



Shops and Services around the Temple Quarter Enterprise Campus



(Image source: University of Bristol)

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Appendix A: Findings from mapping of retail and other services

1. Background

This report presents findings from community research to investigate opportunities for the provision of shops and services at the Temple Quarter Enterprise Campus (TQEC). The report builds on public consultation carried out by Avril Baker in 2017, and a community workshop co-hosted by Up Our Street and the University of Bristol's Temple Quarter Engagement team on Wednesday 21 February 2018. Findings from these consultations suggested that there is appetite for the provision of public facing amenities at the campus, but concern not to replicate or compete with existing provision in the local area. This research further investigates the levels of local provision and demand for key services, and the views of local residents, stakeholders and businesses on the proposed University of Bristol development.

Up Our Street is a community organisation which has been working with residents in the Easton and Lawrence Hill wards of Bristol on neighbourhood management, communications and community development projects since 2000. It was formed through the merging of the resident boards of the New Deal for Communities programme in Barton Hill and the Easton Neighbourhood Renewal Partnership in 2010, and continues to work directly with local people to effect change.

1.2 Methodology

Three data collection methods have been utilised to feed in to this report. The first was the mapping of relevant services in a defined area of proximity to the proposed campus. The originally defined area was expanded to include relevant local high streets.



The proposed study area. (Map source: Google)

Key services across the area have been mapped including banks, supermarkets, leisure centres, GP surgeries, and nurseries. Other key sites including hubs and community centres have also been included on the map. In commercial centres a more comprehensive mapping has been undertaken. The areas mapped are Wells Road, Lawrence Hill, Church Road, St Marks Road, Stapleton Road and Temple Quay. Visits to these sites were undertaken in May 2018. The data is presented digitally in a layered google map.

The second set of data came from a targeted survey of community venues. The survey sought to establish the current offer of community spaces across the area, and was sent to venues for completion in April

2018. A total of 13 responses from key community spaces were collected. For the third component of the research, 22 semi-structured interviews were conducted in May 2018 with residents, business owners and service providers.

Like all research methods there are some limitations to be aware of. Interview participants were selected with the objective of collecting a broad spectrum of experience and attitudes. The sample is however fairly small, so data is presented through analysis of key themes, rather than as a representative sample of local opinion. Not all venues we approached chose to participate in the community venues survey, so there are some gaps in the detail of local provision. The mapping exercise offers a 'snapshot' of high streets on the date the visits were completed. The data may be affected by the information available at the time of the visit (not all business hours are the same), and change of businesses in the meantime (businesses opening, changing hands or closing since the visit).

2. Mapping

Data collected through the mapping exercise is presented through an interactive Google map, which can be viewed using this link:

https://drive.google.com/open?id=12bUltGpSTIFYZzPmDcBCCSDhGznX8ah9&usp=s_haring

Key findings from the mapping exercise are listed below. A more comprehensive report on the findings by area is attached as appendix A.

2.1 Key findings

- The mapping exercise in general found healthy and vibrant commercial centres in close proximity to the Temple Quarter campus site.
- Provision of retail and retail services is strong, but with obvious gaps in grocery, fresh food and supermarket provision in Old Market and Temple Quarter areas.
- There are two GP surgeries in close proximity to the site, an uneven spread of community venues, and lack of community services including banks.
- There is a broad range in the offer of eateries across the area, although some high streets are dominated by fast food takeaways, and there is a lack of evening economy in Temple Quay.



Snippet of online map (Map source: Google)

3. Community venues survey

Up Our Street approached community venues to complete an online survey in order to establish a clear picture of space available for events, meetings and community activities in the research area. Venues offering public facing provision of space hire were approached, which excluded some schools, faith centres and services that reserve space for use associated with their main function. Of the 17 venues identified for participation, 11 completed the survey, one partially completed the survey and five did not complete the survey. Basic data on provision has been gathered on those that did not complete the survey where this is publicly available.

Completed survey	Partially completed survey	Did not complete survey
Baggator / The Pickle Factory Barton Hill Settlement Bethesda Methodist Church City Academy Bristol Easton Community Centre Engine Shed Felix Road Adventure Playground Hannah More School Paintworks Event Space Trinity Community Arts Wellspring Healthy Living Centre	Grant Thornton	All Hallows Hall Easton Business Centre Passenger Shed Phoenix Social Enterprise St Luke's Church Hall

3.1 Map of venues

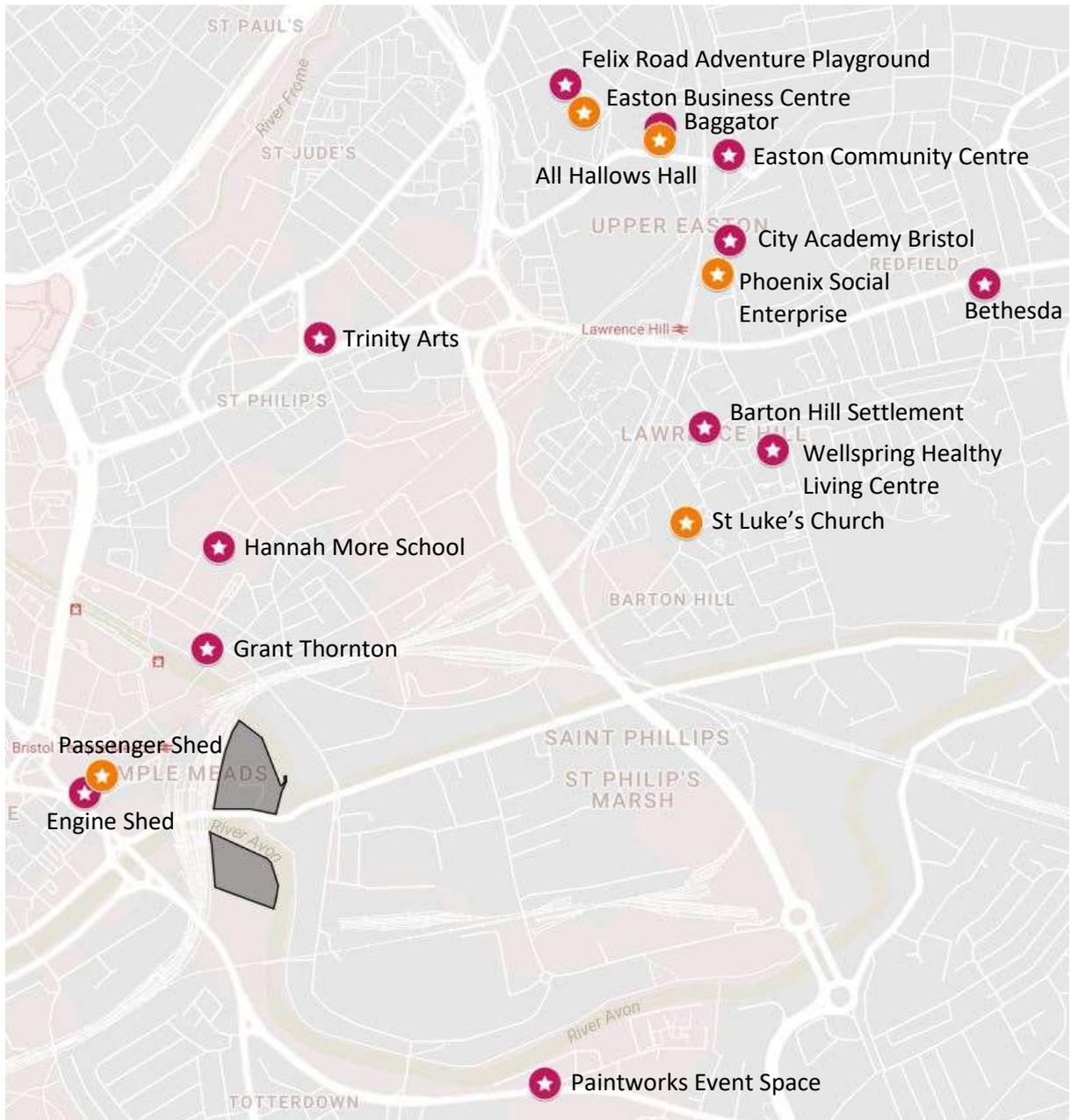
To view a google map of venues online use this link:

https://drive.google.com/open?id=1H832_CBmAC6IX3LL0yJlgbG6KLDlzk7h&usp=sharing

The map shows that community venue provision appears to be clustered in particular neighbourhoods, with particularly good provision in Easton and Barton Hill. There is a gap in St. Jude's and limited provision of spaces in the Old Market and Dings areas. St. Philips Marsh has no provision, reflecting the non-residential nature of the area.



A community event at the Trinity Centre



(Image source: Google maps)

3.2 Overview of local venues

Venue	Area	No. of rooms	Weekly users	Accessibility	Building condition
All Hallows Hall	Easton	1	Not known	Not known	Not known
Baggator / The Pickle Factory	Easton	3	100	Partially accessible	Good. Fixtures and fittings and signage OK. Energy efficiency poor.
Barton Hill Settlement	Barton Hill	9	1500	Fully accessible	OK to Good

Venue	Area	No. of rooms	Weekly users	Accessibility	Building condition
Bethesda Methodist Church	Church Road	3	Not known	Partially accessible	OK to Good
City Academy	Easton	All	500+	Fully Accessible	Good to Excellent
Easton Business Centre	Easton	2	Not known	Not known	Not known
Easton Community Centre	Easton	3	400	Fully accessible	OK. Internal spaces poor.
Engine Shed	Temple Quay	7	600	Partially accessible	Good to excellent, except energy efficiency (poor)
Felix Road Adventure Playground	Easton	5	400	Fully accessible	Mostly OK, structural integrity and outdoor space good
Grant Thornton	Temple Quay	8	Not known	Not known	New building
Hannah More School	The Dings / Old Market	18	450	Fully accessible	Structure and outdoor space good Energy efficiency poor
Paintworks Event Space	Totterdown	1	150-500	Fully accessible	Good to excellent, except energy efficiency (poor)
Passenger Shed	Temple Quay	1	Not known	Not known	Not known
Phoenix Social Enterprise	Easton	2	Not known	Not known	Not known
St Luke's Church Hall	Barton Hill	2	Not known	Not known	Not known
Trinity Community Arts	The Dings / Old Market	5	1,150	Fully accessible	OK to Good
Wellspring Healthy Living Centre	Barton Hill	8	Not known	Fully accessible	Good – excellent apart from internal spaces and visibility of building

There is a huge diversity of building types available for community use, ranging from 200-year-old churches to purpose built. In total 78 rooms were found in the research area that are available for hire by the public. It is worth noting that only three of the surveyed venues main function is the provision of bookable space – most do this in addition to their main function. 12 of the 13 respondents were either operating under a long term lease or were owner-occupiers of the building, indicating long term stability in the tenure of community space. All six registered charities that completed the survey operated with mixed funding arrangements which included donations and fundraising as well as grant funding, hire costs and rental income. Only two respondents (both limited companies) were exclusively financed through hire and rental income.

3.3 Facilities available

Venue	Large Hall	Second Hall	Meeting room	Kitchen	Parking spaces	Other
All Hallows Hall	✓					Stage area
Baggator / The Pickle Factory	✓				0	Screen and sound equipment, cinema space, catering, stage area, alcohol license, garden, Wi-Fi
Barton Hill Settlement	✓		✓	✓	0	Screen and sound equipment, hearing loop, catering, garden, crèche, office space
Bethesda Methodist Church	✓		✓	✓	0	Wedding license, cinema, stage and sound equipment, hearing loop, play equipment
City Academy	✓	✓	✓	✓	11+	Sports facilities, presentation equipment, sound and stage equipment, catering, cinema, licensed venue, office space, hearing loop, play equipment
Easton Business Centre			✓			Screen and projector, catering, Wi-Fi
Easton Community Centre	✓		✓		6-10	Screen equipment, cinema space, office space, alcohol license
Engine Shed	✓	✓	✓		5	Members business lounge, co-working space, office space, business incubator, screen and sound equipment, stage area, hearing loop, catering
Felix Road Adventure Playground	✓			✓	0	Sport facilities, screen and sound equipment, stage and stage lighting, catering, cinema, garden, play equipment (indoor and outdoor)
Grant Thornton			✓			Not known
Hannah More School	✓	✓	✓		11+	Sports facilities, screen and sound equipment, garden, play equipment (indoor and outdoor)
Paintworks Event Space	✓				11+	Sound and PA equipment, wedding license, Wi-Fi, outdoor space
Passenger Shed	✓					Not known
Phoenix Social Enterprise			✓			Not known
St Luke's Church Hall	✓	✓				Not known
Trinity Community Arts	✓	✓	✓	✓	11+	Screen and sound equipment, stage area and lighting, cinema, live ents and alcohol license, wedding license, garden
Wellspring Healthy Living Centre	✓	✓	✓	✓	11+	Screen and sound equipment, hearing loop, garden, office space, crèche

The number of surveyed venues providing facilities are as follows:

Large hall	11	Garden	6	Showers	4
Screen and projector	10	Office space	6	Indoor play equipment	4
Sound equipment/ PA	10	Hearing loop	5	Stage lighting	3
Accessible toilet	10	Catering	5	Wedding license	3
Hot drinks	9	Kitchen hire	5	Entertainment license	3
Meeting rooms	8	Cinema space	5	Outdoor play equipment	3
Whiteboard	7	Secondary hall	4	Crèche	2
Stage area	6	Alcohol license	4	Storage facilities	0

3.4 Summary of survey findings

The above paints a picture of a diverse and well-resourced offer of community spaces, although certain events provision (stage lighting, licensed premises) are fairly specialist and less available. There is also a clear lack of spaces with onsite crèche provision. One surveyed venue lacks an accessible toilet, and three listed themselves as 'partially accessible', indicating a need for investment to increase the accessibility of some community venues in the area.



Easton Community Centre's main hall

All survey respondents could list multiple activities that regularly took place in the venues, catering to a range of ages and groups in the community. The most common activities were educational activities, private functions and parties, community events and community group meetings. All venues managed their opening times in response to bookings. The busiest times were reported to be weekend afternoons, weekday afternoons and weekday evenings. There was less reporting of quiet times, but the answers indicated that about half the venues surveyed saw a reduced level of activity during school holidays.

A few comments were made by survey respondents about the potential impact of the new university campus. Two comments suggested the demand for community space was high and that further provision of smaller meeting spaces would be welcome. One respondent commented on the lack of community spaces with childcare provision. When asked about whether they would be concerned about the impact of community facilities at Temple Quarter Campus on their venue, two respondents said yes, four answered no, and one answered don't know. In terms of mitigating the impact, comments made suggested that knowledge of the University's offer to the community and a system of mutual signposting between local sites would be beneficial.

4. Interviews

22 semi-structured interviews were conducted with local stakeholders. The research team identified five neighbourhoods within the research area and sought participation from each geographical location. Participation was also sought from a range of

business representatives, service providers and local residents to allow the capture of broad perspectives in the data. Equalities data was collected from 15 participants.

4.1 Interview participants

	Business	Resident	Service	Sector
Easton	1	1	1	Business: Office space provider Service: housing association
St. Philips	3		1	Business: science laboratory space, enterprise hub, brewery Service: nursery
Old Market / The Dings		2	1	Service: arts centre
Totterdown	4	2		Businesses: community / enterprise hub, local shops
Barton Hill		3	3	Service: community venue, advice service, health provider

Equalities monitoring

Age		Sexuality		Disability	
Under 18	1	Bisexual	1	Yes	
18-30		Heterosexual	12	No	14
31-60	14	Lesbian or gay	1	Prefer not to answer	
61+		Prefer not to answer	1		

Ethnicity:		Faith:		Gender	
White English	6	Buddhist	1	Male	7
White Northern Irish	1	Muslim	3	Female	8
White British	4	No religion	8	Prefer not to answer	
Black African	3	Prefer not to answer	1		
British Italian	1	Other	1		
		Christian	1		

Interview data was collected through note taking and audio recordings and analysed thematically to draw out key issues, which are explored below. Interview participants have been anonymised for the purpose of reporting.

4.2 Connectivity

Eight participants felt a key aspect of the development's potential was the opportunity to improve connectivity and provide improved links across the whole area. Current access to the site is characterised by dark streets, oppressive infrastructure (such as tunnels under railway lines) and feels unpopulated and unsafe at night. Participants in Totterdown in particular mentioned the opportunities to improve access from their neighbourhood to other parts of the city, through improved access routes. Repeated ideas in the interviews on the theme of connectivity included:

- Improved bus connections
- Sustainable transport provision (bike hire scheme, car club)
- Improved access to Temple Meads from proposed Arena site
- Better provision for walking and cycling to and from, and across the site

A related point that was made by six participants was the relationship between the site and the surrounding neighbourhoods. The relationship of the boundaries of the University and the connections to surrounding areas were deemed as fundamental to encourage residents from the wider community to access the site. Ideas for addressing this included improved walking and cycling routes, access to the waterside, a shared space which connects a thoroughfare, and improving the safety and lighting of nearby streets. Wapping Wharf was mentioned a number of times as an example of good practice, and participants felt the success of that development was due to the access route through the site increasing footfall.



Wapping Wharf Development on Bristol's harbourside

'The University need to think about the lasting legacy - that will make a difference to people's lives. I think this is in the infrastructure and design. If it improves connectivity, accessibility and improves the area, people will appreciate the University being there.'

Interview participant
Old Market

Connectivity was also linked to aspirations for the site to embrace an inclusive approach to design and architecture. Points were made in relation to the height of buildings (tall buildings were seen by some participants as alienating), signage confirming that public are welcome, and accessibility for Disabled people. A key part of this was also the provision of green space (mentioned by five participants) or public space (mentioned by three participants). Overall, the design and access of the site was seen as very important to make the University development welcoming and accessible to the wider community.

4.3. Amenities and facilities

All participants talked about the potential of the site to contribute to the area through new amenities and facilities that were open to the public. The most popular ideas for new provision that could be publicly accessible are listed below (in brackets the number of participants who mention them).

- Cafés and restaurants (10)
- Shops (7)
- Leisure / sports facilities (6)
- Nursery / childcare provision (4)

- Swimming pool (4)
- Drs surgery or health centre (3)
- Theatre, cinema or exhibition space (2)
- Library (2)
- Kitchen space that could be used by the community (2)

4.4 Enterprise hub / hot-desking

Participants expressed support for an enterprise hub, but concerns were raised about potential competition with existing provision, particularly in relation to the Engine Shed expansion. Enterprise linked to technology and innovation were mentioned, particularly by participants involved in space provision. There was stronger support for a 'hot-desking plus' model (discussed by five participants), where access to light-touch business support could be offered alongside desk space. Ideas for what this could involve included:

- A 'business lounge' model where people have membership and a swipe card to access a desk space and Wi-Fi
- Hourly / daily hire of computers with access to particular software which can be prohibitively expensive to own – for example InDesign or Photoshop
- Desk space linked to advice and support for those starting new businesses
- Micro-offices
- A space where expertise could be hired – for example rather than an IT contract, could book slots of IT support by the hour
- Discounted rate to people in BS2 and BS5 to support local businesses

Overall the interviews point to a preference for lighter touch provision than an enterprise hub, recognising the existing planned expansion of Engine Shed in partnership with the University of Bristol. The ability to tap in to resources and expertise of the University for new businesses and self-employed people was a popular idea, and would create support for the community outside of the high tech industries associated with research at the new campus.

4.5 Meeting spaces

There is ambiguity in the interview data about whether a new publicly bookable event space would be a positive contribution to the wider community. Two interviewees thought that a large event space would be positive, and may be used for training and conference style events. However, six participants expressed concern about the impact this would have on existing provision – including those involved with the management of event spaces. A clearer gap in provision was identified in medium size meeting spaces that could be used for regular weekly bookings for classes, exercise and activities. Participants in Old Market and Totterdown identified a gap in provision of local community space, but felt that the University site was not local enough to meet their needs.

4.6 Employment and training

The employment opportunities arising from the construction, servicing and teaching / research at the University were identified as clear benefits to the area, and there was

a clear sense of opportunity for the University to target these opportunities to the local population through:

- Provision of basic numeracy, literacy and ESOL training for local residents to develop employability in the local community.
- A 'job shop' facility where jobs can be advertised and wider employment advice and support could be accessed.
- Outreach scheme to target and promote employment opportunities for local people.

'I will be really sad if Somali people are only doing the cleaning jobs. You have an example at Cabot Circus of a development on our doorstep, and how little it did for the community.'

Interview participant
Barton Hill

4.7 Concerns about the development

The most common area of concern about the possible impact of the University development on local communities was the capacity of existing infrastructure and services to accommodate a rising population. 11 participants mentioned the impacts on parking, congestion, health, school and service provision. Other concerns related to the impact on local rents and housing availability, and problems associated with 'studentification' such as litter and noise.

There was significant concern from some participants about the height of proposed buildings. This was stronger from participants in Totterdown and Old Market, perhaps due to proximity to the site. Concerns about the tall buildings included the alienating, institutional and hostile environment they create, not being amenable to public space, and the worry of them setting a precedent across the area.

Interviews placed the proposed campus in the context of a wider process of change. This was raised by all participants in St. Philips, which is viewed as an area under increased pressure from residential development – 'the last untouched part of the city'. With this recognition came concern about the displacement of industry, the need for employment in central locations and to balance the mix of use in an area.

'Maybe the tyre workshops won't always be here, but there will always be a need for employment'

Interview participant
St. Philips

The danger of the University exacerbating existing inequalities in the city was raised by some interview participants. One participant mentioned that the investment in the city and the 'shiny new buildings' felt removed from daily life in Easton, and that it added to a sense that investment in the city was not going where it was most needed. The new campus may feel exclusive, closed off and unwelcoming if it only caters to the needs of staff and students. One participant talked about the diversity of uses creating a diversity of users, which in turn makes a space feel inclusive, suggesting that, for example, if there was a very high ratio of male students and staff, it may not feel very welcoming to women.

4.8 Positive outcomes from the University development

Many participants expressed that overall they felt the University would be good for the area, and bring a 'dead' part of the city back in to positive use. In particular, people expressed that the following benefits would be important:

- Increased density of population will be good for local business.
- Employment opportunities.
- Attracting skilled people to the city.
- Improved access and transport links.

'Overall this could be a really good asset for the area and break down barriers to university.'
Interview participant
Easton

4.9 Building links with the community

Participants were asked about potential opportunities for the University to build links with the communities around the campus site. There was strong support for a programme of events that were clearly targeted at local communities. For example, public access to talks related to research and new technologies, educational events aimed at families (especially during school / university holidays), public access to lectures, training events to support local people to apply for clerical, reception and similar jobs at the University. One participant mentioned a Diversity in STEM event they attended, and suggested bringing events like that out to community venues in diverse communities, such as the Malcolm X Centre.

Raising aspirations: Good practice example

Unit DX provides highly specialised lab space for emerging businesses in cutting edge science and engineering. Each month, 60 Bristol school children are invited to an outreach day, where they take part in laboratory experiments, meet people working in the science sector to inspire more young people in to jobs in science.

Raising aspirations in the local neighbourhood was viewed as a key opportunity in the campus location, and this was particularly expressed by participants who worked in local service provision. Participants discussed the barriers to university entry for disadvantaged students, and whether the contextual offer programme could be extended for local students. There was recognition that in the specialist areas that the new campus will focus on, there is a long educational

pathway to high skilled work, so inspiring young children is key. Links to schools came up in many of the conversations as an appropriate avenue to embed the University in the local community and make the opportunities available to local children. Programmes in local schools, school visits to the sites and demonstrations from students and staff were popular ideas for engaging young people in what happens at the University.

One interview participant talked about the importance of becoming a good neighbour through a stepped approach to getting people to engage in a new space. First offer a familiar opportunity in a familiar space, second an unfamiliar opportunity in a familiar space, and then offer something in a new space. The University could develop their support for skills, training and employment on this basis – perhaps initial courses and

taster sessions in the community, with the follow up courses available at the University campus.

5. Identified gaps in provision

This section aims to bring together findings from the community mapping, survey data and interviews, and points to opportunities for the Temple Quarter Enterprise Campus.

5.1 Business space

Recent developments in the St. Philips area appear to be moving away from traditional industrial and warehousing towards more highly skilled employment. A trend for the innovative repurposing of industrial / warehouse buildings to accommodate a diversity of highly skilled jobs in sectors including productions, creative industries, high tech and science and research is occurring. The University of Bristol is already a key partner at the forefront of some of these developments, but the indication is also that a creative and energetic set of start-ups require a space to thrive in the city.

- The Meriton Foundry in St. Philips is providing a custom built offer between hot-desking and specialist space. Tenants requirements include workshops, music studios and production space.
- Paintworks offer hireable desk space and workspace on a monthly contract. This is a well-established site with limited availability due to its popularity.
- Unit DX provides specialist lab space catering to a highly specialised science sector. It has strong links with the University of Bristol and provision of space for research 'spin outs'. Potential for expansion and mutual benefits from the new campus site in close proximity.
- Bristol Spaceworks – five repurposed sites housing offices, studios and workspaces.
- Engine Shed expansion in partnership with the University of Bristol demonstrates the success and demand for enterprise development space.

Providers that we interviewed reported that there was low levels of vacancy and high levels of demand when new sites are made available for offices, studio, workshop and laboratory space. Supported hot-desking space was identified as a gap in provision, balancing the need to meet demand for supporting enterprise development whilst complementing a creative and expanding sector. The mapping exercise did not find large numbers of hot-desking and co-working spaces in the commercial centres, perhaps indicating their concentration in the city centre.



Creative start up on Old Market

5.2 Rentable kitchen space



Food enterprises seek space in Bristol

A lack of appropriate facilities for kitchen spaces to support new enterprises was reported in interviews. Demand is increasing from catering businesses that require access to professional kitchen space, but don't have the start-up funding to pay for full time rental of premises. Enterprise ideas around food are coming forward, particularly from women from migrant communities. A hireable kitchen space could also provide pop up cafes or restaurants on the university campus, bringing a changing food offer to the site.

Survey findings reported that five kitchen spaces were available for hire in the research area, which may suggest good provision. However, interview participants mentioned the limited availability of these spaces as they are often inaccessible when other bookings take place. The suitability of community kitchens for business needs was also raised. There is potential for a deeper scoping and analysis of food businesses that would utilise provision, and exploration of a pop up food offer to support food businesses. Somali, Syrian and east African food enterprises which have been seeking potential sites to develop their food enterprises were identified in the interviews.

5.3 Healthcare

Healthcare provision was raised as one of the highest areas of concern by interview participants. The perception of overstretched health services, difficulties accessing appointments and local services being at capacity was corroborated in our interview with a local health provider: *'If the student population increases, there will need to be additional provision, as there isn't capacity locally.'* Support for health provision to mitigate the impact of the student population on existing provision, and with potential to provide increased health provision to the public in a rapidly developing part of the city was popular. This lack of provision is visible in the mapping data, which shows the two nearest GP surgeries are Lawrence Hill Health Centre (20 minutes' walk) and Wellspring Healthy Living Centre (25 minutes' walk).

5.4 Childcare

There was strong support for nursery and childcare provision at the University site. As with healthcare, this was seen as a key mitigation of the increased residential and working population. The common perception of a current lack of provision was slightly contradicted in an interview with childcare provider in St. Philips, who suggested there is potential for growing capacity at existing services to support the childcare needs of students and staff: *'If they want to integrate with the community they should work with the provision that already exists - we could work with them to see what they want - we have everything here and we're a ten minute walk away.'*

12 nurseries and children's centres were identified in proximity to the proposed site. Six of the mapped nurseries have provision for age 2 to 5 years. Two of these cater only for those eligible for free childcare provision for 2-3 year olds. Six nurseries offer

childcare for under twos, indicating this is the age range where provision is lacking in the research area. The findings point to an opportunity to work with existing providers to enhance provision where gaps exist.

5.5 Community spaces

As discussed at section 3.4, the venue survey revealed a strong and diverse offer of community space for a range of different activities across the research area, with localised gaps identified in Old Market and Totterdown. A number of residents were sceptical about whether they would hire meeting space at the new campus, citing that they depend on spaces in the heart of a localised community. Residents in Totterdown also mentioned the development of the Totterdown Centre which they



Empty shop on Wells Rd being repurposed for community use

hoped would include provision for a community meeting space. There was more enthusiasm for accessing a space because an activity was on that residents want to attend (event, yoga class, lectures etc.). This was supported by the venue survey and interviews which suggested that spaces for regular classes are difficult to find. There is therefore an opportunity for the University to provide rooms for regular evening activities and classes that are open to the public.

There was ambiguity about the need for larger event spaces in Bristol. One interviewee reported struggling to find spaces in Bristol for regular tech industry conferences for 70 delegates. This was somewhat supported by an interviewee who manages a large event space, and reported that smaller and medium sized venues (50 capacity) would fill a gap in local provision.

5.6 Leisure

There was perhaps an unsurprising enthusiasm for the provision of additional leisure amenities in the area. The mapping exercise suggests a lack of provision, and this was reflected in the interviews, with a particular mention of lack of public swimming pools. The mapping does have limitations however, as private membership gyms were not comprehensively mapped. They are often not located on main commercial streets, so further investigation of existing provision may be required.

5.7 Retail

There is clear enthusiasm that the increased population associated with the new campus will support existing businesses, but this was accompanied by a recognition that the current retail offer is not diverse enough or in close enough proximity to the site to service the needs of students and staff. A lack of provision of supermarkets, grocery stores and fresh fruit and veg is clearly visible on the map. The nearest commercial area to the site is Temple Quay, where the retail offer is already limited considering the density of employment. The next nearest commercial centres are Old Market and Totterdown. Although two small supermarkets are present on Wells Road, interview participants suggested there was a need for a larger supermarket. Old Market has a low ratio of grocery and fresh food options, which was again highlighted in interviews. As well as support for a supermarket and grocery provision, a number of interview participants suggested a preference for independent retailers to be present on the site to add character and support local businesses.



Local businesses are rejuvenating Old Market

5.8 Food and Drink

Cafes and restaurants were seen as an important part of provision on the campus site, offering opportunities for socialising and an attraction for local residents. The mapping data shows a lack of provision, with a few cafes at Temple Quay serving a large business district. There is a particular lack of evening venues. A range of opening times to provide evening animation on the campus site was mentioned in interviews as key to enhance safety and animation of the site. Old Market and Totterdown offer a good range of pubs and restaurants which could benefit from the development.



Food and drink provision at Temple Quay is limited

5.9 Amenities and services

The mapping of amenities and services showed that there is a low level of some amenities and services. There are no pharmacies in close proximity, the closest is on Wells Road. Advice agencies are clustered around Stapleton Road and Old Market, often due to the population demographic they support. There was interest in the provision of employment support and advice as part of the campus, which appears to be lacking in the neighbourhoods. There are no bank branches in the research area.

There is a cluster in Broadmead / Cabot Circus and two in Knowle West. There are four post offices in the area, the closest on the western end of Wells Road.

6. Conclusions and recommendations

As the University of Bristol campus will animate a long derelict site, there is ample opportunity to improve the provision of local services and retail offer for the student population as well as neighbouring communities. This research shows that there are dynamic and creative sectors providing event space, enterprise and business development support, and the University of Bristol already plays an active role in supporting this development. It also points to a thriving local retail and food and drink offer in local commercial centres, characterised by independent local businesses. However, there are clear gaps in service and retail provision that residents, businesses and service providers are concerned will need to be enhanced to support an increased population both of student residents and employed staff at the new campus site. Whilst this data shows where existing provision is lacking, and local demand may be strong, a full business case for each option would need to be developed. The priorities identified from this research include:

- Provision of an affordable grocery and fresh food offer which services the student residences and is accessible to the wider community.
- Café / restaurant space which is clearly open to the public, enhances public space and preferences local independent businesses.
- Investigate further the option of providing a hireable kitchen space / restaurant pop up to support development of local food enterprises, particularly working with migrant communities. A partnership of local groups has already been meeting to scope feasibility, who can be put in touch with the University of Bristol Temple Quarter Enterprise Campus team.
- Prioritise access to flexible, mid-sized spaces for community activities such as classes, training events and talks.
- In terms of enterprise development, there is a huge amount of activity already going on, much (such as Unit DX and Engine Shed) in partnership with the University of Bristol. This research shows that there could be space in this market for additional provision for a membership based hot-desking facility that has affordable access to business support.
- This facility could be linked to a job shop or skills centre, that supports local communities to develop employment skills and access opportunities at the University of Bristol through CV support, training and advertising of roles.
- Develop a strategy for health provision for the increased student population and share with local communities. If provision is to be on the new campus site, explore if this could extend to local population.
- The research indicates there may be a business case for certain services and amenities to be provided on site, including childcare provision, swimming pool and leisure facilities, a pharmacy and local bank branch.
- Childcare provision was seen as a need but the potential to work with existing providers to meet this need, rather than create new facilities was identified.
- A theme linking many themes of conversations was the accessibility of the site. An inviting and inclusive public realm, which is animated and invites people to stay, and links up access routes to surrounding neighbourhoods is viewed as

key to the success of the development's ability to engage with the wider community.

- Outreach and engagement, building on existing activities to build trust and develop skills in east Bristol communities will create opportunities for the local community. A key theme is raising aspirations – both in the employment opportunities available to the local community and the aspiration to access university education for young people.

Appendix A: Findings from mapping of retail and other services Research report compiled by Up Our Street, May 2018

A comprehensive map of the study area has been created on google maps and is accessible using the following link:

<https://drive.google.com/open?id=12bUltGpSTIFYZzPmDcBCCSDhGznX8ah9&usp=sharing>

Approach

Researchers visited main high streets in the research area in May 2018. Using a code system, buildings with active frontages were categorised and later mapped using Google maps. The codes used are visible in the notes on the map labels, and are based on planning use designations. Nine layers on the map represent overarching categories, with different coloured markers showing the spread of amenities and services across the area. Additional sites of importance outside the high street areas have been added to the map from survey responses, local knowledge and supported by internet research.

Items have been added under the following categories:

- **Retail** (bright blue marker) and **retail services** (pale blue marker)
Retail stores have been labelled with the following sub-headings: supermarkets, groceries, fruit and veg, specialist retail, fashion, domestic goods, florist and pharmacy.
Retail services have been sub-headed as betting shop, estate agent, travel agency, salon, financial services, internet café, laundrette and specialist services.
- **Cafes and restaurants** (purple  symbol)
Subheadings have tried to differentiate between fast food, restaurants and cafes.
Specialist cuisine is added to the label to give wider understanding of the local food offer.
- **Licensed venues** are marked in yellow. These are labelled to show pubs, bars, and entertainment venues (including night clubs).
- **Hotels** are shown in grey .
- **Community services** are labelled in green, and symbols are used to highlight leisure centres , GP surgeries , libraries  and banks .
- **Community venues** are marked in red . Community venues are understood as spaces that offer event or meeting spaces which are publicly available, and may be utilised by the local community.
- **Faith centres** are marked in brown.
- **Offices and workspaces** are marked in orange  and labels aim to highlight types of workspace of particular interest including enterprise hubs and studio space.
- Areas of **public realm** are highlighted in the commercial centres , but not mapped across the whole area.

Findings by area

	Retail	Supermarkets	Retail services	Restaurants	Cafés	Fast food takeaway	Community service	Event venue: conference community	Faith Centres	Pub / bar	Office	Enterprise hub	Club / Entertainment venue	Hotel
Wells Road	9	2	10	7	2	6	3	0	2	3	0	1	0	0
Temple Quay	5	0	1	1	7	0	4	2	0	4	17	1	2	2
Old Market	21	0	15	3	4	2	11	1	0	8	4	0	8	0
Stapleton Road	42	0	24	2	7	20	6	2	3	3	2	0	0	0
St Marks Road	8	1	4	3	2	2	0	0	2	1	0	0	0	0
Lawrence Hill and Church Road	48	3	42	3	9	13	9	1	4	7	0	0	0	0

Wells Road

The mapping of Wells Road covers the area between St. Johns Lane and Wells Road junctions. Wells Road has a low number of community services, with just one nursery, a post office and one GP surgery. Community services in Knowle were added to the map after reference was made to these during the interviews, to demonstrate the distance to amenities including banks and leisure facilities. Only eleven retail outlets (including two small supermarkets) are counted on Wells Road, but there is variety within these. There is no community centre or venue in the locality.

Temple Quay

Unlike other areas that were mapped, Temple Quay is not laid out as a main thoroughfare or high street. The count is of the provision in the Temple Quay area including Temple Back, Station Approach and Avon Street. The high level of offices reflects the business district, but there is a comparatively low number of supporting amenities such as cafes, restaurants and retail provision, with only five shops and seven cafes counted. There is only one restaurant which is located outside the main business district, suggesting a lacking night time economy, although there are two clubs located underneath Temple Meads. There are two event / conference spaces on Station Approach, again reflecting the business district nature of the area. There is one nursery in the immediate vicinity.

Old Market

Old Market and West Street form one of the most historic commercial streets in Bristol, and is of significant heritage value. The area is undergoing rapid change as large scale residential schemes are developed in close proximity to the high street. The mapping of this area covered Old Market from Temple Way roundabout, continued along West Street as far as Trinity Road. Old Market has a high number of amenities including retail, retail services and food outlets. There is a very high number of community services (11), particularly advice and youth support agencies. Old Market has eight pubs and eight entertainment venues, reflecting the strong night life of the street, which is particularly associated with Bristol's gay community. The main gap in provision is in retail, with no supermarket, with only two grocery and one fruit and veg store, evidencing a lack of fresh food provision.

Stapleton Road

Stapleton Road is one of the longest high streets in Bristol. The mapping exercise covers the start of Stapleton Road at the junction of the A420 and continues as far as the railway bridge at Warwick Road, where a natural break in the active shop frontages occurs. Stapleton Road has a reputation for independent retailers catering to a diversity of cultures, and this is reflected in the mapping exercise. There is a mixed retail offer and 17 grocery or fruit and veg retailers, yet no chain supermarket. There is a very high number of eateries on Stapleton Road, again reflecting the diversity of the population with Somali, Ethiopian and Caribbean food available. There is a significant percentage of fast food takeaways, with 20 along the high street, compared to seven cafes and two restaurants, perhaps suggesting a poor food environment in terms of healthy eating.



Stapleton Road at St Jude's



St Marks Road

This is a small high street in Easton, supported largely by the Sweetmart international supermarket. There is a good range of grocery and domestic goods retail as well as eateries.

Lawrence Hill and Church Road

Lawrence Hill and Church Road form a continuous commercial street along the A420, serving the residential neighbourhoods of Barton Hill, Redfield and St George. The counts cover the high street from Lawrence Hill roundabout as far as St Georges Park. Unlike other high streets in the area, there are three chain supermarkets present on Church Road. The food offer is varied, and represents a mixed community. There are faith centres serving four different faith communities (Hindu, Sikh, Christian and Baha'i). There are no private office space and no entertainment venues, although there are seven pubs.

Findings across the study area

Many retail and service categories were found to have a fairly even distribution across the study area, such as domestic goods, estate agents, financial services, salons, florist, fruit and veg and pharmacies. Fashion retail appears to be clustered on Stapleton Road and Church Road, perhaps reflecting the length of the street and ability to cater for a diversity of shops. There is also a much higher level of grocery provision on these two streets, and a marked lack of grocery stores on Old Market.

There is a good spread of cafes and eateries across the area, although Stapleton Road in particular appears to be dominated by fast food takeaway provision.

There are no banks in the research area. Five were added to the map in Knowle and Cabot Circus to show nearest provision. There are four post offices in the research area on Stapleton Road, Wells Road and two on Church Road.

Nine supermarkets have been identified across the area, but these are not evenly distributed. There is no supermarket provision on Old Market, Stapleton Road or Temple Quay.

Six GP surgeries were added to the map that serve the population of the research area, with Lawrence Hill Health Centre and Wellspring Healthy Living Centre closest to the development site.

At first glance the spread of community venues appears fairly well distributed across the mapping area, with clusters in the Easton and Barton Hill areas. Difference in the provision and size of venues is considered in more detail in the main report.

There are nine nurseries within the study area, although three bordering the area have been added to the map to demonstrate local provision. It is worth noting that six of the mapped nurseries make provision for children aged 2+, with five offering provision for younger children (3months to 5 year old).