURNITURE	4,000 - 7,000 sq ft
COTTON TRADERS (HOLDINGS) LTD	CLOTHING	2,200 sq ft
D2	**MEN'S WEAR WOMEN'S WEAR JEANS SHOPS**	**2,000 - 2,500 sq ft**
DEICHMANN-SHOES UK LTD	SHOE SHOPS	2,500 - 4,000 sq ft
DREAMS PLC	FURNITURE	3,000 - 10,000 sq ft
DTB	NEWSAGENT/CARDS/STATIONER	1,000 - 2,500 sq ft
EDINBURGH WOOLLEN MILL LTD	KNITWEAR	2,000 sq ft

EISENEGGER LTD	MEN'S WEAR/WOMEN'S WEAR CHILDREN'S/SCHOOL WEAR	2,000 sq ft
ELVI	WOMEN'S WEAR	1,500 sq ft
ESPORTA HEALTH & FITNESS CLUBS	LEISURE/SPORTS	30,000 - 100,000 sq ft
ETHEL AUSTIN LTD	CLOTHING	2,500 sq ft
FAITH FOOTWEAR (HOLDINGS) LTD	**SHOE SHOPS**	**1,000 - 1,400 sq ft**
FARMFOODS LTD	**FOOD**	**4,000 - 5,500 sq ft**
FITNESS FIRST PLC	LEISURE/SPORTS	8,000 - 20,000 sq ft
FLIGHT CENTRE (UK) LTD	TRAVEL AGENTS	250 - 1,000 sq ft
FOODNATION	CAFE/RESTAURANT/BAR	800 - 2,500 sq ft
FRANCHETTI BOND LTD	SHOE SHOPS	800 - 1,100 sq ft
FRANKIE & BENNY'S	CAFE/RESTAURANT/BAR	3,500 - 4,400 sq ft
FREE SPIRIT	SPORTS & LEISURE WEAR	2,500 - 5,000 sq ft
GAMES WORKSHOP GROUP PLC	GAMES & TOYS	1,600 - 2,400 sq ft
GREGGS PLC	**BAKERS**	**600 - 1,200 sq ft**
HALFORDS LTD	**MOTOR ACCESSORIES**	**7,000 - 10,000 sq ft**
HARGREAVES (SPORTS) LTD	SPORTS SHOPS	2,000 sq ft
HARRIETS	CAFE/RESTAURANT/BAR CONFECTIONERS/TOBACCONISTS	2,000 - 4,000 sq ft
HAT COMPANY (THE)	CLOTHING	600 - 750 sq ft
HAWKSHEAD LTD	SPORTS & LEISURE WEAR	1,500 - 7,000 sq ft
HENRI LLOYD LTD	MEN'S WEAR	800 - 1,500 sq ft
HOBBYCRAFT SUPERSTORES LTD	HOBBIES/ARTISTS MATERIALS	8,000 - 10,000 sq ft
HOUSE OF FRASER PLC	**DEPARTMENT STORES**	**100,000 - 200,000 sq ft**
HOUSE OF SAND UK LTD	CLOTHING	1,000 - 1,500 sq ft
JADE SHOES LTD	SHOE SHOPS	1,000 - 2,000 sq ft
JD WETHERSPOON PLC	PUBLIC HOUSES	4,000 - 6,000 sq ft
JOHN R FOX JEWELLERS	JEWELLERS/WATCH SELLERS	300 - 600 sq ft
JULIAN GRAVES LTD	HEALTH FOODS	400 - 1,000 sq ft
JUMPER LTD	KNITWEAR	800 - 1,000 sq ft
KEW	CLOTHING	1,000 sq ft
KEW GREEN HOTELS LTD	HOTELS	39,000 - 70,000 sq ft
KFC (GB) LTD	FAST FOOD/TAKEAWAY OUTLETS	1,750 - 5,000 sq ft
KLICK PHOTOPOINT LTD	PHOTO PROCESSING/PRINTING	500 - 800 sq ft
KRISPY KREME DONUTS	FAST FOOD/TAKEAWAY OUTLETS	2,500 - 4,000 sq ft
LA SENZA PLC CLOTHING	HOSIERY/LINGERIE	2,000 sq ft
LAKELAND LTD	**HOUSEHOLD ACCESSORIES**	**4,000 - 6,000 sq ft**
LITTLE LABELS	CHILDREN'S/SCHOOL WEAR	1,000 sq ft

LK BENNETT	SHOE SHOPS	800 - 2,500 sq ft
LOMO	CAFE/RESTAURANT/BAR	2,000 - 4,000 sq ft
LOVE JUICE LTD	CAFE/RESTAURANT/BAR	100 - 200 sq ft
LUNN POLY LTD	TRAVEL AGENTS	1,200 - 1,500 sq ft
MAPLIN ELECTRONICS LTD	ELECTRICAL/DURABLE GOODS	1,800 - 2,500 sq ft
MEGABOWL LTD	LEISURE/SPORTS	25,000 - 32,000 sq ft
MENKIND STORES LTD	GIFT SHOPS/FANCY GOODS	1,000 - 1,800 sq ft
MEXX LTD	MEN'S WEAR	2,500-3,500 sq ft
MFI FURNITURE GROUP PLC	FURNITURE	3,500 - 4,000 sq ft
MILLETS LEISURE LTD	SPORTS & LEISURE WEAR CAMPING EQUIPMENT	1,500 - 2,500 sq ft
MISTER CLEAN CAR WASH CENTRES	VEHICULAR	
MOOD	**CAFE/RESTAURANT/BAR**	**8,000 - 15,000 sq ft**
MOUNTAIN WAREHOUSE LTD	CAMPING EQUIPMENT SPORTS & LEISURE WEAR	1,500 - 2,500 sq ft
MURPHY & NYE SAILWEAR	SPORTS & LEISURE WEAR SPORTS SHOPS	1,400 - 3,200 sq ft
MUSIC ZONE TRADE DIRECT	RECORDS/TAPES/CDS/VIDEOS	1,500 - 3,000 sq ft
NANDO'S CHICKENLAND LTD	CAFE/RESTAURANT/BAR	2,500 - 3,500 sq ft
NEW VIDAL SASSOON	HAIRDRESSERS/BEAUTICIANS	1,000 sq ft
NOA NOA	WOMEN'S WEAR	500 - 2,000 sq ft
O'BRIENS IRISH SANDWICH BARS (UK) LTD	FAST FOOD/TAKEAWAY OUTLETS	200 - 1,400 sq ft
OFFICE HOLDINGS LTD	SHOE SHOPS	1,500 sq ft
OIL & VINEGAR	GIFT SHOPS/FANCY GOODS	800 - 2,000 sq ft
OLIVER BONAS	GIFT SHOPS/FANCY GOODS	500 - 1,250 sq ft
OUTDOORS LTD	CAMPING EQUIPMENT SPORTS & LEISURE WEAR	1,500 - 2,500 sq ft
PERFUME SHOP LTD	PERFUMERY	250 - 600 sq ft
PETS AT HOME LTD	**PET SHOPS**	**4,000 - 10,000 sq ft**
PHASE EIGHT (FASHION & DESIGNS) LTD	WOMEN'S WEAR	700 - 1,500 sq ft
PIER RETAIL GROUP LTD (THE)	HOMEWARE	7,000 sq ft
PIZZAEXPRESS PLC	CAFE/RESTAURANT/BAR	1,500 - 2,000 sq ft
POD	GIFT SHOPS/FANCY GOODS HOUSEHOLD ACCESSORIES	750 - 1,250 sq ft
PRINCIPLES LTD	WOMEN'S WEAR	1,500 - 2,000 sq ft
PROFESSIONAL COOKWARE COMPANY (THE)	HOMEWARE KITCHENS	750 - 1,500 sq ft
QUBE	SHOE SHOPS	1,500 sq ft
QUIKSILVER	SPORTS SHOPS	2,000 - 4,000 sq ft
R & B LEISURE LTD	CAFE/RESTAURANT/BAR	5,000 sq ft
REGENT INNS PLC	PUBLIC HOUSES	6,000 - 16,000 sq ft

REPUBLIC	MEN'S WEAR WOMEN'S WEAR	2,000 - 3,000 sq ft
RICHER SOUNDS PLC	VIDEO/HI-FI/AUDIOVISUAL	500 - 1,500 sq ft
RILEYS AMERICAN POOL & SNOOKER	LEISURE/SPORTS	10,000 - 12,000 sq ft
ROBERT DYAS LTD	IRONMONGERS/HARDWARE	1,200 - 2,000 sq ft
SAKS HAIR (HOLDINGS) LTD	HAIRDRESSERS/BEAUTICIANS	2,000 sq ft
SANTA FE UK LTD	CAFE/RESTAURANT/BAR	3,000 - 6,000 sq ft
SCOPE	CHARITY SHOPS	750 - 5,000 sq ft
SFI GROUP PLC	CAFE/RESTAURANT/BAR PUBLIC HOUSES	3,000 - 9,000 sq ft
SHARPS INDIVIDUAL BEDROOMS LTD	**FURNITURE**	**1,800 - 5,000 sq ft**
SOFA SOFA	FURNITURE	10,000 - 15,000 sq ft
SPORTS WORLD INTERNATIONAL LTD	SPORTS SHOPS	12,000 - 30,000 sq ft
SPUR RETAURANTS LTD	CAFE/RESTAURANT/BAR	1,000 sq ft
STAPLES (UK) LTD	**OFFICE EQUIPMENT/SUPPLIES FURNITURE**	**10,000 - 17,500 sq ft**
STATIONERY BOX HOLDINGS LTD	NEWSAGENT/CARDS/STATIONER	1,500 sq ft
SUPERDRUG STORES PLC	CHEMISTS	1,500 - 6,000 sq ft
TILES R US LTD	**CARPETS/FLOOR COVERING**	**5,000 - 7,500 sq ft**
TIME GROUP LTD	ELECTRICAL/DURABLE GOODS	500 - 1,500 sq ft
TJ HUGHES PLC	DEPARTMENT STORES	30,000 - 150,000 sq ft
TK MAXX	VARIETY/DISCOUNT STORES	12,000 - 50,000 sq ft
T-MOBILE (UK) LTD	MOBILE PHONES	400 - 700 sq ft
TOPPS TILES PLC	BATHROOMS CARPETS/FLOOR COVERING	4,000 - 8,000 sq ft
TOTALLY MOBILE	MOBILE PHONES	1,500 - 2,500 sq ft
TRAVEL INN	**HOTELS**	
TREDS LTD	SHOE SHOPS	750 sq ft
USC GROUP PLC	MEN'S WEAR	6,000 - 12,000 sq ft
VIYELLA HOLDINGS LTD	WOMEN'S WEAR	800 - 1,200 sq ft
WAGAMAMA LTD	CAFE/RESTAURANT/BAR	3,500 - 5,000 sq ft
WALKABOUT INNS	PUBLIC HOUSES	10,000 - 60,000 sq ft
WHISTLES LTD	WOMEN'S WEAR	1,200 - 2,500 sq ft
WHITBREAD GROUP PLC	CAFE/RESTAURANT/BAR HOTELS	
WORKS PUBLISHERS OUTLET (THE)	BOOKSELLERS	1,500 - 2,500 sq ft
ZARA UK LTD	CLOTHING	10,700 - 16,150 sq ft

KEYNSHAM

COMPANY NAME	SECTOR	REQUIREMENT
FARMFOODS LTD	**FOOD**	**4,000 - 5,500 sq ft**
JD WETHERSPOON PLC	PUBLIC HOUSES	4,000 - 6,000 sq ft
JULIAN GRAVES LTD	HEALTH FOODS	400 - 1,000 sq ft
KFC (GB) LTD	FAST FOOD/TAKEAWAY OUTLETS	2,550 - 2,900 sq ft
SPEEDY HIRE (UK) LTD	TOOL HIRE	5,000 sq ft
SUPERDRUG STORES PLC	CHEMISTS	1,500 - 6,000 sq ft

MIDSOMER NORTON

COMPANY NAME	SECTOR	REQUIREMENT
ARGOS LTD	VARIETY/DISCOUNT STORES	10,000 - 16,000 sq ft
FARMFOODS LTD	**FOOD**	**4,000 - 5,500 sq ft**
HALFORDS LTD	**MOTOR ACCESSORIES**	**7,000 - 10,000 sq ft**
JD WETHERSPOON PLC	PUBLIC HOUSES	4,000 - 6,000 sq ft
PEACOCKS STORES LTD	DEPARTMENT STORES	5,000 - 15,000 sq ft
SPECSAVERS OPTICAL SUPERSTORES LTD	OPTICIANS	1,100 - 1,400 sq ft

Appendix E

Multiple Retailer Representation

Clothing and Fashion Multiple Retailers in Bath, Bristol, Cheltenham and Swindon

Operator	Bath City Centre	Bristol Broadmead	Cheltenham	Swindon TC
Accessorize	√	√	√	
Adams	√	√		
Ann Harvey	√	√		
Austin Reed	√		√	
Barretts	√	√	√	√
Bay Trading Co		√	√	
Blacks	√		√	
Bon Marche		√		√
Burton	√	√	√	√
Ciro Citterio	√	√	√	
Claires Accessories	√	√	√	√
Clarks	√√	√	√√	√
Contessa			√	
Country Casuals	√		√	
Damart		√		
Dolcis			√	
Dorothy Perkins	√	√	√	√
Dune	√			
Edinburgh Woollen Mills	√		√	
Envy	√	√		√
Etam	√	√	√	√
Evans	√	√	√	√
Faith		√		
Fat Face	√			
Footlocker		√		
French Connection	√	√	√	
Gap	√	√	√	
Gap Kids	√	√		
H&M		√		√
Hobbs	√		√	
Jaeger	√		√	
Jigsaw	√		√	
JJB Sports	√	√√	√	
Jones	√		√	
Kaliko	√		√	
Karen Millen	√			
Laura Ashley	√	√	√	
Mark One		√		
Miss Selfridges		√		√
Monsoon	√	√	√	
Monsoon Girl		√		
Morgan		√	√	
New Look		√	√	√
Next	√	√	√	√
Oasis	√	√	√	
Peacock’s Stores			√	√
Pilot	√	√		
Poundstretcher		√		
Primark		√		√
Principles			√	
Quiksilver	√			
QS	√		√	√
Racing Green	√			
River Island	√	√	√	√
Russell & Bromley	√		√	
Select	√			
Shoe Zone		√	√	√
Stead and Simpson	√			
Sole Trader	√	√	√	√
Tammy	√	√	√	√

The Officers Club	√	√	√	√
The Suit Company		√		
Tie Rack	√		√	
TK Maxx		√	√	√
Top Shop & Top Man	√	√	√	√
Viyella			√	
Wallis Fashion	√	√	√	
Warehouse	√	√	√	√
Total	**47**	**45**	**45**	**24**

Department and Variety Stores in Bath, Bristol, Cheltenham and Swindon

Operator	**Bath City Centre**	**Bristol Broadmead**	**Cheltenham**	**Swindon TC**
Argos	√	√	√	√
Bhs	√√	√	√	√
Boots	√√	√	√	√
Debenhams		√	√	√
House of Fraser		√		√
Littlewoods		√	√	√
Marks & Spencer	√	√	√	√
WH Smith	√√	√	√	√
Woolworth		√	√	√
Total	**8**	**9**	**8**	**9**

Furniture, Carpets and Textile Multiples in Bath, Bristol, Cheltenham and Swindon

Operator	**Bath City Centre**	**Bristol Broadmead**	**Cheltenham**	**Swindon TC**
Allied Carpets		√		
Bensons Beds		√		
Habitat	√		√	
Knightingales		√		√
MFI		√		
Moben with Dolphin	√		√	√
Rosebys	√	√		
Sharps Bedrooms		√		
Total	**3**	**6**	**2**	**2**

Electrical and Telephone Multiples in Bath, Bristol, Cheltenham and Swindon

Operator	**Bath City Centre**	**Bristol Broadmead**	**Cheltenham**	**Swindon TC**
BT Phones		√		√
BT Cellnet	√	√	√	
Carphone Warehouse	√	√	√	√
Currys	√			
Dixons	√	√	√	√
Nokia		√		
Orange Shop	√	√	√	√
Phones 4 U	√√	√	√	√
Sony Centre			√	
Tandy				
The Link	√	√	√	√
Time Computers		√		
Tiny Computers	√	√	√	√
T – Mobile	√	√√	√	√
V-Shop		√		
Vodaphone	√√	√√√	√	√
Total	**12**	**16**	**10**	**9**

Other Comparison Multiples in Bath, Bristol and Swindon

Operator	Bath City Centre	Bristol Broadmead	Cheltenham	Swindon TC
Allsports	√	√	√	√
Ann Summers				√
Athena		√	√	
Birthdays		√		
Bodycare		√	√	√
Body Shop	√	√	√	√
Clinton Cards	√√	√√√	√√	√
Co-op Travel			√	
County Bookshops	√	√	√	
Crabtree & Evelyn	√			
Disney Stores	√	√	√	√
Dolland & Aichison	√			
Early Learning Centre	√	√	√	√
Electronics Boutique	√	√	√	√
Ernest Jones	√√	√	√	√
F Hinds			√	√
Flight Centre		√		
Gadgetshop.com		√		
Game		√	√	√
Games Station	√	√		
Games Workshop	√		√	√
Going Places	√	√	√√	√
Goldsmiths	√√	√	√	√
H Samuel	√√	√√	√	√
HMV	√	√	√	√
Jessops			√√	√
JD Sports		√	√	√
Klick Photos			√√	
Lunn Poly	√√	√	√	√
Lush	√		√	
Millets	√	√	√	√
Mothercare	√		√	
MVC			√	
Paperchase	√			
Partners			√	√
Past Times	√	√	√	
Sports Soccer	√		√	√
Stationary Box		√		
Superdrug	√√	√	√√	√
Supersnaps	√			√
The Perfume Shop		√	√	
The Works		√	√	√
Thorntons	√√	√√	√	√
Thomas Cook	√	√	√	√
Virgin		√	√	√
Warren James		√		√
Waterstones	√	√	√	√
Wax Lyrical	√	√		
Whittard	√√	√	√	√
Wilkinson		√	√	√
Total	**38**	**38**	**43**	**30**

Appendix H

Major Leisure Provision

TABLE H1: MAJOR LEISURE PARKS/ FACILITIES IN BRISTOL AND SWINDON

Location	Name	Uses
Bristol	**Avonmeads LP**	**Hollywood Bowl, Showcase plus restaurants.**
Bristol	**Hengrove LP**	**Cineworld, Gala Bingo plus bars and restaurants.**
Bristol	**Aspect LP**	**Warner Village, Bowlplex, Fitness First plus bars and restaurants.**
Bristol	**The Venue, Cribbs Causeway**	**Warner Village, Fitness First plus restaurants.**
Swindon	**Shaw Ridge LP**	**UGC, Megabowl plus bars and restaurants**
Swindon	**Greenbridge**	**Cineworld, Cannons Health Club, Gala Bingo plus restaurants**

TABLE H2: CINEMA PROVISION

Location	Name		Number of Screens	Seats
Bath	**Odeon**		**1**	**652**
	Little Theatre		**2**	**266**
	Robins		**3**	**326**
		Total	6	1,244
Bristol				
Bristol	**Arnolfini**		**1**	**176**
Bristol	**Cineworld**		**14**	**2,663**
Bristol	**The Cube**		**1**	**124**
Bristol	**IMAX**		**1**	**250**
Bristol	**Odeon**		**3**	**838**
Bristol	**Orpheus**		**3**	**414**
Bristol	**Showcase**		**14**	**3,408**
Bristol	**Warner Village (The Venue)**		**12**	**2,622**
Bristol	**Warner Village (Aspects LP)**		**10**	**2,178**
Bristol	**Watershed**		**3**	**354**
		Total	62	13,027
Swindon				
	Cineworld		**12**	**2,063**
	UGC		**7**	**1,874**
		Total	19	3,937
Others				
Frome	**Westway**		**1**	**304**
Chippenham	**Astoria**		**2**	**430**
Salisbury	**Odeon**		**5**	**1,055**
Shepton Mallet	**Amusement Centre**		**1**	**270**
Wells	**Film Centre**		**3**	**311**
		Total	12	2,370
TOTAL			99	20,578

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