BATH AND NORTH EAST SOMERSET

PLANNING, HOUSING AND ECONOMIC DEVELOPMENT POLICY DEVELOPMENT AND SCRUTINY PANEL

Tuesday, 3rd July, 2018

Present:- Councillors Will Sandry (Chair), Barry Macrae (Vice-Chair), Rob Appleyard, Colin Blackburn, Lisa O'Brien, David Veale and Liz Richardson

Also in attendance: John Wilkinson (Director of Economy and Growth), Richard Daone (Planning Policy Team Leader) and Rob Dawson (Business Engagement Officer)

1 WELCOME AND INTRODUCTIONS

The Chairman welcomed everyone to the meeting.

2 EMERGENCY EVACUATION PROCEDURE

The Chairman drew attention to the emergency evacuation procedure.

3 APOLOGIES FOR ABSENCE AND SUBSTITUTIONS

There were none.

4 DECLARATIONS OF INTEREST

There were none.

5 TO ANNOUNCE ANY URGENT BUSINESS AGREED BY THE CHAIRMAN

There was none.

6 ITEMS FROM THE PUBLIC OR COUNCILLORS - TO RECEIVE DEPUTATIONS, STATEMENTS, PETITIONS OR QUESTIONS RELATING TO THE BUSINESS OF THIS MEETING

There were none.

7 MINUTES - 8TH MAY 2018

The Panel confirmed the minutes of the previous meeting as a true record and they were duly signed by the Chairman.

8 FUTURE OF RETAILING IN DISTRICT CENTRES

The Director for Economy & Growth introduced this item to the Panel. He said that he welcomed the opportunity to discuss the issue and acknowledged that this comes at a time of national headlines reporting the closure of many large retail businesses.

He informed the Panel that this could be due to a number of factors, including;

- Use of technology / online purchases
- Higher costs to businesses – Minimum wage, Rates etc.
- Less cash in the economy
- Change in the tastes of the public
- Chains opening too many outlets

He explained that the Panel would receive three presentations (Matthew Morris (GVA), Alison Herbert (BID) and Rob Dawson (Council's Business Growth Team) and discuss how the local area can be supported.

<u>Matthew Morris, GVA – Retail and Town Centre Trends</u>

A summary of his presentation is set out below.

<u>Retail Spending</u>

Growth (per annum %)	1997-2007	2008-2011	2012-2016	2017-2026
Retail	5.4%	-0.3%	2.3%	1.8%
Convenience goods	0.0	-3.1	-0.2	0.0
Comparison goods	8.3	0.7	3.9	2.8

Councillor Lisa O'Brien commented that shoppers were now not simply looking to make pure retail visits they are looking for a leisure experience. She added that since a number of coffee shops have opened in Keynsham that footfall has increased.

Matthew Morris agreed that over the past ten years that food and drink outlets have been the saviour of high streets.

Sales by location

Malls	2014 size £22.9bn	2019 size 29.7bn	Growth (2014-19) 29.6%
Local / Other	2014 size £54.5bn	2019 size 59.6bn	Growth (2014-19) 9.5%
Retail Parks	2014 size 94.7bn	2019 size 97.8bn	Growth (2014-19) 3.3%
High Streets	2014 size 107.2bn	2019 size 108.0bn	Growth (2014-19) 0.7%

Traditional retailing v non-store retailing

Since 2012 growth in retailing has increased between 2 – 4.2%, in comparison growth in non-store retailing which has increased between 9 – 16.4%. A forecast for future years shows a similar trend.

Grocery retail sector – Market shares

Between 2012 – 2017 there has been a degree of change to shopping at one of 'big four' supermarkets with Aldi (+2.5%) and Lidl (+1.3%) seeing an increase in custom.

2018 – A tough year on the high street

Jamie's Italian – 12 restaurants close
Toys R us – closure of UK business
New Look – up to 60 stores to close
Carpetright – 92 of its 409 stores to close
Marks & Spencer – 100 stores to close by 2022
Carphone Warehouse – 92 shops to close
Mothercare – 50 stores to close
Poundworld – closure of all stores
House of Fraser – 31 of 59 stores to close

Retail Trends Influencing Planning Applications

- Re-purposing of out of centre space and vacancies created by store closures – see M&S, Lower Bristol Road, Bath example
- Move from large high end out of centre retail park proposals to more modest value orientated proposals
- Aggressive 'asset management' of retail parks
- Slower pace of re-purposing town centre space in the face of change / decline

How can the public sector respond to these changes / trends?

- More flexible in terms of changes of use
- Independent sector
- Public sector control / ownership
- The rise in 'people services' and 'experience'
- Local interest groups

Land Uses and Policy Approach

- Trend towards service-based uses in district and local centres
- Focus upon 'people services'
- Differentiated planning policy approach for local and district centres
- Less emphasis on retaining a large amount of Class A1 shops
- Broader mix of main town centre uses
- Research shows that successful centres don't just rely on retailing
- Greater public sector involvement in delivery of Local Plan allocations

Public Sector Control / Ownership

- Market failure in town centres
- Local authorities purchasing existing retail / town centre floorspace
- Gloucester City Council: Kings Quarter & Kings Walk
- Stroud: Merrywalks Shopping Centre
- Development companies in Cornwall and Torbay
- Different emphasis to purely private sector ownership

Locally-Led Groups

- Business Improvement Districts / local traders associations
- Not just city / town centres, but also district and local centres
- Events to draw visitors to local / district centres

Councillor Barry Macrae asked if some businesses had noticeably moved into district centres from the city centre.

Matthew Morris replied that this was true to a certain degree due to the cost of rents.

The Chairman asked for clarification of the use class orders for shops / retail outlets.

The Team Manager for Planning Policy stated that they were as follows:

- A1 – Retail
- A2 – Services
- A3 – Cafes / Restaurants
- A4 – Drinking Establishments
- A5 – Take Aways

The Chairman asked how Local Plan now differs with regard to change of use.

The Team Manager for Planning Policy replied that in 2007 a decision was taken to not permit a change of use from A1. He added that the Placemaking Plan has looked at work to be more flexible about these arrangements whilst still protecting shops to a certain extent.

He said that as work continues on the new Local Plan he expects this element to be looked at again.

Councillor Lisa O'Brien commented that she was pleased to hear that some landlords in Keynsham were taking a more friendly approach to rent agreements at least at the outset of a new business.

Matthew Morris replied that he was aware that the option of a rent whereby the tenants pay the landlord a % of their turnover were starting to take shape.

Councillor Liz Richardson asked if the classes (A1, A2 etc) have the same level of business rates.

Matthew Morris replied that individual rates would be applied per shop.

Councillor Liz Richardson asked his view on showroom concept stores.

Matthew Morris replied that these stores were few and far between, but are seen as a destination or experience to gain footfall to the area they are situated in.

Councillor Barry Macrae commented that 30 years ago Bath provided more of a unique offer, but he felt that it was now the same shops everywhere. He asked if it was possible to overcome the brand names remaining in clusters.

Matthew Morris replied that as we live in a capitalist free market it was not. He added though that Bath was second on the list for the number of small retailers it has in a comparison with similar sized cities.

The Chairman thanked Matthew Morris for his attendance on behalf of the Panel.

Alison Herbert, Bath BID (Business Improvement District) -

A summary of her presentation is set out below.

What we do

The BID works with 710 premises within the middle of the city, well over half of these are independent.

Clean – Provide additional street clean functions to that of the Council
Safe – Fund the Taxi Marshall scheme
Prosperous – Give business support and guidance to our members
Welcome – Support events within the city centre and help to maintain its floral displays

Smart – Gather data on behalf of our members to identify shopping trends and how visitors and residents navigate around the city.

<u>Current local trends, footfall and sales</u>

Bath BID pays for 5 cameras in the city centre which count footfall. We are in the process of getting a further one and in addition, Southgate shopping centre shares information with us. In addition we have monthly sales data provided anonymously by 20 businesses.

Monthly Footfall

Benchmark calculations (Year on Year and Month on Month) have been calculated using like for like data sets (only those counters available in both comparison periods) to ensure statistical accuracy

	Year to Date % Change		Year on Year % Change		Month on Month % Change	
	2018	2017	2018	2017	2018	2017
Bath City Centre	▲ 0.4 %		▲ 3.6 %		▲ 0.7 %	▲ 0.8 %
Southgate, Bath	▼ -2.8 %	▲ 3.0 %	▼ -3.6 %	▲ 5.1 %	▼ 0.0 %	▲ 3.1 %
South West	▼ -3.1 %	▼ -1.3 %	▼ -1.3 %	▼ -2.7 %	▲ 3.8 %	▼ -5.3 %
UK	▼ -3.4 %	▼ -0.1 %	▲ 0.5 %	▼ -2.0 %	▲ 4.5 %	▼ -1.0 %

Burton Street, 18.8 %
Union Street, 18.3 %
St Lawrence St North, 14.1 %
Southgate Street South, 12.7 %
Southgate Street North, 10.6 %
Sawclose, 8.5 %
Northgate Street, 6.5 %
St Lawrence St South, 6.2 %
Milsom Street, 4.3 %

Councillor Rob Appleyard asked if the BID covered the area of Walcot Street.

Alison Herbert replied that it does.

Councillor Barry Macrae commented that it would be interesting to see the spread of footfall between residents and tourists.

Alison Herbert replied that the BID were working with a number of agencies, including the Council, Police, Bath Rugby, Mastercard and O2 to gather more detailed info on movements and trends around the city.

<u>Future High Street 2030</u>

The Housing, Communities and Local Government (HCLG) Committee launches inquiry looking at the future of England's high streets and town centres in 2030.

"Our high streets and town centres have an important social, civic and cultural place in our society. But, many of our high streets are now struggling, facing a range of challenges including the threat posed by online retailers. Indeed, changing trends and behaviours in recent decades – driven by a range of economic, demographic, social and technological factors – have affected the prosperity and vibrancy of our high streets."

What can we do looking forward?

Collaborate on events together and make them better
Take more care of our retail and high street businesses
Public realm and amenities
Ensure that unhelpful street activity is regulated (traders)
Work together to tackle antisocial behaviour and homelessness
Curate the retail offer as landlords

Councillor Lisa O'Brien said that she felt the current use of the community space within Southgate was a great idea and asked if the shops in close proximity had seen an increase in footfall.

Alison Herbert replied that she did not have the information to hand. She added that the BID was not responsible for this work as Southgate was privately owned land.

Councillor Colin Blackburn said that he found it interesting that some businesses that had begun online were now making their way into having a physical presence on the high street. He said that he felt the idea of concept stores was worth pursuing.

Alison Herbert replied that the BID would also like to see businesses take a different approach where possible to increase trade. She spoke of how shoemakers Loakes will sometimes go out onto the streets and offer a shoe polish service. She said that she was aware that John Lewis had held events with live sewers providing alterations to curtains and that House of Fraser in Bath has recently developed a small space in store to curate events.

The Chairman asked if the BID would consider expanding into other areas of the Council, including Keynsham and Midsomer Norton.

Alison Herbert replied that she saw no reason in principle why they couldn't, but said that the members of the BID would need to be consulted on their boundary.

Councillor Liz Richardson asked if the BID work with landlords when shops become empty.

Alison Herbert said that they are able to dress them on behalf of landlords. She added that they were seeking to hold an open day with agents to gain interest in empty premises and were having discussions with the Council on difficult to rent sites.

Councillor Barry Macrae said that he hoped for the BID to become more proactive through this process as he felt they have a unique contribution to make to many aspects within the city.

The Chairman thanked Alison Herbert for her attendance on behalf of the Panel.

Rob Dawson, Business Engagement Officer

A summary of his presentation is set out below.

The Business Growth Team and our Role

The Business Growth Team consists of 4 staff who sit within Economic Growth at the Council and are tasked with delivering the business theme of the Council's Economic Strategy Review. Under that theme there are three priorities: business growth & investment, new business space and business support.

The Economic Strategy Review also identifies retail as one of Bath & North East Somerset's "core sectors", indicating its importance in terms of current employment (over 10,000 jobs).

Our team therefore has a strategic objective to support local retailers and help protect this valuable sector. We also recognise the added role the retailers play in making a place desirable to live and work; a village shop can help bind a rural community whilst the shopping offer of Bath city centre helps make it an attractive location proposition for offices.

Our role is to engage with and support local businesses and provide one point of contact should they have issues with or need to access any additional Council services.

Recent activity assisting retailers

Strategic and Collaborative

We have helped Cllr Paul Myers create a Retail Reference Group for Bath & North East Somerset. The Retail Reference Group consists of independent retailers from various retail districts in Bath & North East Somerset, who meet with the Business Growth Team and Cllr Paul Myers to provide feedback on trading conditions and any issues they are currently faced with. This new Group is helping inform the production of a new Retail Action Plan, other future policy direction and business support initiatives.

A representative from the Business Growth Team also attends the Bath Independents Group and other retail forums to listen to retailer's concerns, understand current and future trends and promote the ways in which retailers can get help.

We have also supported the creation of the new Keynsham Business Forum, which is sector agnostic but has been heavily attended by shopkeepers to date.

Direct Retail Engagement and Support

We conducted a survey on the economic impact of the Keynsham High Street one way trial on local businesses and over 100 responses from businesses in or around Keynsham High Street were received.

The survey findings will help shape the future of the high street's transport infrastructure. Beyond the survey, many retailers wanted to talk about other issues affecting their business, requiring a business support referral or help accessing other services offered by the Council. We now have an ongoing relationship with many traders as a result of this work.

Our team carried out employment monitoring checks for the Bath Enterprise Zone in March, which provided another opportunity to engage with retailers in the Guildhall and Green Park Station retail areas of Bath. Once again we used the face-to-face opportunity to promote business support opportunities and assisted retailers with various issues such as finding a new property and employment law.

We have also commenced dialogue with a number of traders on Moorland Road as one action coming from the Retail Reference Group. I have conducted individual business visits and follow-up assists with some retailers and introduced myself to over a dozen more. We hope to have a traders meeting in the summer.

I also meet business on their premises following receiving an initial enquiry. Whilst this service is more labour-intensive than other communication methods we find that traders are more tied to their premises and less likely to access online support services in comparison to other sectors. Putting a face to a name, visiting and understanding their business and then responding to any questions has been valued by the shopkeepers.

The team has engaged and/or assisted over 240 retailers so far in 2018

Business Support Available

Enterprising West of England is our flagship business support project for Bath & North East Somerset and represents our main investment in business support. The project which commenced in 2017 and ends at the end of 2019 is led by Business West and match-funded by the EU, meaning the Council is receiving double its investment for business support.

The programme covers the West of England and includes help for pre-starts and existing businesses that have less than 250 employees.

Grants are also available towards the cost of coaching businesses towards growth

Cool Ventures – Businesses can receive up to 12 hours of free business support, which is delivered by local consultants Cool Ventures following a procurement process. This compares with 3 hours of free support on our previous programme.

Cool Ventures have a number of specialists they can refer businesses on to, including support services that are experienced in working with retailers. A face to face meeting would take place first to understand the business and the challenges they are currently faced, followed by planned programme of support to help businesses grow.

Direct Interventions

These are within the bounds of our work area in the Business Growth Team, so do not include public realm, planning and fiscal interventions.

Specialised retailer training to improve shopper experience, increase footfall and boost sales. These initiatives could include mystery shopping and window dressing training, and could be wrapped around a campaign or competition to increase awareness.

Funded digital skills training for retailers to establish and/or improve their web mobile and social media presence. Online sales have irrevocably changed UK retailing yet in 2017 still accounted for less than a fifth of retail trade nationally; this is only going to grow. According to Google there has been a 300% increase in searches for "opening hours" in the past two years. In short, shopkeepers need to have a clear and easily searchable online presence or risk losing trade to those who do.

Expanding the Council's engagement of retailers to ensure all of our retail zones have access to the same services and support

Indirect interventions

Work with retailers and partners at the Bath BID, Visit Bath to establish shopper profiles for the retail districts in BANES. Determine how the retail district is marketed as a whole, and how this can be improved to bringing about more first time visits, more return visits and longer dwell time.

Following on from the previous intervention, work collaboratively with partners to encourage suitable events, experiences and leisure opportunities to attract and retain customers to retail districts

Councillor Barry Macrae said that he was pleased to hear that the team will offer to carry out work in local areas.

Councillor Colin Blackburn asked what the response has been from retailers regarding training and support.

The Business Engagement Officer replied that it has been broadly positive in the main. He added that within the team they have been highlighting the offer of support from Cool Ventures.

Councillor Colin Blackburn asked what the increase in search for ‘opening hours’ tells us.

The Business Engagement Officer replied that it shows that customers are becoming more curious and the need for businesses to have a good website or business Facebook page

The Chairman thanked Rob Dawson on behalf of the Panel.

Councillor Paul Myers, Cabinet Member for Economic and Community Regeneration said that he believed there was a real role for the Council in providing support to our local businesses.

Councillor Liz Richardson commented that she felt that the Panel should have a role in the development of the Local Plan, especially with regard to possible change of class use of retail sites.

Councillor Lisa O’Brien asked if the Council in its landlord role charged market rate rents.

The Director for Economy & Growth replied that it does.

Councillor Lisa O’Brien asked how many unoccupied sites were within the city.

The Director for Economy & Growth replied that of the 450 commercial properties, 19 were vacant and 9 of those were currently under offer.

Councillor Lisa O’Brien asked if Council helps in terms of shop facia when a site becomes empty.

The Director for Economy & Growth replied that the Council does use some vacant sites to advertise events, but that generally sites become occupied soon after becoming available.

Councillor Rob Appleyard said that he was pleased to hear that the speed of turnover once a property becomes vacant is good. He asked whether the area was over supplied with retail offers.

The Director for Economy & Growth replied that we are obviously seeing that a number of large retailers have overstretched themselves. He added that the Council was looking at what it can do in terms of flexible leases, especially for small businesses.

Councillor Paul Myers said that B&NES should celebrate its retail success especially that of its vast amount of independent traders.

The Chairman asked if the Panel can support a proposal to expand the BID.

Councillor Myers replied that in these current times retailers were unlikely to want to incur extra costs. He added that discussions are carried out with the local Chambers of Commerce. He suggested the Panel revisit this discussion in a few months' time to see how it has developed.

The Director for Economy & Growth added that an opportunity to discuss the boundary of the BID could take place in 2020.

The Chairman thanked everyone for their part in a very interesting debate and said he looked forward to any future work carried out by the Panel.

9 CABINET MEMBER UPDATE

Councillor Bob Goodman, Cabinet Member for Development and Neighbourhoods addressed the Panel, a summary of his update is set out below.

<u>Joint Spatial Plan</u> – The Council are hoping to hear this week when the examination in public will take place.

<u>Local Plan</u> – Options continue to be assessed alongside LDF discussions.

<u>Housing</u> – 1,250 houses have been completed as of the end of April 2018. Infrastructure work continues to support these developments.

Waterspace Project: Finalist for Living Waterways awards, announcement due in September. Community Workboat now operating with Canal and Rivers Trust, community activities programme (including litter picks) underway.

<u>Bathscape Project</u> – The project was awarded a development grant from HLF in November 2016 and submitted a Round 2 application in June 2018 to fund delivery between 2018 and 2023. A grant announcement is expected in September.

Councillor Rob Appleyard asked if there were any revenue concerns with this work in comparison to the cutting of grass areas / verges.

Councillor Goodman replied that there were no revenue concerns.

Councillor Liz Richardson commented that the West of England Joint Spatial Plan as submitted by the West England Partnership had been commended at the Royal Town Planning Institute's (RTPI) Awards for Excellence in Plan Making Practice 2018.

Councillor Goodman acknowledged this and said the award was well deserved.

Councillor Colin Blackburn asked if a breakdown of the housing numbers quoted could be given to the Panel.

Councillor Goodman replied that they were due to released next week and that he would ask for the Panel to be notified.

Councillor Appleyard asked if the development of the former MoD sites have had an impact on these figures.

Councillor Goodman replied that they have alongside those at BWR.

Councillor Barry Macrae said that he remained concerned over the provision of Local Needs Housing and whether the right types of houses were being built for residents.

Councillor Goodman replied that this would be addressed under the Local Plan.

The Chairman asked if he had any concerns regarding the availability of migrant workers following the decision to leave the EU.

Councillor Goodman replied that he felt that a labour / skills shortage already exists and that this would be likely to continue following the decision.

Councillor Paul Myers, Cabinet Member for Economic and Community Regeneration addressed the Panel, a summary of his update is set out below.

Bath Enterprise Zone

- Bath Quays North – Ongoing discussions with the LPA in relation to the Outline Planning Application for comprehensive redevelopment of Avon St coach and carpark. Application to be debated at August 2018 Development Management Committee.

- Bath Quays South – Strong market response received during soft marketing phases for Council delivered commercial office. Commercial Estate Investment SMD paper approved.

    - Enabling works commenced on-site. Trees and vegetation removed and archaeology concluding with no significant finds.
    - Legal discussions progressing with TCN: lease anticipated September, surveying work ongoing to the building.

- Bath Quays Bridge – Tenders returned for works associated with BQS sub-structure and river wall delivery, and steel tonnage order relating to super-structure fabrication.

    - BQS contractor engaged to deliver Phase 2b work package – foundations to bridge substructure and river wall.
    - Preferred superstructure contractor appointed.

Housing

- Ministry of Housing Communities & Local Government (MHCLG) Rough Sleeper Bid – The bid for additional funding targeting rough sleeping levels in Bath & North East Somerset was successful and resulted in an initial allocation of £350,500 for the current financial year. Negotiations are ongoing around the level of allocation for 2019/20 and will be based on a shift towards prevention of future rough sleeping. Partners are working together and with Housing Services to refine the original proposals in line with this new approach, which will be submitted to MHCLG on 29 June for consideration during July.

- Bath City “Additional HMO Licensing” Consultation Feedback: High level of support – 910 responses to the consultation survey were received with further qualitative feedback gathered from two public meetings, stakeholder interviews and written responses over a consultation period of 10 weeks.

  Overall support for the proposal is very strong with 85% in support. The responses will be considered and inform the final proposal and decision on the scheme.

- Rural Housing Week – National Rural Housing week runs from 2-6 July and we will be marking this promotion event with the formal opening of 5 affordable homes at Tynings Meadow, Bathampton. These 5 homes have been delivered by Liverty (formerly Knightstone HA) and local developer Charlcombe Homes, as part of a larger development of market homes, and have been supported by £169,000 subsidy from the Council’s affordable housing capital budget to address a funding gap.

Economy & Culture

- The Business Growth Team contributed to the development of a WECA bid to the Government’s £50m Urban Connected Communities Fund, in order to create a 5G communication network along the Bristol and Bath corridor. If successful the fund will support a nationally significant 5G testbed in the City, which will enable business and social care sector to develop and test new wireless technology applications. Promoting advancements in health care and business growth in the area.

Heritage Services

- Roman Baths **-** New museum trails to link to the ‘Minerva Owls’ city-wide project.

- Victoria Art Gallery – ‘Creativity Works’ – new community workshops with a young mums group and a Genesis Trust group as part of the HLF-funded project accompanying the purchase of the ceramic urn *Posh Art* by Turner Prize-winning artist Grayson Perry.

- Fashion Museum – A series of bespoke embroidery classes in partnership with the Royal School of Needlework, based on original historical dress on display in the museum galleries; one class saw participants recreate the gold work motif on Queen Alexandra’s coronation glove. All classes sold out!

Strategic Housing and Regeneration

Strategic Housing Sites (North Keynsham and Whitchurch)
- Landowner discussions ongoing;

- B&NES co-ordinating Housing Infrastructure bid funded by WECA and in partnership with Bristol CC; submission deadline March 2019; and
- Planning Policy and Regeneration working together to produce a deliverable and aspirational New Local Plan including transport options assessments, Design Review Panel and comprehensive evidence base (largely funded by WECA and MHCLG).

Somer Valley Enterprise Zone

- Governance in place including Key Stakeholder Group meeting today (3 July 2018);
- Jones Lang LaSalle Commercial Delivery Plan in progress, planning strategy to be discussed at Local Development Framework Steering Group 9 July 2018; and
- Transport feasibility underway to improve A362 including EZ site access and safer routes to school. LEP outline business case submission in the Autumn.

Market Towns

- MSN High Street Core: Landowners and Regeneration working together to influence vision for the area;
- Town Park masterplan (led by Town Council) nearing conclusion;
- Keynsham High Street: Consultation has demonstrated majority public support although business concerns being carefully looked at, B&NES funding approval required to enable submission of LEP Full Business Case for £1.5m in January 2019; and
- Radstock Healthy Living Centre: NHS funding confirmation expected imminently. Upon confirmation detailed design will commence.

Public Realm

- Saw Close: Completed 3 months early and £300k under budget. Safety and design issues with the private Deeley Freed space are in discussion. Lessons learned report underway;
- York Street/Swallow Street: City Centre Coordination Group has been established, chaired by Regeneration, to co-ordinate York Street repairs, Archway, Abbey Footprint and public realm schemes;
- Kingsmead: Study underway in partnership with local businesses to determine traffic and parking feasibility.

Broadband

- Specific detail will be added to the recently submitted briefing paper and circulated again to the Panel.

Councillor Lisa O'Brien asked for timings regarding the Radstock Healthy Living Centre.

The Director for Economy & Growth replied that it was dependant on receipt of funding from the NHS and that the facility would be a new build, so a broad timescale would be 2 – 3 years.

The Chairman repeated his earlier question regarding the availability of migrant workers following the decision to leave the EU.

The Director for Economy & Growth replied that discussions were ongoing with WECA and the LEP on this matter.

10 PANEL WORKPLAN

Councillor Lisa O'Brien asked if there was any local legislation the Council could look to introduce relating to Short Term Rentals.

The Chairman said that he was aware that three separate motions on this matter were due to be presented at Council next week.

Councillor Liz Richardson suggested the Panel conduct a small amount of research to find out if any limits had been set around the country.

Councillor Colin Blackburn commented that all elements of the Panel's remit are affected by this issue and that they should seek to be proactive.

The meeting ended at 5.25 pm

Chair(person) ....

Date Confirmed and Signed ....

Prepared by Democratic Services

Retail and Town Centre Trends

A Presentation to Bath & North East Somerset Council's Scrutiny Panel

Presented by:
Matthew Morris

Agenda

- Introductions
- Recent and on-going trends in the retail sector
- How Councils, through their planning and other functions, can respond to these trends

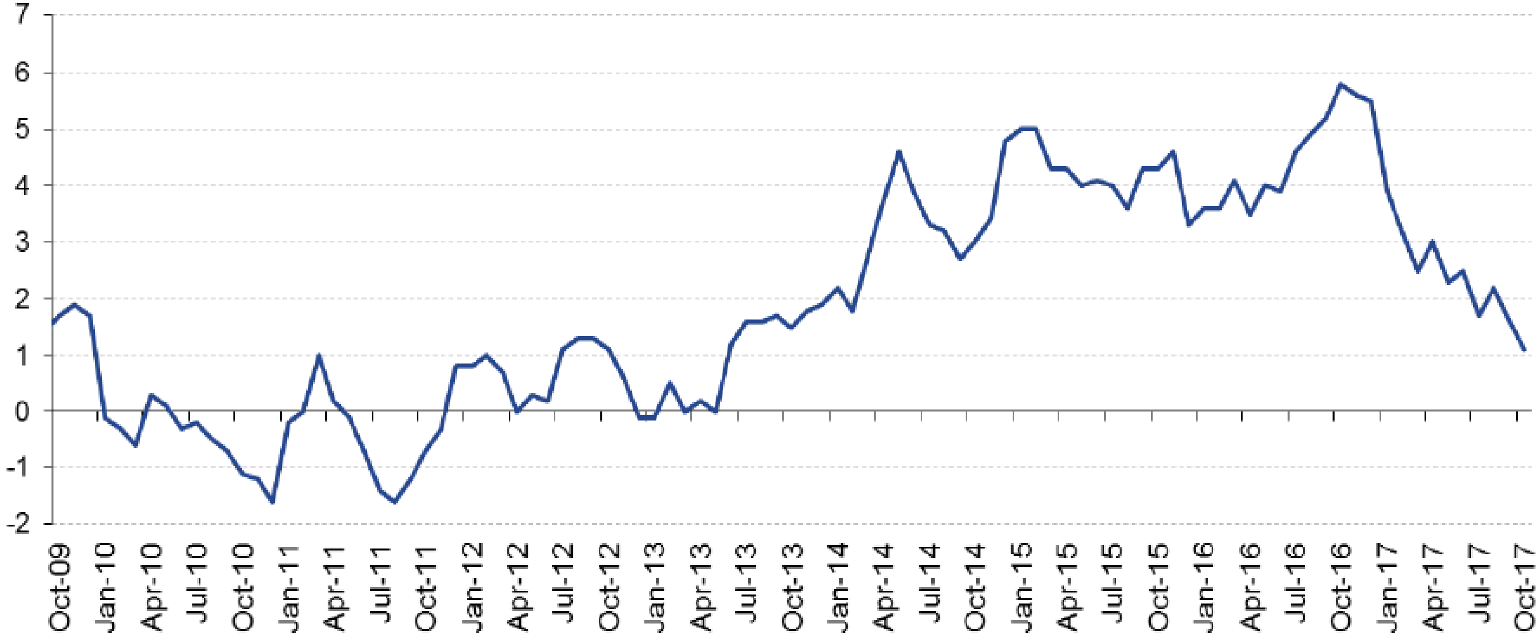
Recent and On-Going Trends in the Retail Sector

Retail Spending

Growth (per annum %)	1997-2007	2008-2011	2012-2016	2017-2026	2027-2036
Retail	5.4%	-0.3%	2.3%	1.8%	2.4%
Convenience goods	0.0	-3.1	-0.2	0.0	0.1
Comparison goods	8.3	0.7	3.9	2.8	3.2

Retail Volume Growth 2009-2017

Chart 2: Total retail volume growth (% change in the last 3 months to same period of previous year)



Sources: Experian, National Statistics, CBI, Gfk NOP

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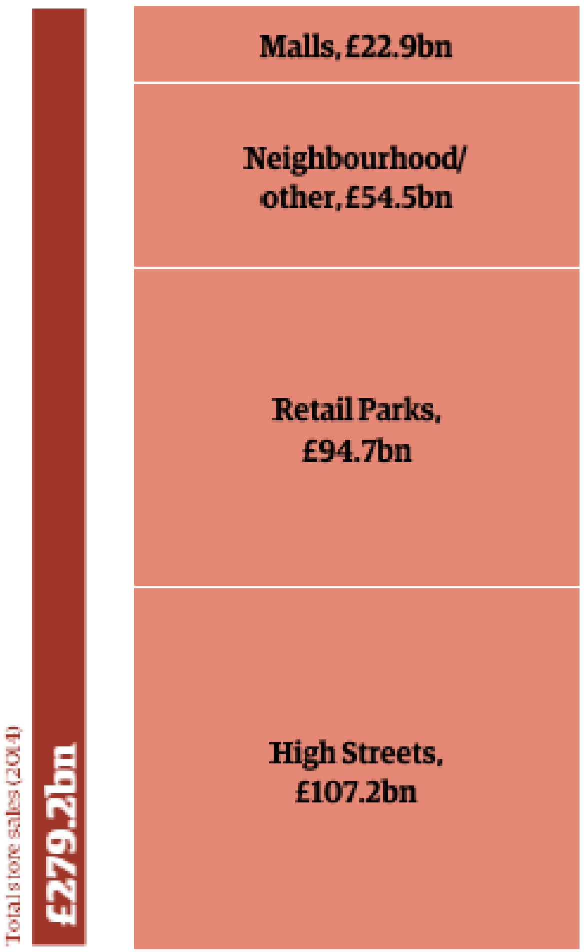
GVA

Sales by location



	2014 size	2019 size	Growth (2014-19)
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Neighbourhood /other	£54.5bn	£59.6bn	9.5%
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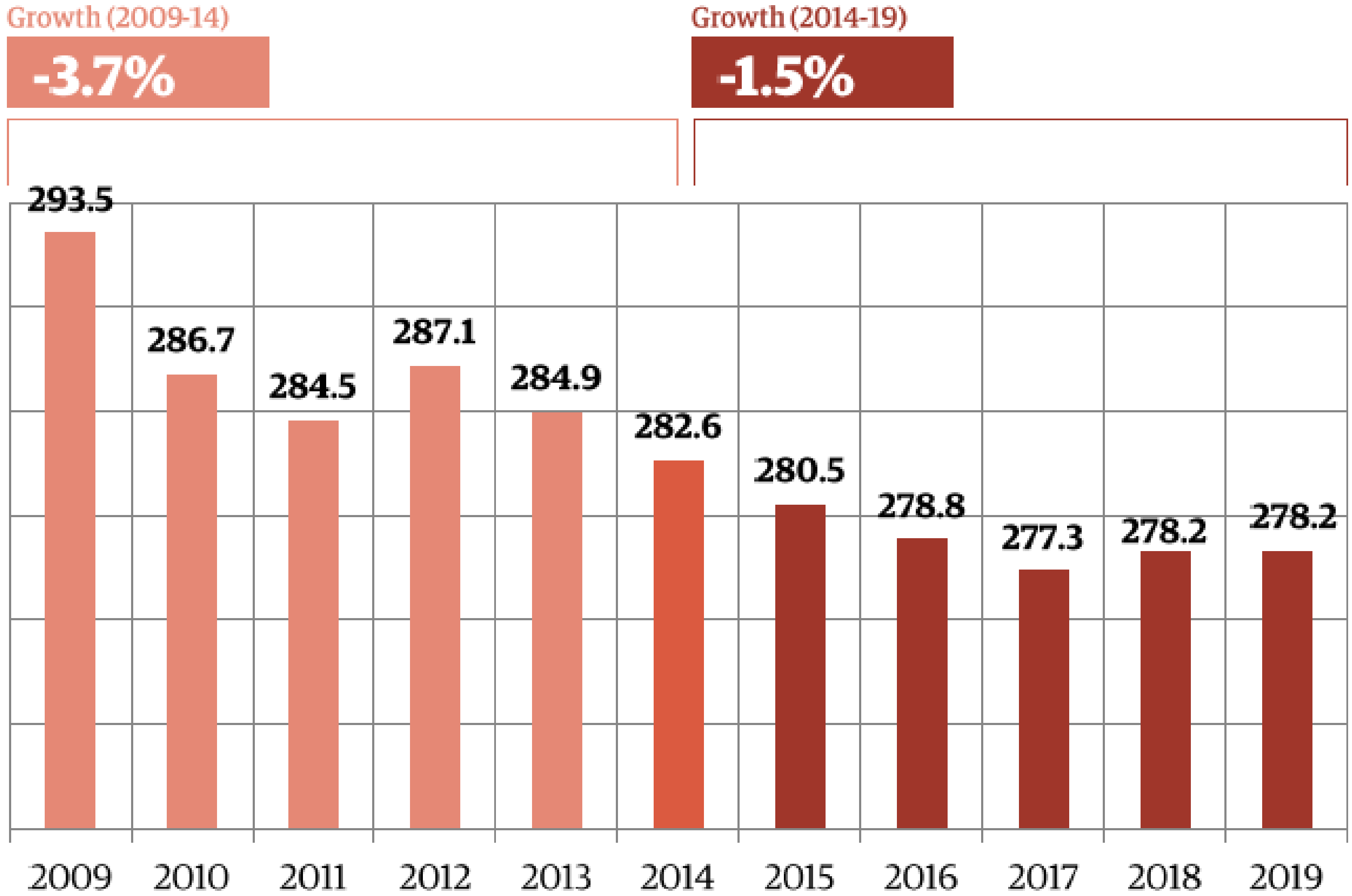
High Streets	£107.2bn	£108.0bn	0.7%

GVA

Store Numbers 2009-2019



GVA

Growth in Retail Spending – traditional retailing v non-store retailing

Volumes at 2013 prices	All retailing* £bn	Non-store £bn	Growth in retailing %	Growth in non-store %
2006	314.8	17.1	5.2	14.2
2007	327.6	18.7	4.1	9.4
2008	336.8	21.9	2.8	17.1
2009	329.6	25.8	-2.1	17.8
2010	334.8	29.2	1.6	13.0
2011	333.9	33.4	-0.3	14.4
2012	340.5	36.4	2.0	9.0
2013	349.4	41.5	2.6	14.2
2014	359.3	45.5	2.8	9.6
2015	372.0	49.5	3.5	8.8
2016	387.8	57.6	4.2	16.4
forecast				
2017	396.2	65.3	2.2	13.2
2018	400.3	69.0	1.0	5.7
2019	407.9	73.2	1.9	6.1
2020	418.7	77.9	2.6	6.5
2021	430.6	82.9	2.8	6.4
2022	442.9	87.9	2.9	6.0
2023	455.4	92.1	2.8	4.7
2024	468.2	96.0	2.8	4.3
2025	481.0	99.7	2.7	3.8
2026	494.4	103.6	2.8	3.9
2027	508.0	107.4	2.8	3.6
2028	521.9	111.2	2.7	3.6

The grocery retail sector – market shares

	2012	2013	2014	2015	2016	2017	Change
Tesco	23.9	23.2	22.6	22.3	22.2	22.2	-1.7
Sainsburys	13.1	12.9	12.6	12.3	12.2	12,1	-1.0
ASDA	13.3	13.0	13.0	12.1	11.5	11.4	-1.9
Morrisons	9.3	8.9	8.3	8.3	8.2	8.2	-1.1
ALDI	2.6	3.3	4.2	4.6	4.9	5.1	+2.5
Lidl	2.3	2.5	2.9	3.3	3.5	3.6	+1.3
Co-op	5.4	5.1	4.9	4.8	4.8	4.8	-0.6
M&S	3.7	3.7	3.8	3.9	4.0	4.1	+0.4
Waitrose	3.6	3.7	3.9	3.8	3.9	3.9	+0.3

2018 – a tough year on the high street

- Jamie's Italian – 12 restaurants close
- Bryon Burgers – 20 restaurants close
- East – closure of 50 shops
- Toys R us – closure of UK business
- New Look – up to 60 stores to close
- Prezzo – 94 of 300 outlets to close
- Carpetright – 92 of its 409 stores to close
- Marks & Spencer – 100 stores to close by 2022
- Carphone Warehouse – 92 shops to close
- Carluccio's – closure of 34 restaurants
- Mothercare – 50 stores to close
- Poundworld – closure of all stores
- House of Fraser – 31 of 59 stores to close

Retail Trends Influencing Planning Applications

- Re-purposing of out of centre space and vacancies created by store closures – see M&S, Lower Bristol Road, Bath example

- Move from large high end out of centre retail park proposals to more modest value orientated proposals

- Aggressive 'asset management' of retail parks

- Slower pace of re-purposing town centre space in the face of change / decline

GVA

How the public sector can respond

How can the public sector respond to these changes / trends?

- More flexible in terms of changes of use
- Independent sector
- Public sector control / ownership
- The rise in ‘people services’ and ‘experience’
- Local interest groups

Land Uses and Policy Approach

- Trend towards service-based uses in district and local centres
- Focus upon ‘people services’
- Differentiated planning policy approach for local and district centres
- Less emphasis on retaining a large amount of Class A1 shops
- Broader mix of main town centre uses
- Research shows that successful centres don’t just rely on retailing
- Greater public sector involvement in delivery of Local Plan allocations

GVA

Public Sector Control / Ownership

- Market failure in town centres
- Local authorities purchasing existing retail / town centre floorspace
- Gloucester City Council: Kings Quarter & Kings Walk
- Stroud: Merrywalks Shopping Centre
- Development companies in Cornwall and Torbay
- Different emphasis to purely private sector ownership.

Locally-Led Groups

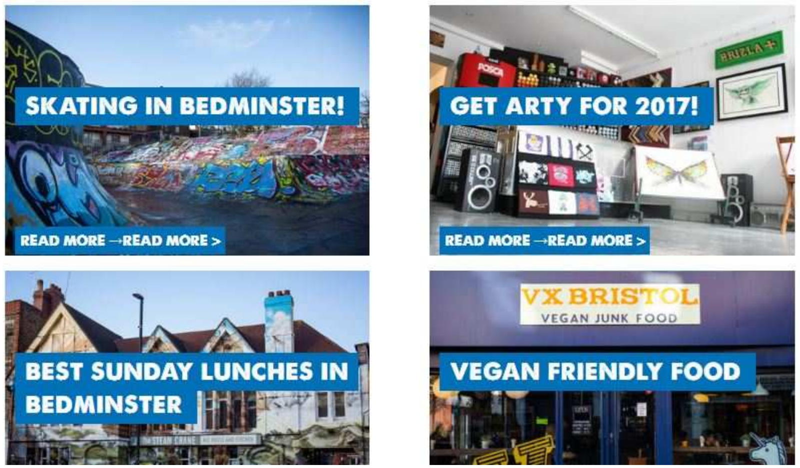
- Business Improvement Districts / local traders associations
- Not just city / town centres, but also district and local centres
- Events to draw visitors to local / district centres

WHAT NEXT FOR BEDMINSTER'S SHOPPING STREETS?

DISCOVER COMMUNITY NEWS BUSINESS

ACTION GREATER BEDMINSTER

ALL | EVENTS | SHOPPING | ENTERTAINMENT | FOOD & DRINK



Thank you

Presented by

Matthew Morris
Director

GVA

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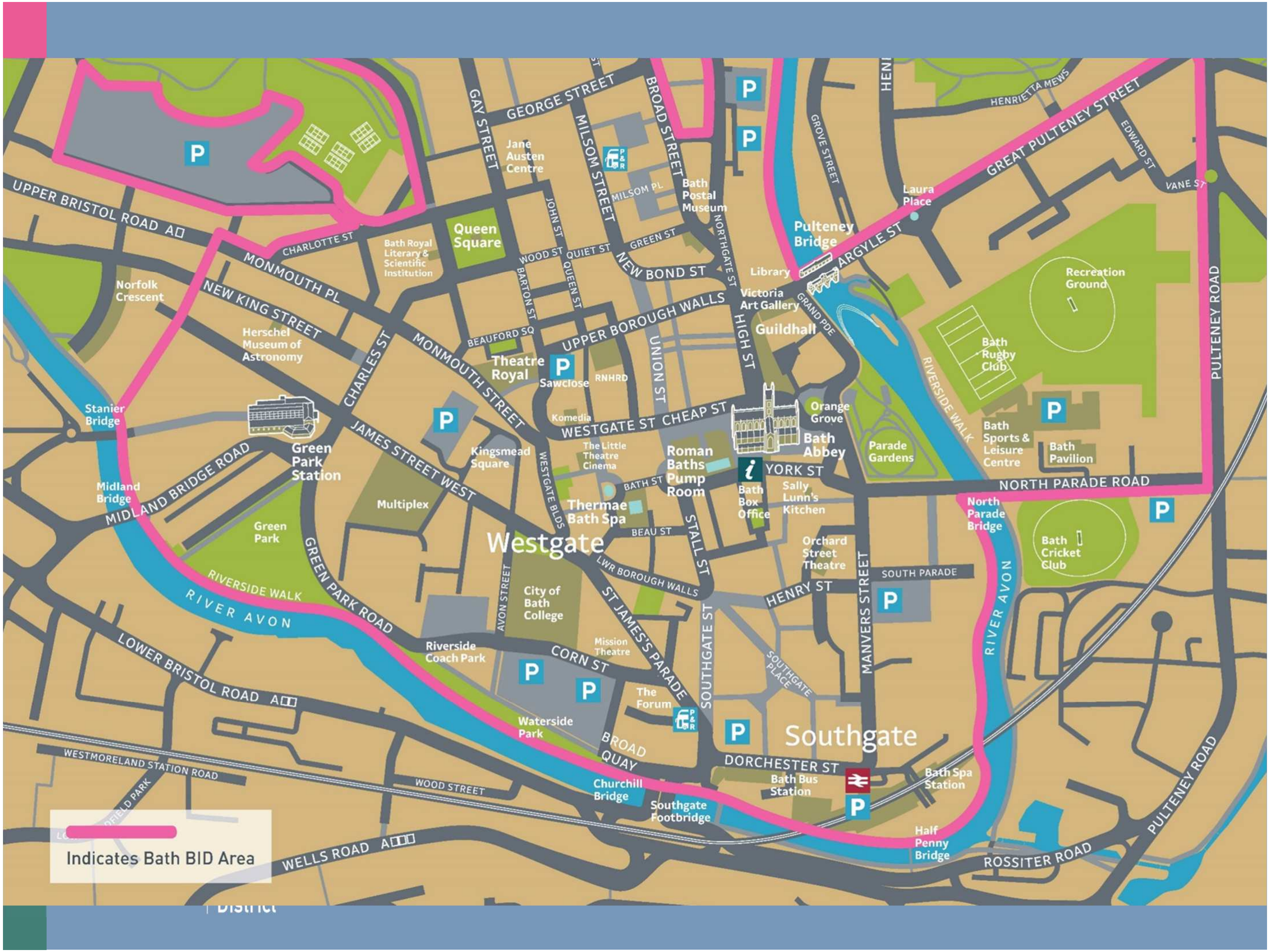
Bath BID company and our work

Allison Herbert

BATH Business Improvement District



GEORGE STREET
GAY STREET
MILSOM STREET
BROAD STREET
Jane Austen Centre
MILSOM PL
Bath Postal Museum
UPPER BRISTOL ROAD A4
CHARLOTTE ST
Queen Square
Bath Royal Literary & Scientific Institution
JOHN ST
WOOD ST
QUIET ST
GREEN ST
NORTHGATE ST
NEW BOND ST
Library
Pulteney Bridge
ARGYLE ST
Laura Place
GROVE STREET
GREAT PULTENEY STREET
HENRIETTA MEWS
EDWARD ST
VANE ST
PULTENEY ROAD
Recreation Ground
Bath Rugby Club
Norfolk Crescent
MONMOUTH PL
NEW KING STREET
BARTON ST
QUEEN ST
UPPER BOROUGH WALLS
Victoria Art Gallery
GRAND PDE
Guildhall
HIGH ST
UNION ST
Herschel Museum of Astronomy
BEAUFORD SQ
Theatre Royal
Sawclose
RNHRD
CHARLES ST
MONMOUTH STREET
RIVERSIDE WALK
Stanier Bridge
Green Park Station
Komedia
WESTGATE ST
CHEAP ST
Orange Grove
Bath Abbey
Parade Gardens
Bath Sports & Leisure Centre
Bath Pavilion
JAMES STREET WEST
Kingsmead Square
The Little Theatre Cinema
Roman Baths
Pump Room
YORK ST
Midland Bridge
MIDLAND BRIDGE ROAD
Multiplex
WESTGATE BLDS
BATH ST
Thermae Bath Spa
Bath Box Office
Sally Lunn's Kitchen
NORTH PARADE ROAD
North Parade Bridge
Green Park
Westgate
BEAU ST
STALL ST
Orchard Street Theatre
Bath Cricket Club
LWR BOROUGH WALLS
SOUTH PARADE
RIVERSIDE WALK
RIVER AVON
AVON STREET
City of Bath College
GREEN PARK ROAD
ST JAMES'S PARADE
SOUTHGATE ST
HENRY ST
MANVERS STREET
LOWER BRISTOL ROAD A36
Riverside Coach Park
CORN ST
Mission Theatre
SOUTHGATE PLACE
The Forum
Waterside Park
BROAD QUAY
Southgate
DORCHESTER ST
Bath Bus Station
Bath Spa Station
WESTMORELAND STATION ROAD
WOOD STREET
Churchill Bridge
Southgate Footbridge
Half Penny Bridge
ROSSITER ROAD
WELLS ROAD
Indicates Bath BID Area

What we do

Clean

Safe

Smart

Prosperous

Welcome

BATH Business Improvement District

Current local trends footfall and sales

BATH Business Improvement District

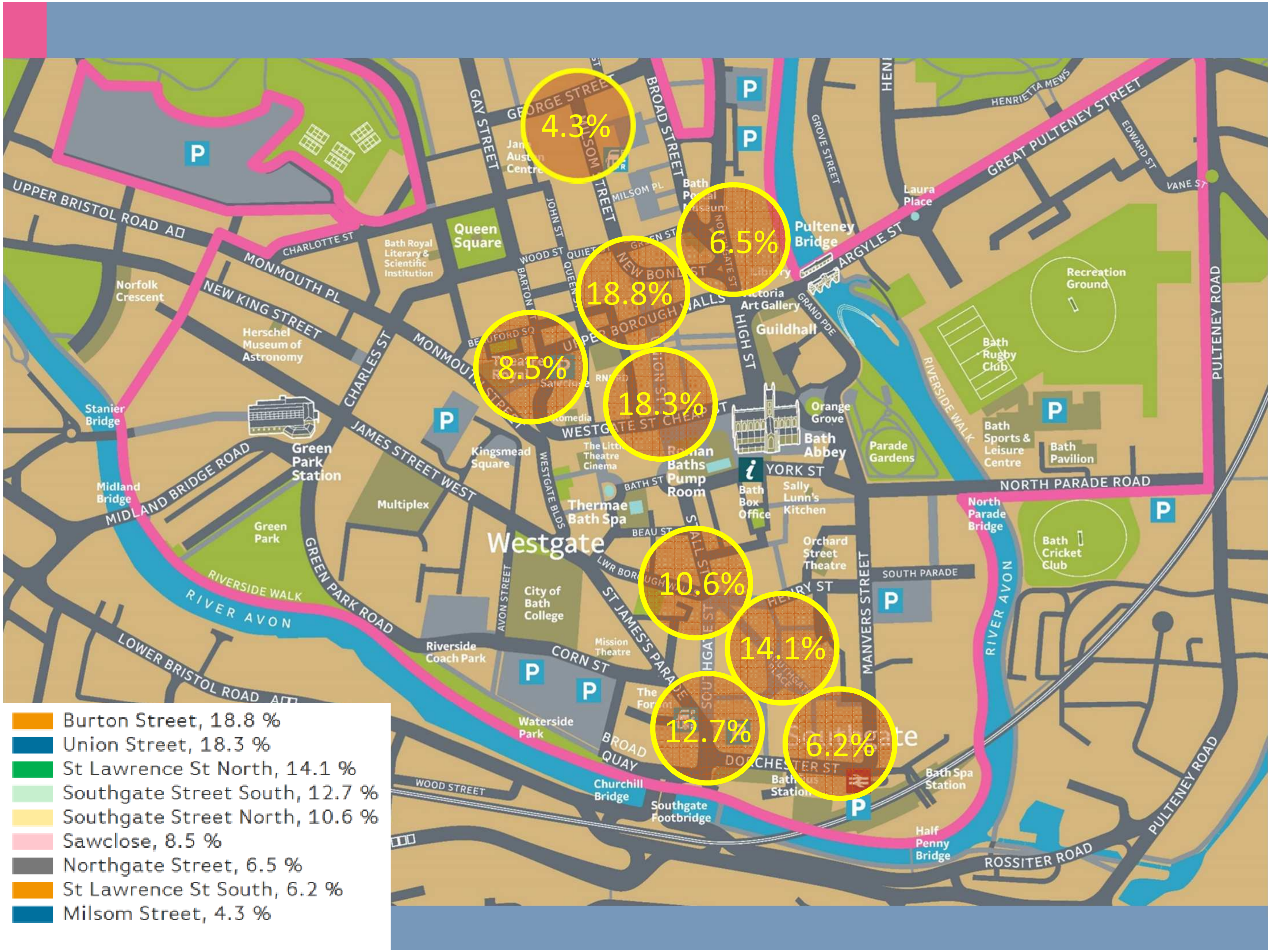
Bath City Centre Benchmark
May 2018

Monthly Footfall

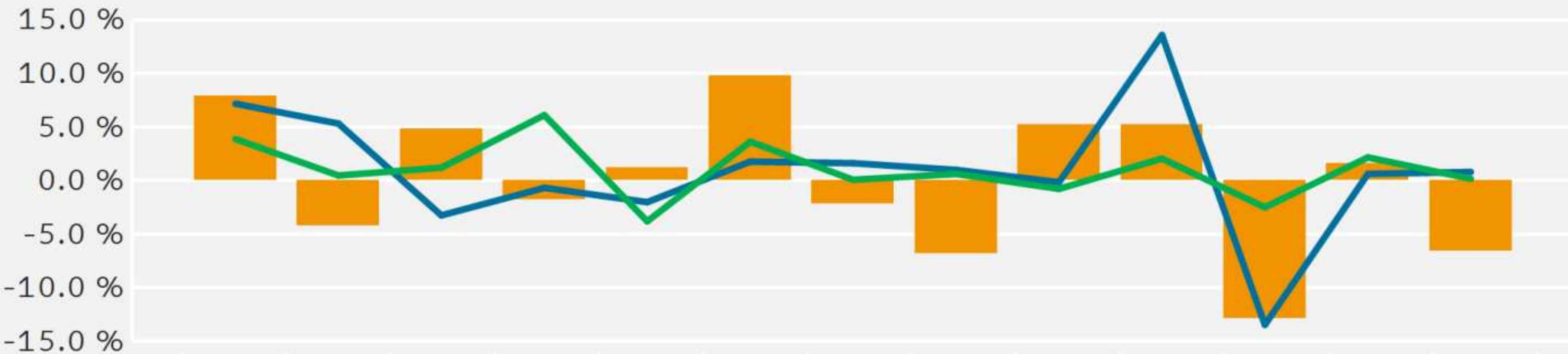
Benchmark calculations (Year on Year and Month on Month) have been calculated using like for like data sets (only those counters available in both comparison periods) to ensure statistical accuracy

	Year to Date % Change		Year on Year % Change		Month on Month % Change	
	2018	2017	2018	2017	2018	2017
Bath City Centre	▲ 0.4 %		▲ 3.6 %		▲ 0.7 %	▲ 0.8 %
Southgate, Bath	▼ -2.8 %	▲ 3.0 %	▼ -3.6 %	▲ 5.1 %	▼ 0.0 %	▲ 3.1 %
South West	▼ -3.1 %	▼ -1.3 %	▼ -1.3 %	▼ -2.7 %	▲ 3.8 %	▼ -5.3 %
UK	▼ -3.4 %	▼ -0.1 %	▲ 0.5 %	▼ -2.0 %	▲ 4.5 %	▼ -1.0 %

BATH Business Improvement District


4.3%
6.5%
18.8%
8.5%
18.3%
10.6%
14.1%
12.7%
6.2%
Westgate
Southgate
Burton Street, 18.8 %
Union Street, 18.3 %
St Lawrence St North, 14.1 %
Southgate Street South, 12.7 %
Southgate Street North, 10.6 %
Sawclose, 8.5 %
Northgate Street, 6.5 %
St Lawrence St South, 6.2 %
Milsom Street, 4.3 %

Bath City Centre Sales performance data
May 2018
Weekly percentage changes(rolling 13 week)



Week Commencing	25/03	01/04	08/04	15/04	22/04	29/04	06/05	13/05	20/05	27/05	03/06	10/06	17/06
Centre Sales	7.9 %	-4.3 %	4.8 %	-1.8 %	1.2 %	9.7 %	-2.2 %	-6.9 %	5.2 %	5.2 %	-12.9 %	1.6 %	-6.6 %
Centre Footfall	7.2 %	5.3 %	-3.3 %	-0.7 %	-2.0 %	1.8 %	1.6 %	1.0 %	-0.2 %	13.6 %	-13.5 %	0.6 %	0.8 %
UK Footfall	3.9 %	0.5 %	1.2 %	6.1 %	-3.8 %	3.6 %	0.1 %	0.6 %	-0.8 %	2.0 %	-2.5 %	2.2 %	0.2 %

BATH Business Improvement District

Future High Street 2030

BID submission via the BID Foundation, the ATCM and the Institute of Place Management

"Our high streets and town centres have an important social, civic and cultural place in our society. But, many of our high streets are now struggling, facing a range of challenges including the threat posed by online retailers. Indeed, changing trends and behaviours in recent decades – driven by a range of economic, demographic, social and technological factors – have affected the prosperity and vibrancy of our high streets.

BATH Business Improvement District

Local opportunities to effect positive change

BATH Business Improvement District

The 25 factors which influence the vitality and viability of retail centres Prof Cathy Parker IPM 2016

activity/hours
appearance
retailers
vision
experience
management
merchandise
necessities (amenities – car parking, toilets, seating)
anchors
networks with the council
diversity
walking
entertainment
attractiveness
place assurance (service)
accessible
marketing
comparison vs convenience
recreational space
uncommodified spaces
barriers to entry
chain vs independent
crime and safety
liveable
adaptable
store development

BATH Business Improvement District

Bath & North East
Somerset Council

Support for Retailers in Bath & North East Somerset

Business Growth Team

Bath and North East Somerset – *The* place to live, work and visit

Bath & North East Somerset Council

Agenda

The Business Growth Team and our role
Recent activity assisting retailers
Business support available
Suggested interventions
Questions

Bath & North East Somerset Council

The Business Growth Team and our role

Bath and North East Somerset – *The* place to live, work and visit

Bath & North East
Somerset Council

The Business Growth Team and our role

CORE SECTORS

- Tourism, Leisure, Arts & Culture
- Retail
- Health & Wellbeing
- Finance & Professional Business Services

KEY SECTORS

- Creative & Digital
- Information & Communication (ICT)
- Advanced Engineering & Electronics
- Environmental & Low Carbon

Bath and North East Somerset – *The* place to live, work and visit

Recent activity assisting retailers

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Bath & North East Somerset Council

Recent activity assisting retailers

City retailers asked for their input into Local Plan

Date Published: Tue, 22/05/2018

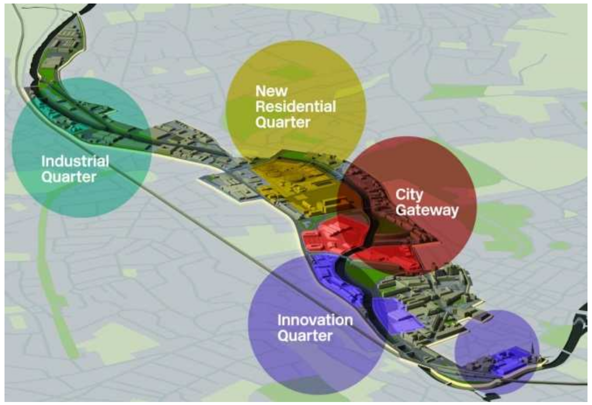
Bath & North East Somerset Council is gathering evidence to support the preparation of its Local Plan, and city retailers are being asked for their input.

Local Plans are the key documents through which local planning authorities can set out a vision and framework for the future development of the area. With a forthcoming Local Plan consultation period set for summer 2018, work is underway to understand retail supply and demand in Bath & North East Somerset both now and for the future.

One area of interest is the need to understand the city's independent traders and their customers, as well as the associated economic impacts on Bath. A short survey has been prepared to help inform the research and policy development process and the Council is keen for city-based independent retailers to respond.

Please see link to the survey: https://www.surveymonkey.co.uk/r/ZHNR7MZ

The deadline for responding to the survey is noon Thursday 31 May 2018.



Bath and North East Somerset – *The* place to live, work and visit

Bath & North East Somerset Council

Business support available

www.businesswest.co.uk/ewoe

Bath and North East Somerset – *The* place to live, work and visit

Business support available

coolventures
inspiring entrepreneurs

- Up to 12 hours of free specialist advice
- Tailored to the needs of the business
- Pre-start or existing businesses

Bath & North East Somerset Council

Business support available

Bath & North East Somerset Council

Suggested Interventions

- Specialised retailer training
- Boosting web, social and mobile presence
- Expanding Council retailer engagement

Bath and North East Somerset – *The* place to live, work and visit

Bath & North East
Somerset Council

Suggested Interventions

- Profiling and marketing retail districts as a whole
- Using events, experiences and leisure to support retail

Bath and North East Somerset – *The* place to live, work and visit

Bath & North East Somerset Council

Questions

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Business Growth Team
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