



# Bristol Business Development Survey Report 2022

Covering the period 1<sup>st</sup> April 2021 – 31<sup>st</sup> March 2022



## Contents

<b>1. Introduction.....</b>	<b>3</b>
<b>2. Methodology .....</b>	<b>3</b>
<b>3. Development activity in 2021/22 .....</b>	<b>5</b>
a) Completed development.....	5
b) Development commitments .....	8
<b>4. Summary of completed development during the plan period .....</b>	<b>13</b>
<b>Appendix 1 – Summary table of 2021/22 completions .....</b>	<b>17</b>
<b>Appendix 2 – Summary table of development commitments .....</b>	<b>19</b>
<b>Appendix 3 – Changes to Use Classes Order .....</b>	<b>21</b>

**Note:** All reasonable efforts have been made to ensure the accuracy of this report and accompanying schedules. The council cannot be held responsible for any errors, omissions or inaccuracies and accepts no liability whatsoever for any loss or damage howsoever arising. It also reserves the right to publish subsequent amendments. Any comments should be sent to: [research.monitoring@bristol.gov.uk](mailto:research.monitoring@bristol.gov.uk).

Cover photo: City centre office development. Centre left: under construction is Assembly Bristol's Building B near Temple Bridge, Temple Quay. It will provide 3,500 m<sup>2</sup> of floorspace when complete. Centre: Assembly Bristol's Building A. Completed during 2021/22 it is let to the BT Group as a regional office hub able to accommodate up to 2,500 employees in 23,000 m<sup>2</sup> of floorspace provided over 13 storeys.

## 1. Introduction

Bristol City Council carries out an annual survey of planning permissions for business development. It monitors the build-out of permissions affecting retail, office, industrial, warehousing, community infrastructure and leisure uses.

This document is the report of the 2022 survey. It covers the period 1 April 2021 – 31 March 2022. Schedules of the sites covered by the survey are published alongside this report.

The survey identifies the amount of commercial floorspace completed and coming forward each year. This evidence informs the development of planning policies and enables the council to monitor progress towards achieving objectives and targets set out in its Local Plan.

The [Bristol Development Monitoring Report](#) published annually reports on progress being made.

## 2. Methodology

The survey monitors planning permissions that propose a gain or loss of at least 500 m<sup>2</sup> of floorspace for one or more of the following land uses<sup>1</sup>:

- Shops (Use Class A1); Financial and professional services (A2); Restaurants and cafes (A3); Drinking establishments (A4); Hot food takeaways (A5)
- Offices (B1a); Research and development (B1b); Light industry (B1c); General industry (B2); Storage and distribution (B8); sui generis industrial uses (e.g. waste management schemes which have industrial and storage / distribution characteristics)
- Hotels (C1); Residential institutions (e.g. elderly persons care homes, hospitals) (C2)
- Non-residential institutions (e.g. schools, health centres) (D1); Assembly and leisure (e.g. gyms, concert halls) (D2); and sui generis uses (i.e. uses 'in a category of their own', e.g. car sales).

### Local Plan monitoring areas

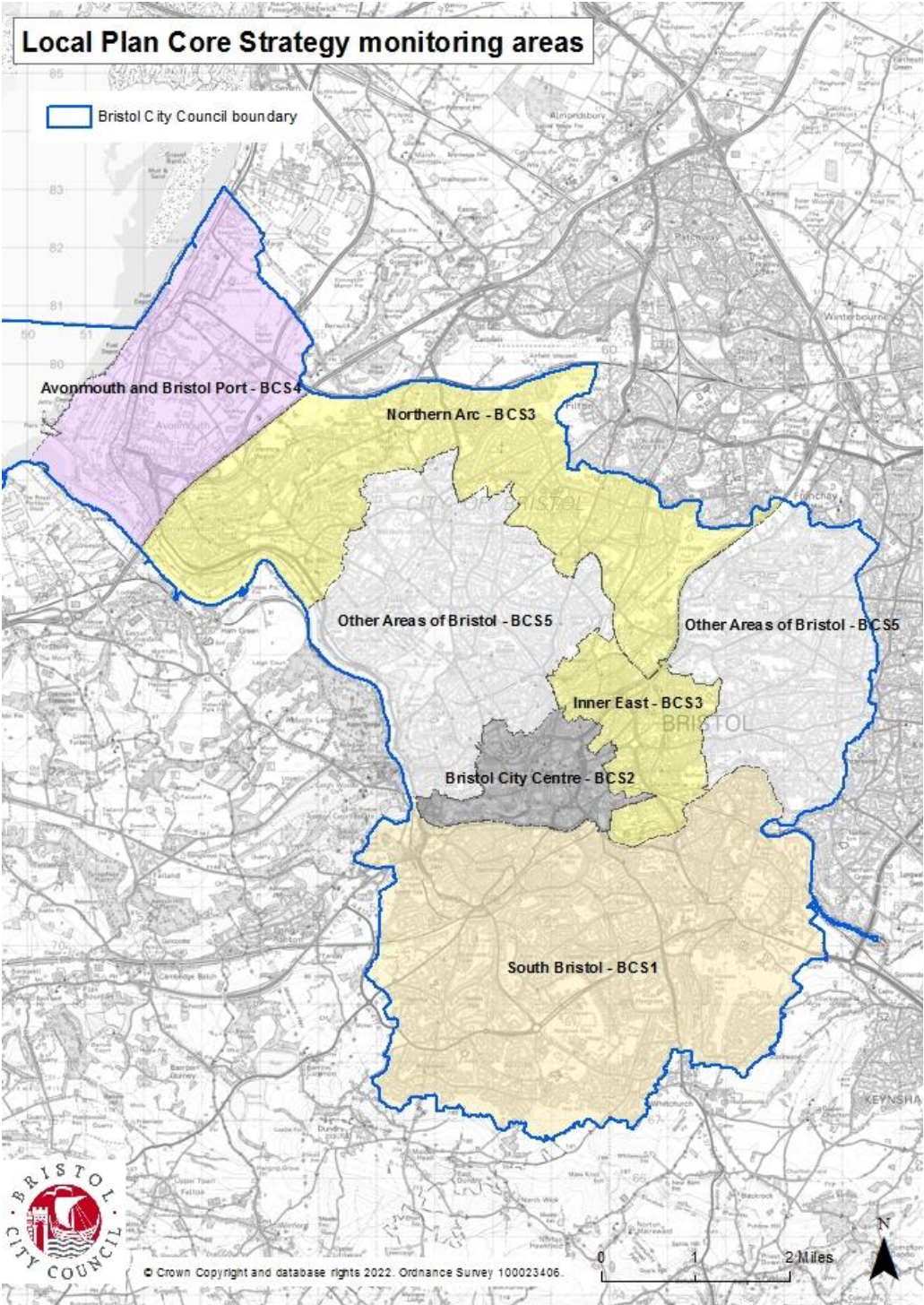
The [Local Plan](#) consists of the Core Strategy; the Site Allocations and Development Management Policies Local Plan; the Central Area Plan; and the West of England Joint Waste Core Strategy. It covers the period 2006/07 – 2025/26.

The Core Strategy is the primary Local Plan document. It sets out the council's planning policies and proposals for meeting the city's strategic development needs relating to housing, employment, retail, transport and community infrastructure. It contains policies and targets relating to particular areas of Bristol illustrated on the map below. Information presented in this report relates to these monitoring areas.

---

<sup>1</sup> As categorised by the Town and Country Planning (Use Classes) Order 1987 and its subsequent amendments up until 31 August 2020. On 1 September 2020 significant changes to the Use Classes Order came into force – see Appendix 3 for a summary. The categories in the pre-1 September 2020 Use Classes Order are used in this report as most of the permissions monitored by the 2022 survey were granted consent prior to the September 2020 changes. To maintain consistency with the survey's approach to land use monitoring in previous years, business development floorspace granted permission after 31 August 2020 has been assigned to the equivalent category of the pre-1 September 2020 Use Classes Order.





### 3. Development activity in 2021/22

#### a) Completed development

The amount of business development floorspace completed in the 2021/22 monitoring period is set out in Table 1.

**Table 1 – completed floorspace 1 April 2021 – 31 March 2022 (m<sup>2</sup>)**

Land Use and Use Class Category		Avonmouth and Bristol Port	Bristol City Centre	Inner East	Northern Arc	Other Areas	South Bristol	Bristol Total
Retail	Gain	0	0	0	388	0	0	388
(e.g. shops, food & drink uses) (A1 - A5)	Loss	0	1,200	715	816	0	970	3,701
	Change	0	-1,200	-715	-428	0	-970	-3,313
Offices (B1a)	Gain	0	25,360	0	439	0	0	25,799
	Loss	0	2,789	0	1,093	0	575	4,457
	Change	0	22,571	0	-654	0	-575	21,342
Industry and warehousing (B1b, B1c, B2, B8, mixed B, sui generis industrial)	Gain	17,275	0	3,090	0	0	588	20,953
	Loss	24,545	690	3,369	3,312	0	10,227	42,143
	Change	-7,270	-690	-279	-3,312	0	-9,639	-21,190
Hotels (C1)	Gain	0	1,650	0	0	0	0	1,650
	Loss	0	0	0	0	0	0	0
	Change	0	1,650	0	0	0	0	1,650
Residential institutions (e.g. hospitals, care homes) (C2)	Gain	0	0	0	4,912	0	0	4,912
	Loss	0	0	0	9,000	1,750	0	10,750
	Change	0	0	0	-4,088	-1,750	0	-5,838
Non-residential institutions (e.g. schools, health centres) (D1)	Gain	0	3,483	0	9,310	0	17,223	30,016
	Loss	0	1,199	0	719	0	10,344	12,262
	Change	0	2,284	0	9,691	0	6,879	18,854
Assembly and leisure (e.g. gyms) (D2)	Gain	0	2,133	1,430	3,403	0	0	6,966
	Loss	0	1,843	759	200	0	0	2,802
	Change	0	290	671	3,203	0	0	4,164
Sui generis (i.e. uses 'in a category of their own', e.g. car sales)	Gain	0	0	0	0	0	0	0
	Loss	0	4,735	0	0	0	1,613	6,348
	Change	0	-4,735	0	0	0	-1,613	-6,348

#### Commentary - key points:

##### Retail

- New retail floorspace gains were limited to a supermarket and café opening in units formerly occupied by Job Centre Plus on Stapleton Road, Easton.
- Losses of retail floorspace included:
  - the demolition of the former Argos store, East Street, Bedminster ahead of a residential-led mixed use scheme
  - units on Millennium Promenade in the Harbourside area of the city centre replaced with a ten-pin bowling and entertainments venue.

## **Offices**

- 2021/22 saw two main city centre completions:
  - Building A of Assembly Bristol, Temple Way, which was pre-let to the BT group as a regional office hub with capacity to accommodate 2,500 employees
  - 15-16 York Street, Brunswick Square, St Paul's, which was converted from a private members social club to form new office workspaces.
- Losses of office floorspace took place mainly in St Paul's through conversions to residential or hotel uses.

## **Industry and warehousing**

- As in previous years most of the new floorspace built was in Avonmouth. The most notable gain was five new units at Access 18, Kings Weston Lane providing 12,445 m<sup>2</sup> of flexible industrial / warehousing floorspace.
- Losses of industrial and warehousing floorspace took place across the city:
  - in Avonmouth this consisted mainly of the demolition of redundant buildings within the Bristol Port estate
  - in the rest of Bristol, most losses were in the 'Bedminster Green' redevelopment area of South Bristol as industrial buildings were demolished to make way for new residential development.

## **Hotels**

- One new city centre hotel scheme was completed: the conversion of former offices at 28 Portland Square, St Paul's to form a 23-bedroom boutique hotel.

## **Residential institutions**

- The most noteworthy completion was the opening of two new operating theatres based in Women and Children's Services at Southmead Hospital.
- 2021/22 also saw the loss of former elderly persons care homes and hospital premises in North Bristol, such as the redundant Monks Park House at Southmead Hospital. The loss of care home accommodation was to make way for new residential development.

## **Non-residential institutions**

- 2021/22 saw the completion of a large number of new educational establishments and community infrastructure facilities:
  - in South Bristol:
    - an Advanced Construction Skills Centre at the City of Bristol College's South Bristol Skills Academy on The Boulevard, Hengrove Park
    - The Park community centre on Daventry Road, Knowle West, which provides classrooms, conference rooms, a dance studio and a gym in two new buildings
    - E-ACT Academy's 3-form entry Primary School with 45-place nursery at Great Hayles Road, Hengrove
    - Merchants' Academy 2-form entry Primary School at Gatehouse Avenue, Withywood
    - a school for children with dyslexia on Four Acres, Withywood.

- in the city centre:
  - the University of Bristol's new Humanities Department teaching hub on Woodland Road, Clifton providing a range of teaching spaces, a 240-person lecture theatre and academic offices
  - Access Creative College's music teaching, production and performance facilities at the former Bierkeller music venue, All Saints' Street.
- in North Bristol:
  - Trinity Academy's 6-form entry Secondary School with sixth form centre at Romney Avenue, Lockleaze.

### ***Assembly and leisure***

- Significant completions in the city centre were:
  - a ten-pin bowling and entertainments venue on Millennium Promenade, Harbourside in units previously used for retail purposes
  - a new arts event space in the former St Michael on the Mount Without church, St Michael's Hill.

## b) Development commitments

The amount of business development floorspace with extant planning approval at the end of 2021/22 which was under construction or not yet started is set out in Table 2.

**Table 2 – Business development floorspace with planning approval at 31 March 2022 (m²)**

Land Use and Use Class Category		Avonmouth and Bristol Port	Bristol City Centre	Inner East	Northern Arc	Other Areas	South Bristol	Bristol Total
Retail	Gain	470	70,505	412	6,450	4,813	14,333	<b>96,983</b>
(e.g. shops, food & drink uses) (A1 - A5)	Loss	471	43,833	0	4,180	1,397	14,633	<b>64,514</b>
	Change	-1	26,672	412	2,270	3,416	-300	<b>32,469</b>
Offices	Gain	0	175,395	1,288	1,000	1,049	10,438	<b>189,170</b>
(B1a)	Loss	0	26,146	511	1,578	4,500	3,540	<b>36,275</b>
	Change	0	149,249	777	-578	-3,451	6,898	<b>152,895</b>
Industry and warehousing	Gain	108,999	1,432	6,614	2,683	2,158	4,318	<b>126,204</b>
(B1b, B1c, B2, B8, mixed B, sui generis industrial)	Loss	33,445	3,236	5,316	54,394	30,099	33,753	<b>160,243</b>
	Change	75,554	-1,804	1,298	-51,711	-27,941	-29,435	<b>-34,039</b>
Hotels	Gain	4,522	55,693	0	0	639	0	<b>60,854</b>
(C1)	Loss	0	0	0	0	735	0	<b>735</b>
	Change	4,522	55,693	0	0	-96	0	<b>60,119</b>
Residential institutions	Gain	0	2,002	0	4,104	965	3,938	<b>11,009</b>
(e.g. hospitals, care homes) (C2)	Loss	0	3,565	0	1,200	3,407	0	<b>8,172</b>
	Change	0	-1,563	0	2,904	-2,442	3,938	<b>2,837</b>
Non-residential institutions (e.g. schools, health centres) (D1)	Gain	200	81,282	0	7,572	310	12,827	<b>102,191</b>
	Loss	0	13,877	880	1,271	0	6,707	<b>22,735</b>
	Change	200	67,405	-880	6,301	310	6,120	<b>79,456</b>
Assembly and leisure	Gain	200	9,876	2,390	72,014	5,444	6,877	<b>96,801</b>
(e.g. gyms) (D2)	Loss	0	0	0	9,777	0	17,906	<b>27,683</b>
	Change	200	9,876	2,390	62,237	5,444	-11,029	<b>69,118</b>
Sui generis	Gain	0	0	0	0	0	2,408	<b>2,408</b>
(i.e. uses 'in a category of their own', e.g. car sales)	Loss	0	4,625	0	0	5,474	956	<b>11,055</b>
	Change	0	-4,625	0	0	-5,474	1,452	<b>-8,647</b>

### Commentary - key points:

#### Retail

##### Under construction

- The conversion of O & M Sheds on Welsh Back in the city centre into a food hall and events venue was the most notable retail floorspace under construction in 2021/22.

##### New permissions

- Two major applications proposing significant new retail floorspace were approved in 2021/22:
  - in South Bristol, 7,450 m² would be provided as part of the redevelopment of Broadwalk Shopping Centre, Knowle, albeit the scheme would lead to the loss of around 11,000 m² of existing floorspace
  - in North Bristol, 6,450 m² was approved as part of proposals for an events arena at the Brabazon hangar on the former Filton Airfield.



- The permission which would lead to the most significant loss of existing floorspace was on Broad Plain in the city centre. 16,000 m<sup>2</sup> of floorspace previously occupied by Gardiner Haskins will be re-purposed for a mixed-use scheme known as Soapworks. This proposes around 1,100 m<sup>2</sup> of new retail floorspace.

#### Commitments – overall picture

- At the end of 2021/22, new retail floorspace with planning permission totalled almost 97,000 m<sup>2</sup>:
  - About 75% or 70,000 m<sup>2</sup> of this is located in the city centre, for example as part of the proposed redevelopment of Callowhill Court, Broadmead (59,100 m<sup>2</sup>) and mixed-use schemes at Wapping Wharf and Dove Lane.
- Around 65,000 m<sup>2</sup> of existing retail floorspace also has permission to be lost, with approximately 70% or 44,000 m<sup>2</sup> in the city centre.
- Overall a net gain of around 32,000 m<sup>2</sup> of new retail floorspace is in the planning pipeline, with almost 27,000 m<sup>2</sup> or 82% in the city centre.

### **Offices**

#### Under construction

- Five major city centre office schemes were under construction in 2021/22, each of which will provide over 10,000 m<sup>2</sup> of new floorspace and around 95,000 m<sup>2</sup> in total:
  - Welcome Building at 4 Glass Wharf, Avon Street (27,191 m<sup>2</sup>); EQ, Temple Street (26,536 m<sup>2</sup>); Halo, Temple Back (15,559 m<sup>2</sup>); Buildings B & C at Assembly Bristol, Temple Way (14,966 m<sup>2</sup>) and The Distillery, Glassfields, Temple Way (11,200 m<sup>2</sup>).

#### New permissions – gains

- During 2021/22 five major city centre office schemes received permission, totalling around 40,000 m<sup>2</sup> of potential new floorspace:
  - Soapworks, Broad Plain (15,467 m<sup>2</sup>), Buildings B & C at Assembly Bristol, Temple Way (14,966 m<sup>2</sup>); Redcliffe Wharf, Redcliffe Way (4,497 m<sup>2</sup>); 1 Friary, Temple Quay (2,941 m<sup>2</sup>) and 100 Victoria Street, Redcliffe (2,768 m<sup>2</sup>).
- Also notable were office permissions in other parts of the city:
  - in South Bristol, 4,664 m<sup>2</sup> was approved as part of a mixed-use scheme at The Boulevard, Hengrove Park
  - as part of the proposal for an events arena at the Brabazon hangar on the former Filton Airfield in North Bristol, 1,000 m<sup>2</sup> of office floorspace was approved.

#### New permissions – losses

- Approvals for existing office buildings to be converted to residential use continued in 2021/22. This was a continuation of a trend which accelerated following the introduction of permitted development rights by the Government in 2013/14. This allowed offices to be converted to flats without the need for a planning application.
- As with 2020/21, the amount of losses approved in 2021/22 (2,497 m<sup>2</sup>) was significantly lower when compared with approvals in the years between 2013/14 and 2019/20.

#### Commitments - overall picture

- At the end of 2021/22, new office floorspace with planning permission totalled almost 190,000 m<sup>2</sup>:

- About 95% or 175,000 m<sup>2</sup> of this is located in the city centre. This includes six schemes which would each provide over 10,000m<sup>2</sup> of new floorspace and 136,000 m<sup>2</sup> in total:
  - Glassfields, Temple Way (36,500 m<sup>2</sup>); Welcome Building at 4 Glass Wharf, Avon Street (27,191 m<sup>2</sup>); EQ, Victoria Street (26,536 m<sup>2</sup>); Halo, Temple Back (15,559 m<sup>2</sup>); Soapworks, Broad Plain (15,467 m<sup>2</sup>); and Buildings B & C at Assembly Bristol, Temple Way (14,966 m<sup>2</sup>)
- Permitted losses of existing office floorspace totalled around 36,000 m<sup>2</sup> at the end of 2021/22.
- Taking losses into account, almost 153,000 m<sup>2</sup> of new office floorspace had approval at the end of 2021/22, 92% of which is located in the city centre.

## ***Industry and warehousing***

### Under construction

- Most noteworthy in 2021/22 was evidence of new units being constructed in areas outside Avonmouth, the city's main location for new industrial and warehousing floorspace in recent years. This included:
  - in the city centre, the University of Bristol's Digital Futures Institute's new research, development and educational facility on Avon Street
  - in South Bristol, 14 new light industrial units at Whitchurch Lane, Hengrove.

### New permissions

- The most significant approval for new industrial and warehousing development was at Access 18, Kings Weston Lane, Avonmouth where outline permission was granted for 72,350 m<sup>2</sup> of mixed floorspace.
- In terms of permissions which would lead to the loss of existing industrial and warehousing floorspace, the most notable was at the Brabazon hangar on the former Filton Airfield. 53,603 m<sup>2</sup> of previous storage and distribution uses would be lost when the building is re-purposed as an events arena.

### Commitments - overall picture

- Permissions for new industrial and warehousing development are characterised by:
  - significant net floorspace gains in Avonmouth, amounting to around 75,000 m<sup>2</sup>;
  - in the rest of the city, larger net floorspace losses in the Northern Arc, Other Areas and South Bristol Core Strategy policy areas, totalling almost 110,000 m<sup>2</sup>.
- Overall, the supply of permitted industrial and warehousing floorspace at the end of 2021/22 shows a potential net loss of around 34,000 m<sup>2</sup>. This is the first time a net pipeline loss has been recorded since monitoring began in 2010/11.

## ***Hotels***

### Under construction

- Two major city centre hotel schemes were under construction in 2021/22:
  - Clayton Hotels, Broad Street (255 bedrooms) and Moxy, Newfoundland Street (214 bedrooms).

### New permissions

- A 125-bed hotel on land to the north of Avonmouth Way, Avonmouth as part of an industrial and warehousing-led mixed-use scheme was the only hotel application approved in 2021/22.

### Commitments - overall picture

- At the end of 2021/22, the amount of new hotel development floorspace with consent was 60,854 m<sup>2</sup>, 92% of which is located in the city centre.

## ***Residential institutions***

### New permissions

- Three hospital-related proposals received permission in 2021/22:
  - at Southmead Hospital, a new building on Kendon Way to accommodate a mix of hospital uses;
  - at the Bristol Royal Infirmary in the city centre, extensions to provide:
    - 18 additional inpatient beds at the Bristol Heart Institute
    - 11 new intensive care beds on the Terrell Street Ward.
- The other notable permission was for an 80-bedroom care home on land formerly occupied by Imperial Tobacco's factory in Hartcliffe, South Bristol.

## ***Non-residential institutions***

### Under construction

- The main educational establishments under construction in 2021/22 were:
  - in South Bristol, Knowle DGE Academy's sixth form centre at Leinster Avenue, Knowle West
  - in the city centre:
    - the British and Irish Modern Music Institute's new campus at Moon Street, Stokes Croft providing multi-use learning and production spaces, a live music venue and two recording studios
    - the University of Bristol's Digital Futures Institute new research, development and educational facility on Avon Street
  - in North Bristol, North Star Academy's school at Hallen Drive, Sea Mills for pupils aged 7-16 with social, emotional and mental health needs.

### New permissions

- Most notable new planning permissions granted in 2021/22 were:
  - in the city centre, the University of Bristol received approval for:
    - the Digital Futures Institute's new research, development and educational facility on Avon Street
    - a new library on The Hawthorns site, Woodland Road, Clifton with capacity for around 2,000 study seats
    - the Bristol Dental School at former offices on Trinity Quay, Avon Street with capacity for approximately 120 dental chairs.

- Also in the city centre, the British and Irish Modern Music Institute received permission for a new campus in former offices at Moon Street, Stokes Croft.
- in North Bristol, a 2,750 m<sup>2</sup> exhibition space was approved as part of the proposals for an events arena at the former Filton Airfield.

#### Commitments – overall picture

- At the end of 2021/22, there was almost 80,000 m<sup>2</sup> of net new non-residential institution floorspace in the planning pipeline. This consisted mainly of:
  - New city centre tertiary / higher education facilities:
    - for the University of Bristol, the Temple Quarter Enterprise Campus (47,823 m<sup>2</sup>); a new Library at Woodland Road (14,320 m<sup>2</sup>); a new Dental School at Trinity Quay, Avon Street (12,660 m<sup>2</sup>); three new lecture theatres at St Michael's Hill (1,638 m<sup>2</sup>); and the Digital Futures Institute's facility on Avon Street (1,350 m<sup>2</sup>)
    - British and Irish Modern Music Institute's new campus at Moon Street, Stokes Croft (3,000 m<sup>2</sup>).
  - New South Bristol secondary and tertiary education facilities:
    - Oasis Community Learning's 6-form entry secondary school at Daventry Road, Knowle West (7,660 m<sup>2</sup>)
    - Knowle DGE Academy's sixth form centre at Leinster Avenue, Knowle West (1,806 m<sup>2</sup>).

### ***Assembly and leisure***

#### New permissions

- The two most significant applications granted permission in 2021/22 were:
  - in North Bristol, an events arena (59,031 m<sup>2</sup>) at the Brabazon hangar on the former Filton Airfield
  - in South Bristol, 2,500 m<sup>2</sup> new floorspace to be provided as part of the redevelopment of Broadwalk Shopping Centre, Knowle, albeit the scheme would lead to the loss of around 4,600 m<sup>2</sup> of existing leisure floorspace.

#### Commitments – overall picture

- At the end of 2021/22, there was almost 70,000 m<sup>2</sup> of net new assembly and leisure floorspace in the planning pipeline. This consisted mainly of the proposal for an events arena at the Brabazon hangar on the former Filton Airfield.

## 4. Summary of completed development during the plan period

The Bristol Local Plan covers the period 2006/07 – 2025/26. This section provides information on the amount of business development completed since 2006/07. It focuses on retail, office and industrial / warehousing floorspace as strategically important economic development uses identified by the Core Strategy.

**Table 3 – completions by Core Strategy monitoring area 2006/07 – 2021/22 (m<sup>2</sup>)**

Land Use and Use Class Category		Avonmouth and Bristol Port	Bristol City Centre	Inner East	Northern Arc	Other Areas	South Bristol	Bristol Total
Retail (A1 - A5)	Gain	1,270	115,810	1,798	11,192	6,820	38,529	<b>175,419</b>
	Loss	2,849	44,958	7,394	3,512	8,813	12,006	<b>79,532</b>
	Change	-1,579	70,852	-5,596	7,680	-1,993	26,523	<b>95,887</b>
Offices (B1a)	Gain	16,297	246,269	3,909	1,729	12,455	33,209	<b>313,868</b>
	Loss	1,145	303,120	7,145	11,025	26,573	64,600	<b>413,608</b>
	Change	15,152	-56,851	-3,236	-9,296	-14,118	-31,391	<b>-99,740</b>
Industry & warehousing (B1b-B8, mixed B, sui generis industrial)	Gain	671,343	1,666	29,823	39,478	14,929	55,564	<b>812,803</b>
	Loss	176,973	131,520	73,821	47,501	49,235	167,260	<b>646,310</b>
	Change	494,370	-129,854	-43,998	-8,023	-34,306	-111,696	<b>166,493</b>

**Table 4 – annual completions 2006/07 – 2021/22: Gross gains (m<sup>2</sup>)**

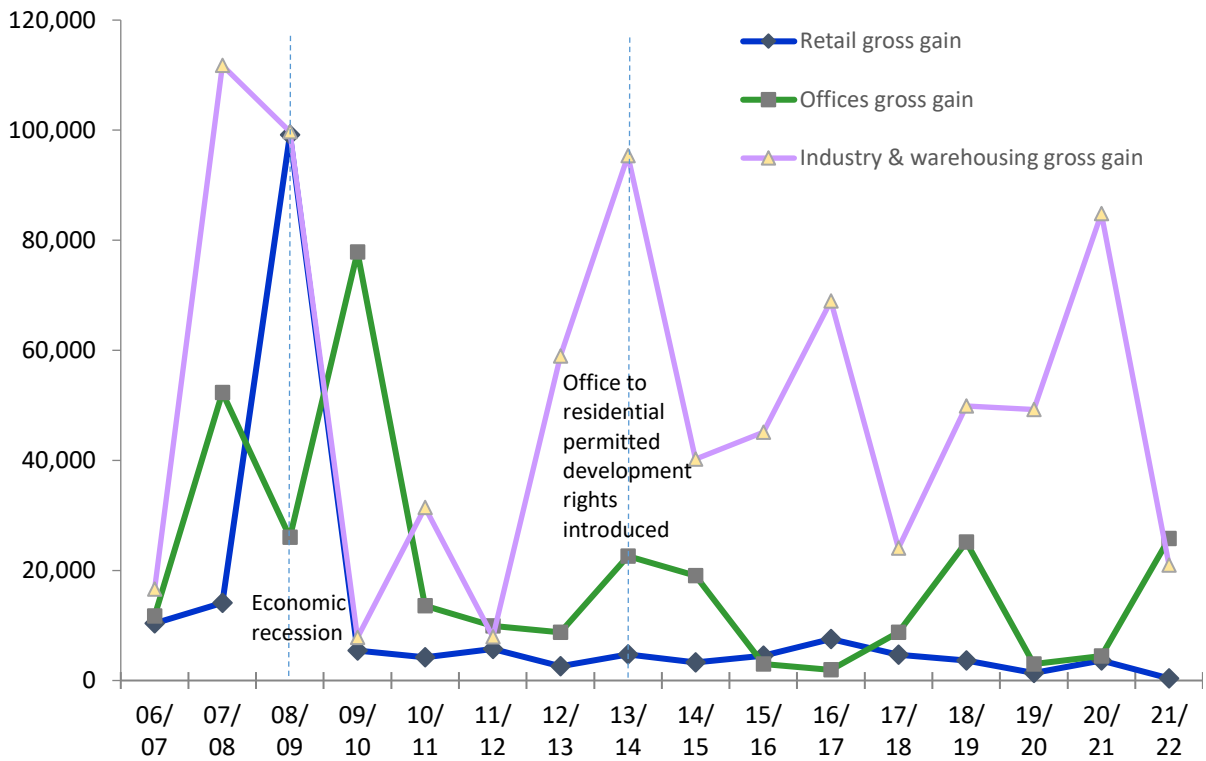
	06/07	07/08	08/09	09/10	10/11	11/12	12/13	13/14	14/15	15/16
Retail	10,390	14,100	99,130	5,437	4,201	5,747	2,615	4,753	3,298	4,533
Offices	11,706	52,315	26,042	77,838	13,610	9,928	8,738	22,573	19,029	3,016
Industry & warehousing	16,635	111,764	99,733	7,798	31,415	7,956	58,978	95,373	40,237	45,095
	16/17	17/18	18/19	19/20	20/21	21/22	Total			
Retail	7,533	4,678	3,641	1,352	3,623	388	<b>175,419</b>			
Offices	1,927	8,726	25,164	3,008	4,449	25,799	<b>313,868</b>			
Industry & warehousing	68,932	24,033	49,853	49,213	84,835	20,953	<b>812,803</b>			

**Table 5 – Annual completions 2006/07 – 2021/22: Net change (gains minus losses) (m<sup>2</sup>)**

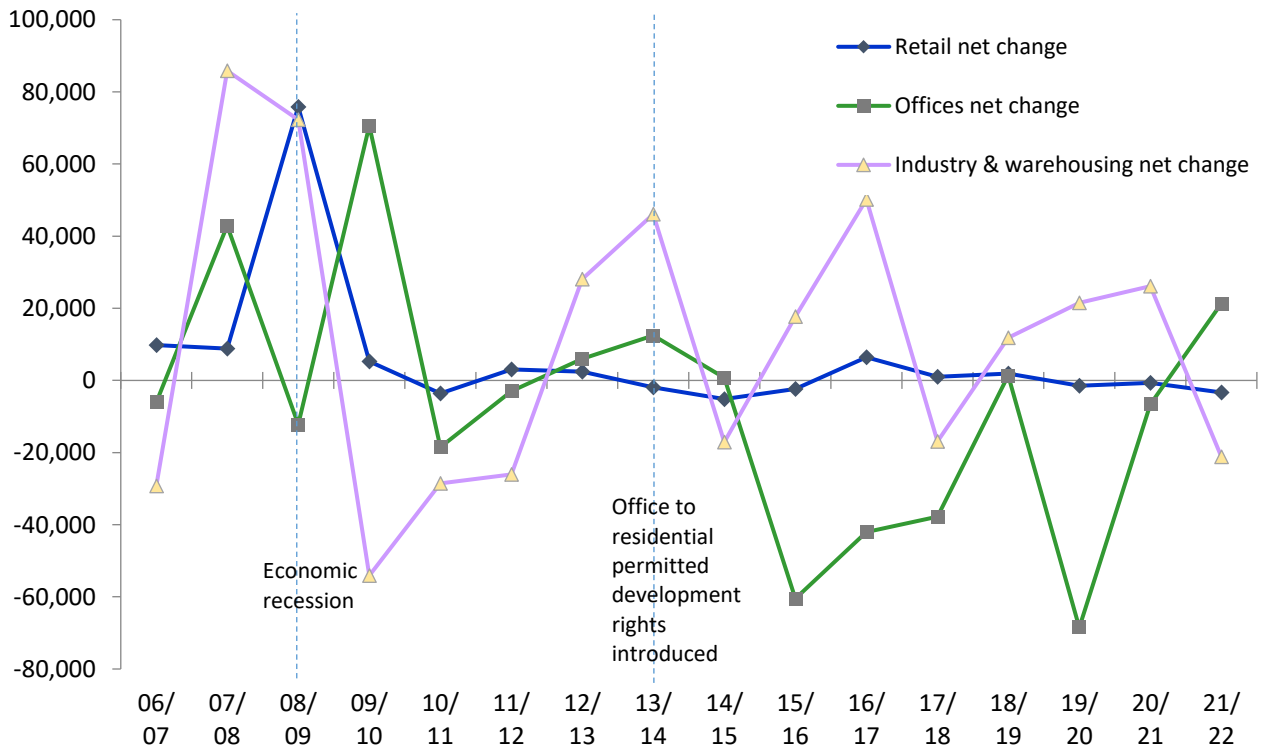
	06/07	07/08	08/09	09/10	10/11	11/12	12/13	13/14	14/15	15/16
Retail	9,759	8,777	75,857	5,237	-3,619	3,020	2,399	-1,878	-5,161	-2,375
Offices	-6,118	42,913	-12,192	70,612	-18,539	-2,994	6,018	12,485	788	-60,454
Industry & warehousing	-29,214	85,846	72,312	-54,100	-28,529	-26,086	28,096	46,071	-17,118	17,684
	16/17	17/18	18/19	19/20	20/21	21/22	Total			
Retail	6,434	971	1,921	-1,457	-685	-3,313	<b>95,887</b>			
Offices	-42,029	-37,810	1,375	-68,505	-6,632	21,342	<b>-99,740</b>			
Industry & warehousing	50,140	-16,881	11,820	21,515	26,127	-21,190	<b>166,493</b>			



**Figure 1 – annual completions 2006/07 – 2021/22: gross gains (m<sup>2</sup>)**



**Figure 2 – annual completions 2006/07 – 2021/22: net change (i.e. gains minus losses) (m<sup>2</sup>)**



## **Commentary - key points:**

### ***Retail***

#### New floorspace

- Completions of new retail floorspace in the first three years of the plan period account for around 70% of the total delivered to date. Some 123,000 m<sup>2</sup> was delivered between 2006/07 and 2008/09 compared with the overall 175,000 m<sup>2</sup> total built since 2006/07.
- Contributing most were three major schemes:
  - Cabot Circus in the city centre (approx. 87,000 m<sup>2</sup>); Imperial Retail Park, Hartcliffe (approx. 10,500 m<sup>2</sup>) and Symes Avenue District Centre (approx. 10,000 m<sup>2</sup>) in South Bristol.
- Since 2009/10 there have been relatively small and stable levels of new retail floorspace built each year. An annual average of approximately 4,000 m<sup>2</sup> has been delivered, with around 51,800 m<sup>2</sup> built in total.
- Of the total 175,000 m<sup>2</sup> built since 2006/07, 66% has been located in the city centre and 22% in South Bristol.

#### Existing floorspace

- Losses of existing retail floorspace have been at generally modest and constant levels over the plan period. An annual average loss of about 5,000 m<sup>2</sup> has taken place, with the total loss around 80,000 m<sup>2</sup>. Approximately 55% of the losses have taken place in the city centre.

Overall, the total amount of new retail floorspace built since 2006/07 is around 95,000 m<sup>2</sup> higher than the amount of existing floorspace lost: 175,000 m<sup>2</sup> gained; 80,000 m<sup>2</sup> lost.

### ***Offices***

#### New floorspace

- Almost 55% of the new office floorspace built since 2006/07 took place in the first four years of the plan period. Around 168,000 m<sup>2</sup> of the 314,000 m<sup>2</sup> total was delivered between 2006/07 – 2009/10, with almost 85% located in the city centre.
- The 2008/09 economic recession led to a significant decline in the demand for new office development compared with the early years of the plan period.
- Nevertheless, since 2010/11 developers have continued to bring forward a steady supply of major new office schemes in Bristol, totalling 145,000 m<sup>2</sup> with an average of around 12,000 m<sup>2</sup> built each year.
- Of the 314,000 m<sup>2</sup> delivered between 2006/07 – 2021/22, 78% was located in the city centre and 11% in South Bristol.

#### Existing floorspace

- Throughout the plan period, existing offices have been converted or demolished to make way for residential, student accommodation and mixed-use redevelopment schemes, as well as replacement, modern office floorspace.
- 414,000 m<sup>2</sup> of floorspace has been lost since 2006/07, of which 73% (303,000 m<sup>2</sup>) has been in the city centre.
- Losses gathered pace after the introduction of permitted development rights in 2013/14 which allowed offices to be converted to housing without the need for a planning application. Almost 70% of the total losses seen during the plan period have taken place since 2014/15, with around 285,000 m<sup>2</sup> lost in that time.

Overall, the plan period so far has seen existing office floorspace losses around 100,000 m<sup>2</sup> higher than the amount of new floorspace built: 314,000 m<sup>2</sup> gained; 414,000 m<sup>2</sup> lost.

### ***Industry and warehousing***

There have been two main trends since 2006/07:

- In Avonmouth, new large-scale storage and distribution schemes, along with modern industrial premises and waste management activities have been developed on former heavy industry sites and greenfield land allocated by the previous Bristol Local Plan adopted in 1997:
  - Of the 813,000 m<sup>2</sup> city-wide total of industrial and warehousing floorspace completions since 2006/07, 83% (671,000 m<sup>2</sup>) have been in Avonmouth
  - 78% of all new floorspace in Avonmouth has been for storage and distribution uses
  - The amount of new floorspace built in Avonmouth since 2006/07 (671,000 m<sup>2</sup>) is almost four times the amount of existing floorspace lost (177,000 m<sup>2</sup>).
- In the rest of Bristol, former industrial and warehousing premises in both city centre and suburban locations have been redeveloped for alternative uses, primarily housing and mixed-use schemes:
  - Of the 469,000 m<sup>2</sup> of non-Avonmouth industrial and warehousing floorspace lost since 2006/07, almost 80% has taken place in South Bristol, the city centre and Inner East
  - The amount of non-Avonmouth industrial and warehousing floorspace losses since 2006/07 (469,000 m<sup>2</sup>) is over three times the amount of new floorspace built (141,500 m<sup>2</sup>).

Overall, since 2006/07 new industrial and warehousing floorspace completions have been around 167,000 m<sup>2</sup> higher than the amount of existing floorspace lost: around 813,000 m<sup>2</sup> gained; 646,000 m<sup>2</sup> lost.

## Appendix 1 – Summary table of 2021/22 completions

**Table 6 – business development floorspace completions in 2021/22 (m²)**

Land Use and Use Class Category		Avonmouth and Bristol Port	Bristol City Centre	Inner East	Northern Arc	Other Areas	South Bristol	Bristol Total
Shops (A1)	Gain	0	0	0	168	0	0	168
	Loss	0	0	715	0	0	970	1,685
	Change	0	0	-715	168	0	-970	-1,517
Financial and professional services (A2)	Gain	0	0	0	0	0	0	0
	Loss	0	0	0	816	0	0	816
	Change	0	0	0	-816	0	0	-816
Food and drink uses (A3-A5)	Gain	0	0	0	220	0	0	220
	Loss	0	0	0	0	0	0	0
	Change	0	0	0	220	0	0	220
Mixed or flexible A Use Classes	Gain	0	0	0	0	0	0	0
	Loss	0	1,200	0	0	0	0	1,200
	Change	0	-1,200	0	0	0	0	-1,200
Offices (B1a)	Gain	0	25,360	0	439	0	0	25,799
	Loss	0	2,789	0	1,093	0	575	4,457
	Change	0	22,571	0	-654	0	-575	21,342
Research & development (B1b)	Gain	0	0	0	0	0	0	0
	Loss	610	0	0	0	0	215	825
	Change	-610	0	0	0	0	-215	-825
Light industry (B1c)	Gain	0	0	0	0	0	588	588
	Loss	0	690	0	0	0	129	819
	Change	0	-690	0	0	0	459	-231
General industry (B2)	Gain	4,830	0	0	0	0	0	4,830
	Loss	1,525	0	0	0	0	8,246	9,771
	Change	3,305	0	0	0	0	-8,246	-4,941
Storage and distribution (B8)	Gain	0	0	0	0	0	0	0
	Loss	0	0	3,369	0	0	0	3,369
	Change	0	0	-3,369	0	0	0	-3,369
Mixed or flexible B Use Classes	Gain	12,445	0	3,090	0	0	0	15,535
	Loss	0	0	0	0	0	1,637	1,637
	Change	12,445	0	3,090	0	0	-1,637	13,898
Sui generis industrial	Gain	0	0	0	0	0	0	0
	Loss	22,410	0	0	3,312	0	0	25,722
	Change	-22,410	0	0	-3,312	0	0	-25,722
Hotels (C1)	Gain	0	1,650	0	0	0	0	1,650
	Loss	0	0	0	0	0	0	0
	Change	0	1,650	0	0	0	0	1,650
Residential institutions (C2)	Gain	0	0	0	4,912	0	0	4,912
	Loss	0	0	0	9,000	1,750	0	10,750
	Change	0	0	0	-4,088	-1,750	0	-5,838
Non-residential institutions (D1)	Gain	0	3,483	0	9,310	0	17,223	30,016
	Loss	0	1,199	0	719	0	10,344	12,262
	Change	0	2,284	0	9,691	0	6,879	18,854

Bristol Business Development Survey 2022

Land Use and Use Class Category		Avonmouth and Bristol Port	Bristol City Centre	Inner East	Northern Arc	Other Areas	South Bristol	Bristol Total
Assembly and leisure (D2)	Gain	0	2,133	1,430	3,403	0	0	6,966
	Loss	0	1,843	759	200	0	0	2,802
	Change	0	290	671	3,203	0	0	4,164
Sui generis	Gain	0	0	0	0	0	0	0
	Loss	0	4,735	0	0	0	1,613	6,348
	Change	0	-4,735	0	0	0	-1,613	-6,348



## Appendix 2 – Summary table of development commitments

**Table 7 – business development planning permissions extant at 31 March 2022 which were under construction or not yet started (m²)**

Land Use and Use Class Category		Avonmouth and Bristol Port	Bristol City Centre	Inner East	Northern Arc	Other Areas	South Bristol	Bristol Total
Shops (A1)	Gain	0	1,497	0	2,000	2,644	3,361	9,502
	Loss	471	17,781	0	4,180	1,061	2,718	26,211
	Change	-471	-16,284	0	-2,180	1,583	643	-16,709
Financial & professional services (A2)	Gain	0	0	0	0	0	0	0
	Loss	0	971	0	0	0	0	971
	Change	0	-971	0	0	0	0	-971
Food and drink uses (A3-A5)	Gain	0	3,046	412	4,450	2,169	1,811	11,888
	Loss	0	992	0	0	336	715	2,043
	Change	0	2,054	412	4,450	1,833	1,096	9,845
Mixed or flexible A Use Classes	Gain	470	65,962	0	0	0	9,161	75,593
	Loss	0	24,089	0	0	0	11,200	35,289
	Change	470	41,873	0	0	0	-2,039	40,304
Offices (B1a)	Gain	0	175,395	1,288	1,000	1,049	10,438	189,170
	Loss	0	26,146	511	1,578	4,500	3,540	36,275
	Change	0	149,249	777	-578	-3,451	6,898	152,895
Research & development (B1b)	Gain	0	1,350	162	0	0	0	1,512
	Loss	0	0	0	0	0	0	0
	Change	0	1,350	162	0	0	0	1,512
Light industry (B1c)	Gain	0	82	162	791	1,500	2,595	5,130
	Loss	0	824	0	0	557	0	1,381
	Change	0	-742	162	791	943	2,595	3,749
General industry (B2)	Gain	23,846	0	0	0	400	0	24,246
	Loss	0	574	1,007	0	29,542	2,425	33,548
	Change	23,846	-574	-1,007	0	-29,142	-2,425	-9,302
Storage and distribution (B8)	Gain	75,566	0	0	0	0	500	76,066
	Loss	25,488	1,230	2,212	54,394	0	0	83,324
	Change	50,078	-1,230	-2,212	-54,394	0	500	-7,258
Mixed or flexible B Use Classes	Gain	6,982	0	5,470	0	0	908	13,360
	Loss	5,880	0	0	0	0	0	5,880
	Change	1,102	0	5,470	0	0	908	7,480
Sui generis industrial	Gain	2,605	0	820	1,892	258	315	5,890
	Loss	2,077	608	2,097	0	0	31,328	36,110
	Change	528	-608	-1,277	1,892	258	-31,013	-30,220
Hotels (C1)	Gain	4,522	55,693	0	0	639	0	60,854
	Loss	0	0	0	0	735	0	735
	Change	4,522	55,693	0	0	-96	0	60,119
Residential institutions (C2)	Gain	0	2,002	0	4,104	965	3,938	11,009
	Loss	0	3,565	0	1,200	3,407	0	8,172
	Change	0	-1,563	0	2,904	-2,442	3,938	2,837
Non-residential institutions (D1)	Gain	200	81,282	0	7,572	310	12,827	102,191
	Loss	0	13,877	880	1,271	0	6,707	22,735
	Change	200	67,405	-880	6,301	310	6,120	79,456

Bristol Business Development Survey 2022

Land Use and Use Class Category		Avonmouth and Bristol Port	Bristol City Centre	Inner East	Northern Arc	Other Areas	South Bristol	Bristol Total
Assembly and leisure (D2)	Gain	200	9,876	2,390	72,014	5,444	6,877	<b>96,801</b>
	Loss	0	0	0	9,777	0	17,906	<b>27,683</b>
	Change	200	9,876	2,390	62,237	5,444	-11,029	<b>69,118</b>
Sui generis	Gain	0	0	0	0	0	2,408	<b>2,408</b>
	Loss	0	4,625	0	0	5,474	956	<b>11,055</b>
	Change	0	-4,625	0	0	-5,474	1,452	<b>-8,647</b>

## Appendix 3 – Changes to Use Classes Order

**Table 8 – Changes to Business Development Survey Use Classes from 1 September 2020<sup>2</sup>**

Use Class category before 1/9/20	Use Class category from 1/9/20
A1 Shops <sup>3</sup>	E(a)
A2 Financial and professional services	E(c)
A3 Restaurants and cafes	E(b)
A4 Drinking establishments	Sui generis
A5 Hot food takeaways	Sui generis
B1(a) Offices	E(g)(i)
B1(b) Research & development	E(g)(ii)
B1(c) Light industry	E(g)(iii)
B2 General industry	No change
B8 Storage or distribution	No change
C1 Hotels	No change
C2 Residential institutions	No change
<b>D1 Non-residential institutions</b>	
D1(a) Doctors surgery, health centres	E(e)
D1(b) Creches, day centres	E(f)
D1(c) Schools	F.1(a)
D1(d) Art galleries	F.1(b)
D1(e) Museums	F.1(c)
D1(f) Public libraries	F.1(d)
D1(g) Public halls	F.1(e)
D1(h) Places of worship	F.1(f)
D1(i) Law courts	F.1(g)
<b>D2 Assembly and leisure</b>	
D2(a) Cinemas	Sui generis
D2(b) Concert halls	Sui generis
D2(c) Bingo halls	Sui generis
D2(d) Dance halls	Sui generis
D2(e) Swimming baths / skating rinks	F.2(d)
D2(e) Gyms / indoor sport	E(d)
D2(e) Outdoor sport	F.2(c)
D2(e) Indoor recreation	F.2(b) where it is a hall or meeting place for the principal use of the local community

<sup>2</sup> Source: <https://www.legislation.gov.uk/ukxi/2020/757/contents/made>

<sup>3</sup> Except shops whose premises are not more than 280m<sup>2</sup> in size, sell mostly essential goods including food and are at least 1km from another similar shop. These become Use Class F2(a).