Supply Analysis and Site Assessment

Employment Land Review Technical Paper

South Gloucestershire Council

January 2022

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1. Introduction to the Paper

Atkins have prepared a series of technical papers as part of the Employment Land Review (ELR) process for South Gloucestershire, which are intended to support and provide context to the main ELR report and the West of England Employment Land Spatial Needs Assessment (ELSNA).

This technical paper sets out a strategic analysis of the existing and potential supply of land which may be suitable for employment development within South Gloucestershire and its six constituent sub-zones. The paper takes a high-level approach, drawing on the findings of the ELSNA, and providing the background to the supply figures presented in the Core Report. The results of the analysis provide the basis upon which to consider the extent to which future supply can meet anticipated demand, offering a foundation from which to establish strategic development options for potential allocation and a broad strategic direction for employment growth. The supply-demand balancing exercise, undertaken by Functional Economic Market Area (FEMA), is presented in Section 3 of the Core Report. The FEMA demand analysis can be located in Technical Paper 1.

In addition, the supply analysis evaluates to what extent South Gloucestershire's existing portfolio of safeguarded employment sites continues to provide adequate functionality for businesses and operators, as well as attractive opportunities for key market sectors. This includes a total of 69 site assessment proformas, undertaken in collaboration by Atkins and South Gloucestershire Council (SGC). The completed site assessment proformas are located in a separate document for ease of reference, offering an in-depth analysis of the suitability of the existing sites to serve modern occupiers, as well as to contribute to South Gloucestershire's clean and inclusive development.

2. Site Assessment Proforma

This section sets out the site assessment methodology undertaken for this ELR study, including details of the existing employment sites that were evaluated. A site assessment proforma was developed jointly with the Council and agreed to ensure sites were assessed on a consistent basis. Appendix A contains an example proforma including guidance notes for site assessment.

It is recognised that this technical paper, and the wider ELR study, provides a 'snapshot in time' and that additional sites may come forward through the HELAA process which are not currently being considered in this ELR. These sites should be fully assessed in accordance with the criteria utilised in this ELR, as well as the policy and development management requirements of SGC. Subject to a reasonable degree of certainty of such sites being implemented, it may be necessary to take these into consideration when updating the supply estimates set out in this report.

2.1. Site for Consideration

A total of 58 employment land sites was submitted to Atkins for review by South Gloucestershire Council. These included two categories of sites, including:

- Category 1 – Existing sites with obvious potential for change;
- Category 2 – Existing sites with potential for change, if pushed by policy.

All sites submitted comprise Safeguarded and Interim Safeguarded employment sites, allocated in the South Gloucestershire Core Strategy (adopted in December 2013) Policy CS12: safeguarded areas for economic development. The Council's Policies, Sites and Places Development Plan (PSP) also supports the Core Strategy by providing guidance on Enterprise Areas (PSP26) and the location of B8 employment space (PSP27). For the purpose of this ELR, several sites were split into smaller site parcels for ease of assessment (SG-2 Almondsbury Business Park; SG-6 Land East of A38, Filton/Patchway; SG-12 Emersons Green; SG-23 Southway Drive, North Common; SG-45 Severnside Employment Area and SG-47 Cribbs Causeway).

The list of sites submitted was reviewed and a number of sites were subsequently removed as a result of being a duplicate site (SG-46 Employment Land at Filton Northfield) and loss to residential (SG-38 Council Offices, Thornbury and SG-54 Coopers Site). A total of 69 sites were subsequently assessed jointly by Atkins and South Gloucestershire Council, including the smaller site parcels.

Figure 2-1 – Distribution of Employment Sites Assessed

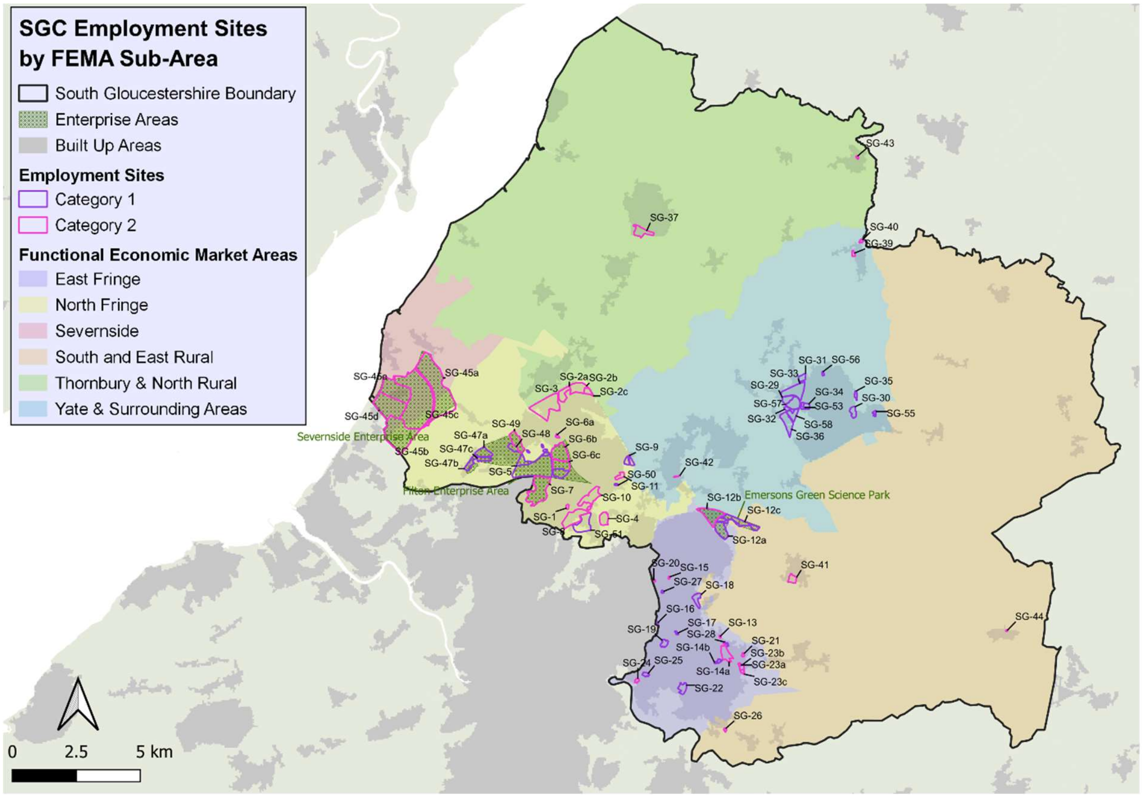

Table 2-1 sets out the number of sites assessed in each FEMA sub-zone, as identified in Chapter 3. This includes the aforementioned smaller site parcels. As demonstrated in the table, the majority of sites were located in the North Fringe, East Fringe and Yate and Surrounding Areas, with a small minority in South and East Rural and Thornbury and North Rural. Although the Severnside sub-zone contains 5 sites, these cover almost 634ha in total and therefore constitute a significant share of the overall employment land figure. The individual sites are presented by sub-zone in Table 2-2.

Table 2-1 – SGC Employment Sites Assessed by FEMA Sub-Zone

FEMA Sub-Zone	Number of Sites Assessed
East Fringe	18
North Fringe	24
Severnside	5
South and East Rural	4
Yate and Surrounding Areas	16
Thornbury and North Rural	2
Total	**69**

Table 2-2 – Site Assessments by FEMA Sub-Zone

FEMA Sub-Zone	Sites Subject to Assessment
North Fringe	1. SG-1 Abbey Wood Business Park
	2. SG-2a Almondsbury Business Park
	3. SG-2b Almondsbury Business Park
	4. SG-2c Almondsbury Business Park
	5. SG-3 Aztec West Business Park
	6. SG-4 Bristol Business Park
	7. SG-5 Employment Land at Filton Northfield
	8. SG-6a Land East of A38, Filton/Patchway
	9. SG-6b Land East of A38, Filton/Patchway
	10. SG-6c Land East of A38, Filton/Patchway
	11. SG-6d Land East of A38, Filton/Patchway
	12. SG-7 Land West of A38 and South of Hallen Railway Line
	13. SG-8 Ministry of Defence, Abbey Wood
	14. SG-9 Old Gloucester Road, Hambrook
	15. SG-10 Parkway Business Park
	16. SG-11 Parkway North Business Park
	17. SG-47a Cribbs Causeway
	18. SG-47b Cribbs Causeway
	19. SG-47c Cribbs Causeway
	20. SG-48 Jupiter Road
	21. SG-49 Patchway industrial Estate
	22. SG-50 Pearce/Auto Techniques Site
	23. SG-51 University of the West of England
	24. SG-52 Land West of A38 (inc. runway and Royal Mail site)
East Fringe	25. SG-12a Emersons Green
	26. SG-12b Emersons Green
	27. SG-13 Chapel Lane, Warmley
	28. SG-14a Tower Road, Warmley
	29. SG-14b Tower Road, Warmley
	30. SG-15 Bristol Uniforms Site
	31. SG-16 Oatley Trading Estate, Kingswood
	32. SG-17 The Civic Centre, Kingswood
	33. SG-18 Station Road, Kingswood
	34. SG-19 North of Douglas Road
	35. SG-20 Eclipse Office Park
	36. SG-21 McBraida Site
	37. SG-22 Longwell Green Industrial Estate
	38. SG-23a Southway Drive, North Common
	39. SG-23b Southway Drive, North Common
	40. SG-24 Hanham Business Park
	41. SG-25 Former Kleeneze Site
	42. SG-27 Hayward Industrial Estate
	43. SG-28 2-8 London Road, Warmley
	44. SG-45a Severnside Employment Area

Severnside	45. SG-45b Severnside Employment Area
	46. SG-45c Severnside Employment Area
	47. SG-45d Severnside Employment Area
	48. SG-45e Severnside Employment Area
South and East Rural	49. SG-26 Bath Road, Willsbridge
	50. SG-41 Pucklechurch Trading Estate
	51. SG-44 Sunguard Vivista Premises, Marshfield
	52. SG-12c Emersons Green
Yate and Surrounding Area	53. SG-29 Beeches Industrial Estate, Yate
	54. SG-30 Bowling Hill, Chipping Sodbury
	55. SG-31 Broad Lane, Yate
	56. SG-32 Council Offices, Badminton Road, Yate
	57. SG-33 Great Western, Business Park, Yate
	58. SG-34 Indesit Site, Station Road
	59. SG-35 The Ridge, Yate
	60. SG-36 Westerleigh Business Park
	61. SG-39 Arnold Fields Trading Estate, Wickwar
	62. SG-40 Old Cider Mill Trading Estate
	63. SG-42 Station Premises and Yard, Winterbourne
	64. SG-53 Badminton Court/Dairy Crest Site
	65. SG-55 Hatters Lane
	66. SG-57 Stover Road + North Road Industrial Estate
	67. SG-58 Badminton Road Trading Estate
Thornbury and North Rural	68. SG-37 Thornbury Industrial Estate
	69. SG-43 Station Road, Charfield

2.2. Site Assessment Proforma

In order to provide a comprehensive and consistent site appraisal, sites have been assessed on a range of strategic criteria. Aligned with national guidance, these criteria were developed in consultation with SGC and agreed at the beginning of the site assessment process to ensure consistency and to make the assessment as objective as possible.

The assessment proforma is structured in two parts. Whilst Part A considers baseline site information through a high-level narrative and descriptive commentary of site characteristics, Part B provides a qualitative assessment of site potential to meet sectoral demand and cross-cutting spatial needs, as well as opportunities to contribute to regeneration, economic recovery, and clean and inclusive growth.

2.2.1. Part A

A1. Site Context – Collates contextual information such as site typology, address, location and site area, in addition to relevant planning histories and existing or emerging policy status.

A2. Current Use – Considers the current role and sectors served by the site/cluster/location, the estimated amount of undeveloped land and the quality and fitness of purpose of existing sites and premises – including age and condition of stock, evidence of significant vacancies, suitability of buildings for modern occupiers, environmental conditions and parking provision where relevant.

A3. Description of Qualitative Features of Site – Using data primarily sourced from GIS and other secondary sources, this assessment considers strategic connectivity (including location and access relative to the strategic road, freight and passenger rail network, as well as other strategic transport hubs). In addition, access to public transport, the local highway/urban road network and town centres/local amenities are considered. The assessment of qualitative site features also examines digital connectivity, compatibility with neighbouring uses/the wider area and identifies any spatial or functional linkages.

2.2.2. Part B

Part B provides a range of strategic criteria for qualitative assessment, focused on establishing site potential to meet sectoral demand, as well as to contribute to clean and inclusive recovery and growth – including the scale of opportunity, strength of suitability, likely delivery timeframe and any requirements for infrastructure investment. In addition, Part B explores site potential to provide for emerging forms of workspace (such as flexible, co-worker space, incubator and start up hub space) in considering cross-sectoral spatial needs.

This section of the site proforma enables a conclusion to be reached on the extent to which a site/cluster or location offers strong strategic potential to contribute to employment and economic growth across South Gloucestershire. In addition to providing a rationale for the conclusion reached, recommendations have been to identify appropriate policy interventions for further testing through the plan-making process.

The site proforma for the purpose of assessing the South Gloucestershire site portfolio, as agreed with the client, is contained in Appendix A. The completed site proformas are contained in a separate combined document for ease of reference.

2.3. Suitability of Existing Sites

As previously stated, sites for assessment were provided by SGC. Within this, it was important to examine the ability of each site to be used by businesses with modern requirements, and thus the suitability of sites to be used as modern employment land. The site assessments involved a qualitative evaluation of the stock and suitability of each site across the four Unitary Authorities. The site assessment looked at the quality and fit for purpose of the existing sites, as well as the age and suitability of stock and the suitability of buildings for modern occupiers. As the EPC data in Table 2-3 demonstrates, a proportion of stock was deemed suitable for modern occupiers, with adequate specification for businesses to occupy, displaying market appeal and value to businesses. However, there will be a need for some investment and redevelopment of stock to meet modern occupier needs. From the site proforma data that was provided by the Unitary Authorities and site assessments undertaken by Atkins, it can be seen that even if the stock is regarded as being older on a site, at least some sections of the site had typically been redeveloped recently, which would be operational for modern occupiers.

Table 2-3 – EPC Data on SGC, WoE Stock Performance - Low EPC Rating Share

Area	Office	Industrial	Warehouse	Retail
South Gloucestershire	38%	37%	28%	34%
West of England	33%	31%	26%	28%

Some of the sites identified have at least one form of significantly ageing stock across the Unitary Authority, typically industrial/trading estates in out-of-centre and rural locations – for instance at Wickwar and in the East Fringe at Hayward Industrial Estate, Warmley and Hanham Business Park. These sites tend to be made up of ageing, traditional and low-spec industrial stock, with a significant reconfiguration needed to deliver viable premises to meet the market and sector needs of more modern and larger-scale occupiers. Redevelopment of such sites should be encouraged in the long term to attract modern occupiers and a diverse range of employment activity. It is noted that lack of redevelopment does not necessarily indicate that this is unviable, but particularly in urban areas, this may indicate residential 'hope' value at play.

In line with priorities for the West of England, the majority of the sites assessed have started to recognise the need for clean inclusive growth and therefore incorporate efforts to transition towards low carbon by improving the efficiency of existing premises; whether that be office or industrial stock. Other cross-sectoral spatial priorities considered included provision for SMEs and start-ups, with some major employment locations like Severnside deemed inappropriate for such uses, despite their significance for larger businesses, for instance due to the lack of affordable public transport provision and limited provision of local amenities.

This section is intended to provide a brief strategic overview of the suitability of South Gloucestershire's profile of existing sites to serve existing uses and modern occupiers. For a detailed analysis, the proforma document contains the completed site assessment proformas for all 69 employment sites across South Gloucestershire, analysing each site's potential to meet sectoral demand for a range of key market sectors, as well as to contribute to clean and inclusive growth. This also includes constraints and infrastructure requirements for future development, in addition to policy recommendations and interventions for consideration by SGC.

3. Future Supply

This section provides a strategic review of the existing and potential supply of land which may be suitable for employment development within South Gloucestershire. The results of the analysis provide the basis upon which to consider the extent to which future supply can meet anticipated demand, offering a foundation from which to establish strategic development options for potential allocation and a strategic direction for employment growth.

The analysis considers historical completions and patterns of loss/gain in employment stock to provide context and identify significant trends in the supply of employment land for South Gloucestershire, before calculating the future supply of employment land across the Unitary Authority by FEMA sub-zone, considering quantitative data on extant permissions for commercial floorspace and available land on existing employment allocations without permission.

3.1. Use Classes

The Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020 came into effect in September 2020. The changes implemented were three new Use Classes (as seen in Table 3-1 below). For the purposes of this supply analysis, all calculations are presented in both the traditional and new Use Classes. However, the pipeline supply data submitted by each of the Unitary Authorities has not incorporated these new Use Classes, due to the planning applications being submitted and approved with the traditional Use Classes.

Table 3-1 – Use Class Update, September 2020

<table>
<tr><th>Traditional Use Classes</th><th>Traditional Use Classes</th><th>New Use Classes (as of Sep 2020)</th></tr>
<tr><td rowspan="2">Office</td><td>A2</td><td rowspan="7">E</td></tr>
<tr><td>B1a</td></tr>
<tr><td>R&D</td><td>B1b</td></tr>
<tr><td rowspan="3">Retail</td><td>A1</td></tr>
<tr><td>A2</td></tr>
<tr><td>A3</td></tr>
<tr><td rowspan="2">Industrial</td><td>B1c</td></tr>
<tr><td>B2</td><td>B2</td></tr>
<tr><td>Storage & Distribution</td><td>B8</td><td>B8</td></tr>
<tr><td rowspan="5">Other</td><td>C1</td><td>C1</td></tr>
<tr><td>C2</td><td>C2</td></tr>
<tr><td>D1</td><td>F.1/E</td></tr>
<tr><td>D2</td><td>F.2/E</td></tr>
<tr><td>Sui Generis</td><td>Sui Generis</td></tr>
</table>

Source: Government Guidance on New Use Class Orders, September 2020

As Table 3-1 illustrates, a new E Class – a general “commercial, business and service” use class – absorbs previous classes A1, A2, A3, B1 and parts of D1 and D2 and covers retail, food, financial services, indoor sport and fitness, medical or health services, nurseries, offices and light industry. This allows a change from one use to another without the need for planning permission. Furthermore, new regulations recently consulted on propose that any use in Class E can change to residential without the need for planning permission. It is likely that employment sites in the West of England will be redeveloped for residential use due to these changes to the Use Class Order, as well as Permitted Development Rights, particularly near high-value residential areas. This may have significant impacts on the supply of employment land in the sub-region. As a result, there may be a need to safeguard a ‘reservoir’ of employment land provision to compensate for any potential decline in future supply within the four Unitary Authorities going forward. Crucially however, this must align with the NPPF requirement to promote the development of underutilised land, especially if this would help to meet identified needs for housing where land supply is constrained. This issue is considered further within the ELR Core Report.

3.2. Plot Ratios

Plot ratios are used to convert gross internal floor area (GIFA) into hectares, with the majority of the data provided for the supply analysis (see below) by SGC being GIFA, and therefore in square meters. The conversion was required for the ELSNA, and thus the explanation is replicated in this document for consistency.

Table 3-2 – Plot Ratios Used for the ELSNA

Use Type	Plot Ratios			
	BANES	**BCC**	**NS**	**SGC**
Office	80%	100%	60%	80%
Research & Development	60%	60%	50%	50%
Industrial	40%	40%	40%	40%
Storage & Distribution	50%	50%	50%	50%
Retail	70%	70%	70%	70%

Source: Atkins use of HCA and ODPM guidance and wider research

No single employment density or plot ratio can be easily applied, especially in the strategic context of the ELR covering a wide basis of employment space and locations.

For office development in particular, plot ratios vary significantly depending on the nature and intensity of development. The employment land review guidance recognises there is a clear difference between plot ratios expected at business parks, with car parking and landscaping, and town centre office space containing more and higher storeys occupying the majority of a plot and with significantly higher plot utilisations possible. This has a significant implication on the land requirement. Research referenced in previous ODPM employment land review guidance[1] showed business park plot ratios of 0.25 to 0.4 and town centres with 0.75 to 2.

For most industrial and warehousing development, ratios of 0.4 – 0.5 are well used for employment land reviews, with research referenced in the ODPM guidance showing 0.35 - 0.45 and 0.4 - 0.6 respectively.

The Bristol Business Development Survey (2018) provides data on completions for 2017-18 with both site areas and employment floorspace. Using sites with only office use, the sample of 14 sites showed plot ratios of between 0.6 and 5.9, with an average 2.6 though this is a limited sample. It is generally recognised Bristol, and to some degree Bath, have higher office plot ratios than the wider West of England area.

A further reference point is provided by the Greater London Authority in the London employment sites database[2], where outer London boroughs were recommended to use plot ratios of 0.9 for office space and 0.65 for other uses.

Assumptions have been made with consideration of available reference points. The assessment also translates the quantitative assessment of employment land supply to the updated use class regulations which came into effect in September 2020[3], as:

- E class – business, commercial, service
- B2-class - industrial

[1] Office of the Deputy Prime Minister, *Employment Land Reviews: Guidance Note* (2004)
[2] GLA, *London Employment Sites Database (LESD)*, 2017
[3] The Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020

- B8-class - storage and distribution
- Other – C1, C2, F1, F2

It is recognised that some of the employment densities may change going forward, where office space may be less densely used through the future of work (driver of change) whilst technological advancements will impact the use of research and development and industrial space.

3.3. Historical Completions

Historical completions up to the base date of the plan period were taken into account to form part of the context for explaining the employment land development capacity for the sub-region. Atkins have utilised the information provided by South Gloucestershire Council to estimate supply from completed development within the Unitary Authority by FEMA sub-zone. In light of the South Gloucestershire Council's proposed Local Plan, completions analysis is presented over the period from 2006 to 2019 for the purpose of providing comparator data. However, analysis cannot be done for the West of England total and therefore SGC as a percentage of the total, as not all of the other Unitary Authorities provided data for the whole of the date range. More information on historical completions can be found in the ELSNA, with analysis based upon the date range 2011 to 2018, due to all Unitary Authorities providing data on this range. Completions are important to analyse, as they highlight the capacity of each FEMA sub-zone, and South Gloucestershire as a whole, to deliver employment land. Whilst completions do not directly influence future supply, it is useful in providing an idea of how much development has occurred in each FEMA sub-zone over the last decade, providing a proxy for market demand and benchmark for delivery capacity based on historical market conditions and existing infrastructure provision.

The following tables provide a total for the time period 2006 to 2019 as this is the data that was supplied by SGC which corresponds to information collated for the Core Strategy. The data is presented as a total for the net square meters of completed developments by use class (further information on what is included within each use class category can be found in Section 3.1) that have occurred during the time period, as well as raw completions, which is the total number of completions that occur in each FEMA sub-zone. For completions which have multiple uses, for instance B1a and B1c, these have been double counted in both Office and Industrial for raw completions, although this does not significantly impact the total figures.

The completions that occurred in each FEMA sub-zone during the period 2006-2019 by the traditional use classes are presented in Table 3-3 and Table 3-4. Based on the information provided by the Council, a total of 1,291,498 sqm of employment floorspace has been completed during the time period. This figure is dominated by the completions within the North Fringe, with just under 480,000 sqm of the total. The type of use class being completed was other, with office, retail and industrial also being significantly important. Severnside also experienced major completions of employment developments, with over 80% of these being storage and distribution. This covers the majority of total storage and distribution completions with the Unitary Authority, and this use class was the highest type for completions. Other use classes were the second largest, with the East Fringe and the South and East Rural contributing a significant amount of completed developments, along with the North Fringe (as previously discussed).

There were 478 competed developments within the time period, with the North Fringe and East Fringe contributing the most (158 and 131 respectively), but the South and East Rural also having close to 100 completions as well. Yate and the Surrounding Area had some 50 completions within the time period; however, this were of a smaller scale than some of the other FEMA sub-zones. This was the case for Thornbury and North Rural, with only 23 completions. Interestingly, the number of raw completions that were identified as in the industrial use class were higher than storage and distribution, but in square meters there were double the amount for storage and distribution. This highlights the size of each storage and distribution development, with the lowest number of completions occurring in Severnside further supporting this point.

Table 3-3 – Completions by FEMA and Use Class from 2006 – 2019 (sqm)

FEMA Sub-Zone	Office	R&D	Industrial	Storage & Distribution	Retail	Other	Total
East Fringe	34,160	19,407	30,978	24,175	26,116	68,162	202,998
North Fringe	101,758	11,532	71,883	31,722	82,787	179,499	479,181
Severnside	724	0	66,312	315,398	0	0	382,434
South and East Rural	6,528	250	12,300	20,758	9,849	71,174	120,859
Thornbury and North Rural	4,245	0	4,869	1,446	1,029	4,716	16,305
Yate and Surrounding Area	13,268	0	15,047	11,844	22,594	26,968	89,721
South Gloucestershire	**160,683**	**31,189**	**201,389**	**405,343**	**142,375**	**350,519**	**1,291,498**

Source: Data provided by SGC and analysed by Atkins

Table 3-4 – Completions by FEMA and Use Class from 2006 – 2019 (Raw Completions)

FEMA Sub-Zone	Office	R&D	Industrial	Storage & Distribution	Retail	Other	Total
East Fringe	16	3	24	18	20	50	131
North Fringe	23	2	16	14	35	68	158
Severnside	2	0	7	12	0	0	21
South and East Rural	8	1	24	27	6	29	95
Thornbury and North Rural	5	0	9	4	2	3	23
Yate and Surrounding Area	5	0	10	10	11	14	50
South Gloucestershire	**59**	**6**	**90**	**85**	**74**	**164**	**478**

Source: Data provided by SGC and analysed by Atkins

Table 3-5 and Table 3-6 show the historical completions by FEMA sub-zone for each new use class (a re-presentation of the data above). This shows that the North Fringe and East Fringe saw the most completions in terms of square meters and raw figures for E use classes. The 'Other' use class is close to being the same for both traditional and new use classes, with the only difference being 'Other' for the new use class includes A4 and A5 use classes. B8 is, by definition, the same as storage and distribution. The completions for B2 use class were highest for the North Fringe and Severnside in terms of square meters, with the range of raw completions for each FEMA sub-zone being 7 to 15. This indicates that all the completions in industrial type of use classes being in the heavy industry for the Severnside, with most of the completions being heavy industry for the North Fringe.

Table 3-5 – Completions by FEMA and New Use Class from 2006 – 2019 (sqm)

FEMA Sub-Zone	E	B2	B8	Other (F.1/F.2/SG)	Total
East Fringe	87,209	23,452	24,175	68,162	202,998
North Fringe	198,134	69,203	31,722	180,122	479,181
Severnside	724	66,312	315,398	0	382,434
South and East Rural	22,217	6,614	20,758	71,270	120,859
Thornbury and North Rural	5,716	4,427	1,446	4,716	16,305
Yate & Surrounding Area	41,552	8,202	11,844	28,123	89,721
South Gloucestershire	**355,552**	**178,210**	**405,343**	**352,393**	**1,291,498**

Source: Data provided by SGC and analysed by Atkins

Table 3-6 – Completions by FEMA and New Use Class from 2006 – 2019 (Raw Completions)

FEMA Sub-Zone	E	B2	B8	Other (F.1/F.2/SG)	Total
East Fringe	48	15	18	50	131
North Fringe	61	13	14	70	158
Severnside	2	7	12	0	21
South and East Rural	23	15	27	30	95
Thornbury and North Rural	8	8	4	3	23
Yate and Surrounding Area	13	9	10	18	50
South Gloucestershire	**155**	**67**	**85**	**171**	**478**

Source: Data provided by SGC and analysed by Atkins

The average annual historical completions are shown below in Table 3-7, by use class in square meters for each FEMA sub-zones, as well as a total for South Gloucestershire. This highlights the significant uptake of storage and distribution in Severnside compared to the other sub-zones. The North Fringe has significant completions in office, industrial, retail and other types of employment use class over the past 13 years. However, there is a notable lack of annual completions in Thornbury and North Rural sub-zone compared to the rest of South Gloucestershire. The East Fringe also has significant annual completions, with all use classes having some completions, and the other use class seeing the most within the sub-zone. For the whole of South Gloucestershire, the total for annual completions is 99,346 sqm.

Table 3-7 - Average Annual Historical Completions by Use Class from 2006-2019 (sqm)

FEMA Sub-Zone	Office	R&D	Industrial	Storage & Distribution	Retail	Other	Total
East Fringe	2628	1493	2383	1860	2009	5243	15,615
North Fringe	7828	887	5529	2440	6368	13,808	36,860
Severnside	56	0	5101	24,261	0	0	29,418
South and East Rural	502	19	946	1597	758	5475	9297
Thornbury and North Rural	327	0	375	111	79	363	1254
Yate and Surrounding Area	1021	0	1157	911	1738	2074	6902
South Gloucestershire	12,360	2399	15,491	31,180	10,952	26,963	99,346

Source: Data provided by SGC and analysed by Atkins

The overall aim of this section was to paint a picture of historical completions / take-up rates for each FEMA sub-zone roughly over the last 13 years. Over this period, the drivers for completions in employment land developments has been storage and distribution, with the bulk of that occurring in the Severnside sub-zone. There have also been relatively significant completions in developments of other use classes e.g., care homes and leisure facilities, with this mainly occurring in the North Fringe. The North Fringe also saw a high number of completions in office employment space, as well as the East Fringe.

3.4. Extant Permission for B Use Class Floorspace

3.4.1. Consents

Consented pipeline opportunities may be delivered and thereby affect the overall supply of commercial stock in South Gloucestershire. The Council have provided a schedule of planning permissions that have been approved, including planning permissions for both new commercial space and the loss of existing. The data has been provided from March 2020. It is important to consider both to ensure a robust understanding of the office, industrial and warehousing supply in future and consider any loss of employment sites to other uses.

Atkins have exclusively relied on the information provided by the Council to estimate consented supply and no engagement with landowners and developers in respect of these sites has taken place as part of this Study. The Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020 came into effect in September 2020. Consequently, the permitted supply data submitted by the Council did not take account of the new use classes, but for the purpose of this Study, the consented supply pipeline has been interpreted in terms of the new use classes. The data is presented by each FEMA sub-zone, as identified in Section 2.1, as well as a total for the West of England that is taken from the West of England Combined Authority Employment Land Spatial Needs Assessment which is then used to get a percentage for South Gloucestershire.

The overall gain or loss in gross internal floor area or hectares are shown below in Table 3-8 and Table 3-9, by use classes and Unitary Authority. Information on the split between traditional and new use class can be seen in Section 3.1. In addition, information on how plot ratios have been used to determine the total hectares for each FEMA sub-zone from the gross internal floor area is presented in Section 3.2. Plot ratios are used to convert Table 3-8 into Table 3-9, as converting all the data into hectares enabled a more consistent approach to the supply analysis. However, it is important to note that the conversions are sensitive to the plot ratio assumptions applied.

The pipeline supply figures indicate the gains or losses in GIFA or hectares by use class for South Gloucestershire, as well as showing the change for each FEMA sub-zone. The figures, which factor in unimplemented schemes which will lead to a loss of employment land, are separated into Office, R&D, Retail, Industrial, Storage and Distribution and other uses. The overall net gain in GIFA and ha by use class order based off pipeline supply is a total of 41.73ha employment consented floorspace in South Gloucestershire, including 20.50ha storage and distribution space which makes up almost 80% of the total for the West of England. South

Gloucestershire will also see a loss in industrial floorspace, with the rest of the West of England seeing a gain. South Gloucestershire makes up just under 50% of total consented supply in the West of England as of 2020.

Severnside FEMA sub-zone has 18.36ha of storage and distribution employment space in the pipeline, being the main area of gains in that type of employment land. It is also expected to see some gain in office employment space. The North Fringe will see the most significant gain in office employment land, with just over 8ha in the pipeline. The North Fringe and East Fringe are also the main locations for R&D, retail and other use employment land gains in South Gloucestershire, with the East Fringe also seeing significant gains in office employment land. However, the East Fringe has a net loss of 1.40ha in industrial land in the pipeline. The South and East Rural FEMA sub-zone will see a small increase in both industrial and storage and distribution employment land. The remaining two FEMA sub-zones (Thornbury and North Rural and Yates and Surrounding Areas) do not have a significant change in employment land from the consents data.

Table 3-8 – Net Floorspace Change (in GIFA) by FEMA Sub-Zone and Use Class

FEMA Sub-Zone	Office (sqm)	R&D (sqm)	Industrial (sqm)	Storage & Distribution (sqm)	Retail (sqm)	Other (sqm)	Total (sqm)
East Fringe	25,292	20,900	-34,876	18,470	21,832	39,375	90,993
North Fringe	100,626	14,491	19,282	9,439	18,177	47,311	209,326
Severnside	15,860	0	16,511	374,742	1,375	3,710	427,338
South and East Rural	1,000	1,980	9,181	4,731	0	1,406	18,298
Thornbury and North Rural	-353	337	1,648	1,206	375	968	4,181
Yate and Surrounding Area	-297	0	-376	8,940	-254	-543	7,470
South Gloucestershire	**142,128**	**37,708**	**11,370**	**409,958**	**41,505**	**92,227**	**734,896**
% of total WoE	37.2%	79.9%	11.9%	79.3%	43.3%	37.1%	53.0%
West of England	**381,767**	**47,207**	**95,202**	**516,815**	**95,918**	**248,900**	**1,385,809**

Source: Data provided by SGC and analysed by Atkins

Table 3-9 – Net Change in Hectares by FEMA Sub-Zone and Use Class

FEMA Sub-Zone	Office (ha)	R&D (ha)	Industrial (ha)	Storage & Distribution (ha)	Retail (ha)	Other (ha)	Total
East Fringe	2.02	1.05	-1.40	0.92	1.53	1.97	6.09
North Fringe	8.05	0.72	0.77	0.47	1.27	2.37	13.66
Severnside	1.27	0.00	0.66	18.36	0.10	0.19	20.57
South and East Rural	0.08	0.10	0.37	0.24	0.00	0.07	0.85
Thornbury and North Rural	-0.03	0.02	0.07	0.06	0.03	0.05	0.19
Yate and Surrounding Area	-0.02	0.00	-0.02	0.45	-0.02	-0.03	0.36
South Gloucestershire	**11.37**	**1.89**	**0.45**	**20.50**	**2.91**	**4.61**	**41.73**
% of total WoE	33.2%	76.5%	11.9%	79.3%	43.3%	37.1%	48.8%
West of England	**34.30**	**2.46**	**3.81**	**25.84**	**6.72**	**12.45**	**85.58**

Source: Data provided by SGC and analysed by Atkins

Table 3-10 and Table 3-11 show the overall gain or loss in gross internal floor area (GIFA) or hectares for South Gloucestershire and the FEMA sub-zones by new use class. These indicate which area within South Gloucestershire will experience gains or losses in new use class from the consents data. The net gain figures, which factor in unimplemented schemes which will lead to a loss of employment land, are separated into Class E, B2, B8 and other uses.

Table 3-10 – Net Floorspace Change (in GIFA) by FEMA Sub-Zone and New Use Class

FEMA Sub-Zone	E Business Service, Commercial (sqm)	B2 Industrial (sqm)	B8 Storage & Distribution (sqm)	F.1/F.2 Other (sqm)	Total (sqm)
East Fringe	72,223	-38,125	18,470	39,375	91,943
North Fringe	143,074	9,502	9,439	47,311	209,326
Severnside	24,446	8,129	367,172	3,710	403,457
South and East Rural	9,412	2,749	4,731	1,406	18,298
Thornbury and North Rural	606	1,401	1,206	968	4,181
Yate and Surrounding Area	495	-1,422	8,940	-543	7,470
South Gloucestershire	**250,256**	**-17,766**	**409,958**	**92,227**	**734,675**
% of total WoE	43.7%	-37.6%	79.3%	37.1%	53.0%
West of England	**572,430**	**47,261**	**516,815**	**248,900**	**1,385,405**

Source: Data provided by SGC and analysed by Atkins

Table 3-11 – Net Change (in Hectares) by FEMA Sub-Zone and New Use Class

FEMA Sub-Zone	E Business Service, Commercial (ha)	B2 Industrial (ha)	B8 Storage & Distribution (ha)	F.1/F.2 Other (ha)	Total (ha)
East Fringe	4.79	-1.53	0.92	1.97	6.16
North Fringe	10.44	0.38	0.47	2.37	13.66
Severnside	1.62	0.33	18.36	0.19	20.49
South and East Rural	0.44	0.11	0.24	0.07	0.85
Thornbury and North Rural	0.02	0.06	0.06	0.05	0.19
Yate and Surrounding Area	0.00	-0.06	0.45	-0.03	0.36
South Gloucestershire	**17.31**	**-0.71**	**20.50**	**4.61**	**41.71**
% of total WoE	38.1%	-37.6%	79.3%	37.1%	48.7%
West of England	**45.39**	**1.89**	**25.84**	**12.45**	**85.58**

Source: Data provided by SGC and analysed by Atkins

3.4.2. Employment Land Losses

There is expected to be some employment land that is lost through consented development. The previous section shows the net change in employment land that is in the development pipeline with planning consent, with this section purely highlighting the employment land that will be lost from these developments. It tends to be different developments with planning consent that experience loss of one type of use class for the gain in another e.g. a development changes use class from industrial to offices. However, there are a few cases of developments losing one type of use class for the same use class to be part of the planning development, and thus there is also a gain in that use class. By analysing employment land losses from developments that have planning consent, this will enable further understanding on what is occurring within each FEMA sub-zone in terms of what use classes are experiencing employment land loss, irrespective of whether they are experiencing gains from other developments.

The following tables use the consent data that was also part of the analysis in Section 3.4.1. There is not a significant amount of employment land losses expected in South Gloucestershire, with approximately 3.6ha projected to be lost. Table 3-12 shows the employment land losses by FEMA sub-zone, with the East Fringe seeing a significant loss in industrial land of 2.35ha, with the total industrial land lost for South Gloucestershire being 33% of the total for the West of England. There is not much significant employment land losses expected in the other FEMA sub-zones, with only the East Fringe and North Fringe expecting a relatively significant loss in office space.

Table 3-12 – Employment Land Losses by FEMA Sub-Zone and Use Class (ha)

FEMA Sub-Zone	Office (ha)	R&D (ha)	Industrial (ha)	Storage & Distribution (ha)	Retail (ha)	Other (ha)	Total
East Fringe	0.22	0.00	2.35	0.13	0.08	0.07	2.85
North Fringe	0.29	0.00	0.06	0.00	0.03	0.00	0.38
Severnside	0.03	0.00	0.00	0.00	0.00	0.00	0.03
South and East Rural	0.00	0.00	0.00	0.00	0.00	0.03	0.03
Thornbury and North Rural	0.03	0.00	0.02	0.02	0.00	0.05	0.11
Yate and Surrounding Area	0.09	0.00	0.08	0.02	0.02	0.04	0.25
South Gloucestershire	0.67	0.00	2.51	0.16	0.13	0.18	3.65
% of total WoE	4.6%	0.0%	33.2%	9.4%	8.6%	6.1%	12.8%
West of England	**14.53**	**0.37**	**7.55**	**1.71**	**1.49**	**2.97**	**28.63**

Source: Data provided by SGC and analysed by Atkins

It is a similar case for employment land lost through consented development by new use class, with the East Fringe seeing a significant loss in industrial land, as well as seeing a relatively significant loss in E employment land along with the North Fringe.

Table 3-13 shows that the other FEMA sub-zones are not expected to see any other significant employment land losses. The total for employment land lost in South Gloucestershire is slightly lower when in new use classes, as new use classes do not include A4 or A5 (types of retail), whereas these are included in retail in Table 3-12.

Table 3-13 – Employment Land Losses by FEMA Sub-Zone and New Use Class (ha)

FEMA Sub-Zone	E Business Service, Commercial (ha)	B2 Industrial (ha)	B8 Storage & Distribution (ha)	F.1/F.2 Other (ha)	Total (ha)
East Fringe	0.23	2.35	0.13	0.07	2.78
North Fringe	0.33	0.06	0.00	0.00	0.38
Severnside	0.03	0.00	0.00	0.00	0.03
South and East Rural	0.00	0.00	0.00	0.03	0.03
Thornbury and North Rural	0.03	0.02	0.02	0.05	0.11
Yate and Surrounding Area	0.11	0.08	0.02	0.04	0.25
South Gloucestershire	**0.74**	**2.51**	**0.16**	**0.18**	**3.58**
% of total WoE	4.3%	36.0%	9.4%	6.1%	12.5%
West of England	**16.97**	**6.97**	**1.71**	**2.97**	**28.63**

3.5. Available Supply on Existing Allocations

Existing allocations in South Gloucestershire are set out in the Council's Core Strategy and Policies, Sites and Places Development Plan, which identify 58 Safeguarded and Interim Safeguarded Sites in Policy CS11 and CS12 of the Council's Core Strategy. Policy CS11 safeguards a total of 1,267 ha across 45 sites concentrated in the south of the authority area, the majority of which is located in the North and East Fringe of Bristol urban area and Severnside, with some employment supply maintained at Yate and Chipping Sodbury, Thornbury and the rural area. In addition, Policy CS12 identifies a further 13 Interim Safeguarded Sites, including land within the Filton Enterprise Area, the University of West England site and Land West of A38, whilst Policy CS13 currently protects employment uses on non-safeguarded employment sites.

Existing safeguarded sites are allocated for storage and distribution uses by Policy PSP 27 Storage and Distribution, which provides for B8 uses of any size, including those above 3000 sqm at Severnside; Cribbs Causeway and Land off A38 Filton/Patchway and Emersons Green (excluding the Science Park), whilst Policy PSP28 encourages business development outside the defined urban areas and settlement boundaries. A significant proportion of the total land allocated for employment in South Gloucestershire, in particular on the Council's safeguarded sites, has been delivered or is already consented. In addition to this, further (unconsented) available land has been calculated on the 69 employment sites submitted to Atkins, through desk-based site assessments and analysis of previous Authority Monitoring Reports, and represents the quantum of land available for employment uses (without extant permissions) on these sites. A supply data spreadsheet provided to SGC contains this data for reference, presented by site.

Table 3-14 and Table 3-15 below set out an overview of the available land without permission within the Unitary Authority (by traditional Use Class and new Use Class respectively) and identifies a total of 212.44ha. The majority of this available land is dominated by available storage and distribution space at Severnside. However, as this section discusses, the supply of land here is declining rapidly, in addition to a number of constraints on future delivery. Crucially, it is important to note that the available land figures for Severnside do not account for the potential requirement for an exclusion zone surrounding the gas storage units located here at present. According to stakeholder engagement, several of the plots on the Central Park site were purchased on the basis that these storage units were to be decommissioned. However, the storage units have recently been purchased and are proposed for recommission. This could sterilise a proportion of the land at Severnside and may limit potential land use changes. This situation will require consistent monitoring to ensure an accurate representation of available supply at Severnside.

Table 3-14 – Available Land on Existing Allocations by FEMA and Use Class (ha)

FEMA Sub-Zone	Office (ha)	R&D (ha)	Industrial (ha)	Storage & Distribution (ha)	Retail (ha)	Other (ha)	Total
East Fringe	0	0	4.15	0	0	0	4.15
North Fringe	3.6	3.39	3.36	0	1.69	0	12.04
Severnside	0	13.4	25.8	140.5	1.2	11.7	192.6
South and East Rural	0	0	0	3.1	0	0	3.1
Thornbury and North Rural	0	0	0	0	0	0	0
Yate and Surrounding Area	0	0	0.55	0	0	0	0.55
South Gloucestershire	**3.6**	**16.79**	**33.86**	**143.6**	**2.89**	**11.7**	**212.44**
% of total WoE	14%	60%	55%	90%.	21%	55%	70%
West of England	**25.7**	**27.82**	**60.84**	**159.01**	**7.16**	**21.41**	**301.94**

Table 3-15 – Available Land on Existing Allocations by FEMA and New Use Class (ha)

FEMA Sub-Zone	E (ha)	B2 (ha)	B8 (ha)	F1/F2 (Other) (ha)	Total
East Fringe	0.75	3.4	0	0	4.15
North Fringe	9.49	2.55	0	0	12.04
Severnside	29.97	10.43	140.5	11.7	192.6
South and East Rural	0	0	3.1	0	3.1
Thornbury and North Rural	0	0	0	0	0
Yate and Surrounding Area	0	0.55	0	0	0.55
South Gloucestershire	**40.21**	**16.93**	**143.6**	**11.7**	**212.44**
% of total WoE	46%	50%	90%	55%	70%
West of England	**87.94**	**33.58**	**159.01**	**21.41**	**301.94**

Office Supply

Future office supply in South Gloucestershire remains critically low, with 3.6ha of available land appropriate for office development. This represents just 1.7% of total available land on existing allocations within the Unitary Authority. At present, all of this land is located in the North Fringe, with no capacity in the other FEMA sub-zones beyond the consented accommodation discussed in Section 3.4. This represents the greatest shortfall of future provision across the Use Classes, apart from retail.

Established office park locations, such as Aztec West Business Park in Almondsbury and Bristol Business Park in Stoke Gifford, are almost at full capacity and not likely to offer considerable future supply. The 3.6ha in the North Fringe includes the last remaining 2.95ha at Aztec West, as well as a small-scale potential provision at Old Gloucester Road in Hambrook. The main problem in Bristol North Fringe, however, has been a lack of speculative development due to a lack of viable employment land supply and because urban centres represent more lucrative development prospects, whereas Bristol North Fringe occupiers are cost-orientated business facing functions. However, the North Fringe is expected to benefit from public transport improvements outlined in the WECA Transport Delivery Plan, including development of a new train station enhancing connectivity with Bristol, which will boost its attractiveness as a potential office location for national and regional businesses. Crucially, potential floorspace is likely to be a more relevant metric than land for office supply, due to the likelihood of increasing heights and therefore plot ratios in excess of 1. So, in effect locations such as the North Fringe could yield more sqm than anticipated.

This low supply of available land for office uses is partially offset by the 11.37ha of consents, which are also focused on the North Fringe, in addition to some limited supply in the East Fringe and Severnside. However, South Gloucestershire is not currently well positioned to absorb the demand from the urban Bristol market when the existing consented accommodation reaches capacity – predominantly due to a lack of available office space. At present, the majority of total available land for development in the Unitary Authority is situated at Severnside, which is unlikely to experience demand for office space and smaller units, due to its distance from residential units and poor provision of amenities. There is a negative view of Severnside due to the industrial character of the area and its association with dirty industries. The area has some potential for distribution depots and large-scale manufacturing activity, but cannot be considered as an all-purpose supply of employment land.

Market engagement identified the role of COVID-19 on accelerating existing trends for working from home. Requirements for office space in central areas are likely to be maintained, however there is also likely to be increased demand for a hub-and-spoke model approach to working – including suburban sites to supplement central offices. The flexible and co-working office market has matured into a major sector in Bristol in recent years, though this activity is yet to be replicated in South Gloucestershire. For instance, examples of such schemes in Almondsbury have struggled due to a lack of an established market. Stakeholder engagement indicated that there may be some demand for SME take-up of high street retail units for flexible office space in the short-term, owing to the changes to the Use Class Order discussed in Section 3.1.

Industrial Supply

As with storage and distribution, South Gloucestershire's supply of available land for industrial uses is dominated by the Severnside Employment Area. However, the stakeholder engagement process highlighted issues relating to the level of supply currently at Severnside. While the quantity of supply for Severnside may appear significant on paper, it was argued that this disguise various constraints. Firstly, there is intensifying pressure on Severnside to accommodate growth, with increasing numbers of applications within the CS12 allocation. As a result, the level of supply is declining rapidly, exacerbated by the fact that occupiers at Severnside are predominantly seeking large-scale sites for distribution purposes, which thus adds pressure on the remaining capacity of the allocation. Secondly, it is anticipated that a significant proportion of existing available land for development at Severnside is unlikely to come forward in the timescales required to meet market requirements. One proposal to address the shortfall of supply at Severnside was to begin looking to sites beyond the original CS12 allocation, in order to expand the development area and benefit from its strategic location – as considered in the Core Report.

Indeed, Severnside cannot be considered as a solution to the industrial supply pressures elsewhere in South Gloucestershire and the wider West of England region (including the significant shortfall identified in Bristol within the ELSNA), with very limited supply in all other FEMA sub-zones. Severnside represents a key location for large footprint, purpose-built manufacturing facilities to serve major firms, however small industry services and local manufacturers are unlikely to exhibit demand. Table 3-12 and Table 3-14 highlight a pressing need to identify additional industrial supply, particularly in locations which will complement Severnside and serve a wider range of market needs. Demand for industrial premises in the North Fringe is expected to be maintained, driven by new developments such as GKN's Global Technology Centre, and identification of additional supply will be required to support such growth. The key issue here will be how the aerospace and aviation industry respond post-COVID. If the sector begins to flourish again, there will be a likely need to reserve employment land in the area for grow-on space and development of the existing cluster of businesses.

As presented in the previous section, consented industrial accommodation remains low across the Unitary Authority, likely due to a lack of available space for feasible development. The pressures on industrial supply, particularly in locations such as the East Fringe, could be partially eased through intensification and efficient use of existing stock, as discussed in the Core Report. However, it will be crucial to consider the levels of demand in such locations, as market engagement recognised that locations such as Kingswood and Staple Hill could potentially no longer be suitable for modern industrial uses, due to increasing congestion and residential settings which restrict working hours and business operation.

Yate and the Surrounding Area has displayed strong demand historically for industrial uses, which is expected to be maintained for the foreseeable future, alongside potential diversification of employment provision. As the Core Report explores, this could involve the expansion of existing employment allocations to serve general industrial uses, depending on market demand, as well as intensification of current sites to maximise capacity. However, the residents of Yate are increasingly expressing distaste towards the number of logistics and industrial units within the town, predominantly due to congestion. This must be considered within future employment provision, with the appropriate consultation undertaken to balance employment need and resident wellbeing.

Storage and Distribution Supply

The sub-regional supply picture for storage and distribution space is dominated by the significant available land at Severnside Employment Area suitable for such activity, assessed to be approximately 140.5ha. In addition to these significant levels of available land, Severnside is consented for around 13ha, the vast majority of which sits within the storage and distribution use class. Severnside currently operates as a strategic distribution location for the West of England and beyond, and therefore should be considered in a national context. However, it is important to note that the majority of this supply at Severnside is predominantly suitable for regional/national distribution activity, involving purpose-built and large footprint warehouse facilities for major firms, and therefore cannot be regarded as an all-purpose storage and distribution location. Furthermore, as discussed with regards to industrial supply, Severnside is not likely to considerably reduce stresses on supply elsewhere in South

Gloucestershire. This is partly due to the inability of some businesses to relocate to Severnside due to operational requirements, in addition to the rapid take-up of existing supply and the constraints on future delivery.

There is a clear need to disaggregate floorspace supply between Severnside and the rest of South Gloucestershire. Indeed, building features and location criteria in Severnside aligns with large-scale regional distribution hubs, which do not represent a like for like alternative for demand employment space in the East Fringe and Yate for smaller logistics spaces and light industrial units. Away from Severnside, there is a relatively limited supply of storage and distribution land across South Gloucestershire, with the significant available land here concealing the shortfall and suggesting a possible overreliance on the area. Severnside currently accounts for approximately 90% of consents for storage and distribution uses, in addition to 98% of available land. South and East Rural has 3.1ha of available land at the section of Emersons Green that is located within the sub-zone.

In particular, both the North and East Fringe currently have no land available for storage and distribution uses, coupled with less than 1.5ha of consents. This includes a crucial lack of future supply for edge-of-centre premises which could serve the last mile logistics market. The evolving nature of the Transport and Logistics sector means there is now an increasing need for supply of such premises in key demand locations, for instance in the centre and on the edge of urban areas, complementing the well-established strategic distribution areas like Severnside. In the East Fringe, the extensive development of Emersons Green in recent years means available land for employment use without consents is currently limited.

Retail Supply

There is limited supply of readily identifiable retail space across South Gloucestershire, as shown by Table 3-12 and Table 3-10, with a total future supply of 5.8ha – including 2.91ha of consents and 2.89ha of available land. However, the 'retail' assessment presented in this report should be considered a high-level analysis of future retail supply with analysis limited by the study's core focus on employment uses. Market engagement did however reveal that retail supply is relatively limited in the typical town centre retail destinations within the Unitary Authority, including Yate, Kingswood and Hanham. The majority of consented supply identified during analysis is small-scale and situated within mixed-use developments across the sub-region.

Retail supply needs to be considered with regards to the impacts of COVID-19 and the increasing penetration of online retail, with a strong likelihood that store portfolios will be reduced in the long-term, coupled with increased retail vacancies where the offer is not appropriately aligned with the needs of the catchment. As a result, it is expected that significant recycling of retail space will occur, particularly in the urban centres across the Unitary Authority. In addition, it will be crucial for the aforementioned town centres of South Gloucestershire to be more flexible in how they can be repurposed for cultural offers, education and flexible employment, creating both destinations and employment opportunities of high-quality design and place-making, including public realm, green infrastructure as well as flexible working and digital connectivity.

COVID-19 has also increased demand for out-of-town shopping locations and retail parks, due to their spacious layouts and potential to ensure social distancing. This aligns with the availability on existing allocations in South Gloucestershire, with future retail supply predominantly dominated by 'Big Box' and out-of-town retail. This includes the Filton Northfield site and the potential for accommodation of large-scale premises at Severnside (such as car dealerships, wholesalers and other retail uses which can operate in out-of-town locations).

3.6. Overview of Future Supply

An overview of the quantitative supply picture across South Gloucestershire and its constituent sub-zones are shown below in Table 3-15 and Table 3-16, segmented by traditional Use Class or new Use Classes respectively. For these calculations of total future employment land supply, both consents (land with permission for commercial floorspace, detailed in Section 3.4) and available land on sites without permission (detailed in Section 3.5) have been included. The final sum tables incorporate data from Table 3-9 and Table 3-12 for the traditional Use Classes and Table 3-10 and Table 3-13 for the new Use Classes. The total future supply for South Gloucestershire is assessed to be 254.17ha – including 213.17ha in Severnside, 25.7ha in the North Fringe, 10.24ha in the East Fringe, 3.95ha in the South and East Rural area, 0.91ha in Yate and Surrounding Areas and 0.19ha in Thornbury and North Rural.

Consented supply comprises 17% of the overall future supply, covering 41.73ha. The remaining 83% of future supply comprises available land on existing sites without consent, equating to 212.44ha. The results of the supply analysis are compared with the anticipated demand range in the Core Report, in order to identify pressures in the supply-demand balance across South Gloucestershire and to establish the future spatial/locational needs which require prioritisation within the Unitary Authority. The Core Report presents a more detailed analysis of the supply-demand balance situation, including potential future allocations and a broad strategic direction for employment growth. In particular, the analysis focuses on meeting future employment land need in South

Gloucestershire, including maximising use of existing employment sites and identifying strategic locations with the potential to deliver desirable employment space.

Table 3-16 – Overview of Future Supply by Use Class (ha)

	Office (ha)	R&D (ha)	Industrial (ha)	Storage & Distribution (ha)	Retail (ha)	Other (ha)	Total
East Fringe							
Permissions	2.02	1.05	-1.40	0.92	1.53	1.97	6.09
Allocations	0	0	4.15	0	0	0	4.15
Sub-total	**2.02**	**1.05**	**2.75**	**0.92**	**1.53**	**1.97**	**10.24**
North Fringe							
Permissions	8.05	0.72	0.77	0.47	1.27	2.37	13.66
Existing Sites	3.6	3.39	3.36	0	1.69	0	12.04
Sub-total	**11.65**	**4.11**	**4.13**	**0.47**	**2.96**	**2.37**	**25.7**
Severnside							
Permissions	1.27	0	0.66	18.36	0.1	0.19	20.57
Existing Sites	0	13.4	25.8	140.5	1.2	11.7	192.6
Sub-total	**1.27**	**13.4**	**26.46**	**158.86**	**1.3**	**11.89**	**213.17**
South and East Rural							
Permissions	0.08	0.1	0.37	0.24	0	0.07	0.85
Existing Sites	0	0	0	3.1	0	0	3.1
Sub-total	**0.08**	**0.1**	**0.37**	**3.34**	**0**	**0.07**	**3.95**
Thornbury and North Rural							
Permissions	-0.03	0.02	0.07	0.06	0.03	0.05	0.19
Existing Sites	0	0	0	0	0	0	0
Sub-total	**-0.03**	**0.02**	**0.07**	**0.06**	**0.03**	**0.05**	**0.19**
Yate and Surrounding Area							
Permissions	-0.02	0	-0.02	0.45	-0.02	-0.03	0.36
Existing Sites	0	0	0.55	0	0	0	0.55
Sub-total	**-0.02**	**0**	**0.53**	**0.45**	**-0.02**	**-0.03**	**0.91**
South Gloucestershire							
Permissions	11.37	1.89	0.45	20.5	2.91	4.61	41.73
Existing Sites	3.6	16.79	33.86	143.6	2.89	11.7	212.44
Total	**14.97**	**18.68**	**34.31**	**164.1**	**5.8**	**16.31**	**254.17**

Appendix A. Site Proforma Example

A: BASELINE SITE INFORMATION

<table>
<tr><td colspan="4">A1. Baseline/Context – All baseline data to be provided by SGC either via AMR, GIS layers or other sources</td></tr>
<tr><td rowspan="4">A1.1 Site Typology</td><td>Existing</td><td></td><td rowspan="4">Tick relevant box
Note: Subject to the type of site being considered, not all fields in this proforma will be populated.</td></tr>
<tr><td>Committed (permitted)</td><td></td></tr>
<tr><td>Allocated (in Local Plan)</td><td></td></tr>
<tr><td>Proposed (submitted to HELAA)</td><td></td></tr>
<tr><td>A1.2 Site Name & Address (Inc Site reference, if applicable)</td><td colspan="3">CS12 table/SGC officer defined.</td></tr>
<tr><td>A1.2a Sub Area</td><td colspan="3">• North Fringe
• East Fringe
• Severnside
• Yate and Surrounding Area
• Thornbury and North Rural
• South and East Rural</td></tr>
<tr><td>A1.3 Location Plan / Geospatial reference</td><td colspan="3">Aerial photograph from GIS.</td></tr>
<tr><td>A1.4 Site area (ha)</td><td colspan="3">SGC defined from GIS.</td></tr>
<tr><td>A1.5 Site Context</td><td colspan="3">Brief description of the site and its current uses.</td></tr>
<tr><td>A1.6 Policy Status (existing/emerging)</td><td colspan="3">Options:
• None
• Existing safeguarded (CS12)
• Existing not safeguarded (CS12)
• Allocation
• Permission
• Proposed (e.g. via HELAA)</td></tr>
<tr><td>A1.7 Planning history</td><td colspan="3">Broad description of key planning history. If available and relevant to ELR: Existing application, extant permission, loss to Permitted Development Rights/other uses, Article 4 Directions.</td></tr>
<tr><td>A1.8 Location</td><td colspan="3">Brief description of location, relevant to surrounding uses and other key sites. Plus, state if: Brownfield/greenfield, within centre/urban area, edge of centre/urban area, out of centre/urban area.</td></tr>
</table>

<table>
<tr><td colspan="2">A2. Current Use (Existing employment and town centre sites only)</td></tr>
<tr><td>A2.1 Current role and sectors served by site</td><td>Description of broad range and mix of uses on site if known. Highlight evidence of key sectors being served and key employers on site.</td></tr>
</table>

A2.2 Amount of undeveloped land on site/within cluster (ha)	Source quantum from available data/GIS.
A2.2a Total number of units on site	Derived from NDBR / IDBR Data.
A2.2b Number of vacant units	Derived from NDBR / IDBR Data.
A2.2c Estimate of total number of jobs on site (where possible)	Derived from IDBR Data.
A2.3 Quality and fitness of purpose of existing site and premises (existing sites only)	Based on available evidence, factual commentary on current, productive use of site to assess general current market appeal, having regard to factors including: • Age and condition of stock • Evidence of significant vacancies • Suitability of buildings for modern occupiers • Environmental conditions • Parking provision if relevant
A2.3a Age and suitability of stock	Select one from the following: • Built 2000 onwards; quality as 'Grade A' specification to attract national/corporate occupiers; FRI or close to condition. Industrial - 6.5m plus eaves; Offices – open plan accommodation on single floor plates, air conditioning, • Mainly built 1990's onwards; modern specification may attract national occupiers; FRI or 75% condition. Industrial - 6m plus eaves; Office – mainly open plan accommodation, air-conditioning, • Mainly built 1980's onwards; adequate specification, more suitable to local businesses. Industrial - 5m to eaves upwards; Office - mainly open plan accommodation, air-conditioning, • Built before 1980; inadequate specification compared to modern units, suitable to local businesses. Industrial - 5m eaves or below; Office – cellular offices, • Built before 1980; inadequate specification suitable for refurbishment or redevelopment; only attract smaller, local businesses
A2.3b Evidence of significant vacancies	High-level suggestion from marketing information and monitoring reports.
A2.3c Suitability of buildings for modern occupiers	Select one from the following: • Highly regarded; very good market appeal; attracts and achieves prime values. • Well regarded; good market appeal; attracts close to prime values. • Displays market appeal; day to day churn; attracts secondary value • Occupier resistance; limited market appeal; longer void rates; command below secondary value. • Virtually no market appeal; occupiers highly reluctant; longest void periods; tertiary values.
A2.3d Onsite facilities	Select one from the following: • Very good loading and parking facilities; excellent car parking ratio • Good parking and loading facilities; good car parking ratio. • Adequate parking and loading facilities; adequate car parking ratio • Poor loading and parking; minimal parking and basic fit out. • No loading and parking provision.

<table>
<tr><th colspan="2">A3. Description of qualitative features of site (sourced from available data, GIS & other secondary sources)</th></tr>
<tr><td>A3.1 Strategic connectivity</td><td>Factors to consider include location and ease of access relative to:
• Strategic Road Network
• Rail Freight Network
• Passenger Rail Network
• Port, airport, other strategic transport or multi-modal hub

For B2/B8-
• Adjoining major trunk road or motorway junction, easy access for all vehicles, access to rail station, metrobus and other key bus routes airport or seaport
• Close to major road network, easy access for all vehicles
• Reasonable site access for all vehicles, indirect or restricted access to major road network
• Restricted access for HGVs, restricted access to major road networks
• Restricted access for all commercial vehicles, severely limited access to major road networks

For all other uses including: offices, creative, digital and high-tech industries, etc:
• Within 800 metres of a public transport interchange
• Within 1.2 km of Town Centre
• Outside urban area

Provide descriptive commentary on relevant characteristics.</td></tr>
<tr><td>A3.2 Local accessibility and opportunities to reduce carbon through travel

Indicator compiled by the following:</td><td>Factors to consider include ease of access to:
• Local public transport network
• Local highway and urban road network

Provide descriptive commentary on relevant characteristics.</td></tr>
<tr><td>A3.2a Reducing carbon from travel to work (Walking / Cycling)</td><td>Does the site have pedestrian access and is it within 100M of a strategic cycle route?</td></tr>
<tr><td>A3.2b Reducing carbon from travel to work (Public Transport)</td><td>Is the site within 400m of a bus stop or 800m from a Metro Bus stop or railway station?</td></tr>
<tr><td>A3.3 Accessibility to town centres/local amenities</td><td>Describe location and position of site in terms of access to town centres and local services and amenities. If not relevant, set out reasons why.

Is site is within 1.2km of a Town Centre / Retail?</td></tr>
</table>

A3.4 Digital Connectivity	Think Broadband UK Broadband Coverage and Speed Test Result
A3.5 Compatibility with neighbouring uses/character of wider area	Using available data and geospatial / mapping information, provide commentary on general compatibility of site (if used for employment generating purposes) with surrounding land-uses: • Well established commercial area; compatibility and uniformity of uses. • Established commercial area; mainly compatible and uniformity of uses. • Mixed commercial area with residential nearby; mainly compatible uses. • Mainly residential with few commercial uses; incompatible uses. • Mainly residential with very few commercial uses; nonconforming uses.
A3.6 Strength of functional and/or spatial linkages	Describe if there is an identifiable spatial linkage between the site and: • Strategic employment and business / industrial clusters. • Port, airport or other gateway / transport hub. • City or town centres. • Universities or innovation clusters • Nearby sites with complementary functions
A3.7 Access to Local Workforce	Broad balance of ‘jobs’ to ‘resident workers’ within the area: More resident workers than jobs (job to worker ratio <0.5) Broad balance between resident workers to jobs (job to worker ratio 0.5-1.5) Fewer resident workers than jobs (job to worker ratio >1.5) Source (pg. 3): https://www.southglos.gov.uk//documents/SGlos-Commuter-flows-note-inc.-Appendices.pdf

B: QUALITATIVE ASSESSMENT – SITE SUITABILITY

B1. Site Potential and Opportunities – Application of market sector frameworks						
B1.1 Suitability of site/cluster for key market sectors	Identify suitable sectors with existing or potential suitability on site. Provide brief rationale for sector selection.					
B1.2 Strength of existing or potential suitability and rationale						
	Fully, readily and viably meets market / sector needs	Committed infrastructure or other planned investment will enable market / sector needs to be met	Potentially meets sector / market needs if uncommitted infrastructure or constraints are overcome	Only partial potential to meet needs and/or marginal viability being likely	Does not meet sector / market needs and/or demonstrates notable market failure (unviable)	

	Rationale/justification - Provide narrative / commentary including identification of suitable sectors. Distinguish between existing and potential suitability.			
B1.3 Scale of Opportunity	High-level identification of opportunities/potential land area for development or regeneration/intensification/expansion.			
B1.4 Requirement for infrastructure investment to enable suitability potential to be realised.	Specify key infrastructure requirements to enable development potential to take place.			
Short-term Recovery (COVID-19)				
B1.5 Significant opportunity to provide short term job generation or supply chain support to drive short-term recovery from COVID-19 pandemic	Likely to provide significant jobs or supply chain support within the next year Scores to reflect scale of job opportunities		Not Likely to provide jobs or supply chain support within the next year Scores to reflect scale of job opportunities	
Inclusive Growth				
B1.6 Potential to provide significant job and/or skills opportunities for priority socio-economic groups and/or areas of high deprivation.	High to good degree of proximity to areas of high deprivation and scale / type of employment likely to be generated	Reasonable proximity to high deprivation and/or provision of suitable jobs	Very low to low degree of proximity to areas of high deprivation and poor suitability of employment likely to be generated	
B1.6a Within 2km of designated Priority Neighbourhood	Is the site within 2km of a designated Priority Neighbourhood?			
Clean Growth				
B1.8 Potential to meet demand for new/emerging green industries	Commentary on potential suitability of site to accommodate clean growth industries. Specify and provide rationale.			
B1.9 Potential to contribute to zero/low carbon growth?	High level commentary on potential role (if any) site could play in contributing to zero / low carbon growth. Specify and identify investment requirements if known.			
Regeneration (existing sites only)				
B1.10 Potential for (in-situ) expansion of businesses/ intensification/	Strong to good market demand with solid viability prospects for	Reasonable market demand with viability	Very low to low market demand and/or likely viability constraints for	

repurposing /redevelopment to meet sectoral demand	repurposing / redevelopment to key sector use.	prospects good subject to site or wider infrastructure investment.	repurposing / redevelopment to key sector use.	
	Rationale/justification - Provide narrative			
Cross-sectoral spatial needs *(if not yet captured above)*				
B1.11 Can provide space for social enterprise	Provide commentary on potential and associated rationale / evidence. Identify key functions and opportunities where relevant.			
B1.12 Capable of providing flexible/co-working space / and/or facilitate remote working				
B1.13 Capable of providing incubator/ accelerator/start-up hub space.				
Delivery				
B1.14 Ownership	Known ownership constraints that may prevent the site/cluster from effectively being delivered.			
B1.15 Physical and/or environmental constraints	Physical/environmental constraints that may prevent the site/cluster from effectively being delivered – flood risk, contaminated land, infrastructure costs, environmental or heritage protection designations.			
	No significant or relatively minor constraints that will not undermine development feasibility, viability or deliverability.	Some constraints that can be addressed or mitigated through achievable infrastructure investment or other measures. Costs of doing so may reduce but not significantly diminish development viability or deliverability	Major or prohibitive constraints that will undermine development feasibility, viability or deliverability. Environmental constraints sufficiently important to prevent development for employments.	
B1.15 Likely Delivery Timeframe	Years 1-5 years, 6 -10 years, 11-20 years			

C1 Regional Conclusion and Recommendations	
C1.1 Conclusion: To what extent does the site/cluster offer strong strategic potential to contribute to employment growth and key sector prioritisation across South Gloucestershire?	**RAG Summary** Strong Reasonable Low

C1.2 Justification/rationale – Provide summary narrative from all sections. Rationale for recommendations.
C1.3 Recommendation – • Identify recommended policy interventions for further testing through the plan-making process (Allocate/retain and protect in whole or part), consider uses/key market sectors. • Consider potential for repurposing/change of use in part or as a whole. • Identify mitigations for development option, recognising where infrastructure gaps or constraints exist

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