



Temple Quarter Development Framework

April 2023

Bristol City Council, Network Rail, Homes England,
West of England Combined Authority

Temple Quarter Development Framework

April 2023

Bristol City Council

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PART 1

OVERVIEW

Chapters 1-4 set out an overview of the Development Framework study, including an introduction to the document, a summary of existing context across the wider area, a description of the outcomes from preliminary stakeholder engagement processes and a summary of the area-wide strategy.

The background is a solid blue color. There are two large white geometric shapes: a triangle pointing downwards in the upper-left quadrant and a triangle pointing upwards in the lower-right quadrant. The text '1 Introduction' is centered in the blue area between these two shapes.

1 Introduction

1.1 This Development Framework Study

1.1.1 Scope and purpose of the Development Framework Study

This document provides a framework for the future development of Bristol Temple Quarter & St Philip's Marsh, a 130-hectare area surrounding Bristol Temple Meads railway station. It been commissioned by Bristol City Council, Network Rail, Homes England and West of England Combined Authority, referred to in this document as the 'client partnership'.

The scope of this study is to examine and reimagine the long-term future of the area. It sets out a vision to create an area of the city that achieves a mix of truly affordable housing, new employment, significant social outcomes from development, addresses challenges posed by the climate emergency and ecological emergency, promotes sustainable travel and supports post-Covid recovery.

The study identifies opportunities for the future and proposes a set of principles and concept designs to guide their progression. Short, medium and long term interventions are considered, from temporary meanwhile uses through to enabling infrastructure and construction of new homes and workplaces which will help to guide the future of the area over the next 25 years and beyond. The proposals have been subject to a comprehensive and iterative deliverability appraisal to test their financial viability.

Throughout this study, sustainable and inclusive development principles have been adopted with people at the centre. The Development Framework

Study is intended to be flexible, providing guidance for future developments promoted in Bristol Temple Quarter. The principles should be used alongside other statements of the Bristol City Council's strategic ambitions such as the One City Plan and Social Value Toolkit.

The Study has been subject to public engagement during its preparation and formal consultation.

In June 2022, government funding was granted to further our vision for Bristol Temple Quarter & St Philip's Marsh.

Character areas

In this report, the Bristol Temple Quarter & St Philip's Marsh area has been subdivided into six smaller areas to reflect the local character, opportunities and constraints, and level of required design detail for each:

- Bristol Temple Meads Station
- City Gateway
- The Friary North
- Temple Gate
- Mead Street
- St Philip's Marsh

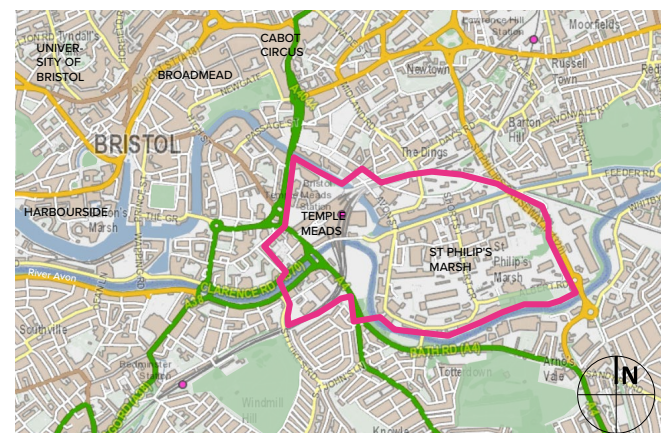


Figure 1 Study area location

**BRISTOL TEMPLE QUARTER &
ST PHILIP'S MARSH**



Figure 2 Study area boundary

Masterplan proposals

Set out in Part 2 of this document

The purpose of the Masterplan proposals for Bristol Temple Meads, the City Gateway and the Friary North is:

- To inform a Strategic Outline Business Case for a programme of public realm and railway station improvements
- To draw together aspirations and requirements from different parties into illustrative RIBA 2/GRIP 2 design outputs. This includes architectural concept designs with a view to further design and outline planning applications for the following key elements:
 - Internal station improvements
 - A new Northern Entrance and Southern Gateway
 - A reconfigured public transport interchange and relocated car parking
 - New public realm and movement routes
 - New buildings
- To inform further engagement and consultation with businesses, residents and wider stakeholders, as well as public consultation
- To demonstrate the financial viability of the proposals, giving confidence to public funding bodies and private investors
- To present a clear list of priority projects that can deliver early benefits
- To present outline phasing for medium and long term interventions

Development Framework proposals

Set out in Part 3 of this document

The purpose of the Development Framework proposals for Temple Gate, Mead Street and St Philip's Marsh are:

- To present flexible, guiding concepts for future employment and residential development interventions in Temple Gate, Mead Street and St Philip's Marsh
- To present an evidence-based concept for enabling infrastructure in St Philip's Marsh and a future innovation district and communicate the complexities associated with development in this area
- To inform strategic decision-making in Bristol and the wider West of England, in parallel with the Bristol Local Plan Review
- To raise the profile of these areas for prospective investors
- To present a clear list of priority projects
- To present outline phasing for medium and long term interventions

For St Philip's Marsh, a less advanced level of detail is provided, as further detailed work and engagement with local business and residents is required to understand opportunities for future development.

For Mead street, more detailed work has been undertaken, chapter 9 reflects the current status for the area

1.1.2 Development Framework Study levels of detail

The proposals within this document are presented in different levels of detail for each area, reflecting their current planning status and the differing levels of complexity and challenges associated with each. An example of this is the need for detailed designs of flood defences at St Philip's Marsh. These areas are grouped in 'Masterplan proposals' and 'Development Framework proposals', set out in Parts 2 and 3 of this document respectively.

Three of the six areas are well understood, are likely to happen first, and are presented as a more detailed Masterplan (Bristol Temple Meads, City Gateway, and the Friary North). As consultations were held for the Mead Street Development Brief in 2022, chapter 9 reflects the current status of this area. The remaining two areas are set out as a series of principles contained in a Development Framework with more detailed work to come in future.

In addition, initial strategic considerations are presented for areas adjacent to St Philip's Marsh, including Silverthorne Island, Temple Island, the University of Bristol Enterprise Campus.

1.1.3 How the Development Framework Study was prepared

This Development Framework Study sets out the combined aspirations and objectives of the client partnership (Bristol City Council, Network Rail, Homes England and West of England Combined Authority) through evidence-based proposals to inform further conversations about the future development of the area.

It has been prepared by Mott MacDonald, a global multi-disciplinary consultancy with planning and placemaking expertise, in partnership with Weston Williamson & Partners, supported by Deloitte and other firms including 3Adapt, Alan Baxter Associates, Avison Young, AWW, Turley and Pragma.

The study is underpinned by a robust evidence base and has been undertaken in parallel with a number of third party studies and projects that have direct influence on the future of the area. Where possible, this Development Framework Study has been developed to align with these interfacing projects. The two most notable are an updated Bristol Employment Land Study and the Bristol Avon Flood Strategy, both commissioned by Bristol City Council. In addition, there are emerging development proposals in the study area, such as the University of Bristol Enterprise Campus and Temple Island, which are outlined in Section 2.4.

The key proposals presented in this study have been subject to a rigorous and iterative analysis of deliverability. The findings of this exercise have informed the phasing and priority projects presented in this report. This is with the exception of Temple Gate and St Philip's Marsh areas presented in Part 3 (chapters 8 and 10), which are presented to a conceptual level of design.

The study is based on information collected up to April 2020, coinciding with the early stages of the COVID-19 pandemic. The potential impacts of the pandemic and considerations for this study are explored briefly in Section 2.5.15.

This report has been produced in parallel with a preliminary stakeholder engagement exercise that has been undertaken with community, business and other interest groups between Autumn 2018 and Spring 2020. Key issues and themes identified through this process have informed the Development Framework approach, as outlined in Section 2.5.13. Further detailed stakeholder engagement will be undertaken to finalise the Development Framework and to inform future stages of planning and design.

1.1.4 Status of the Development Framework Study

This document is an evidence-based study by independent consultants. The vision it represents has been endorsed by Bristol City Council as of March 2021. Following consultation in January to March 2023, the Development Framework will be presented to Bristol City Council's Cabinet for endorsement in May 2023. If endorsed, it will become a material planning consideration in the determination of planning applications within the Temple Quarter Area.

1.1.5 Project governance

This study has been governed through a bespoke forum of the four client partners: Bristol City Council, Network Rail, Homes England and West of England Combined Authority. This has included extensive collaboration to achieve desirable, shared outcomes. This study has also been supported by parallel governance and approval processes within the individual organisations.

The three tiers of governance were:

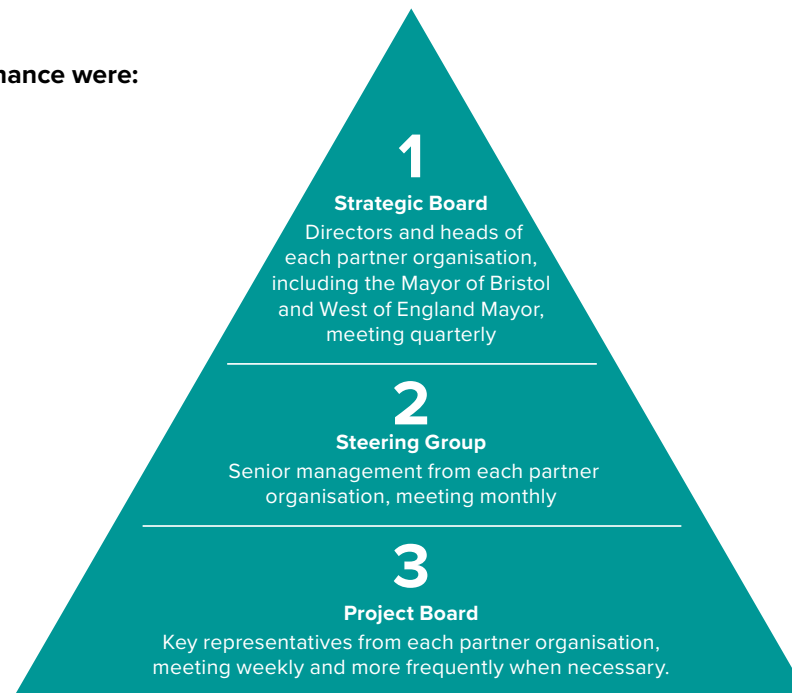


Figure 3 Project governance structure

1.1.6 Structure of the document

Part 1 | Overview

- Chapter 1** provides an **introduction** to this Development Framework Study, how it was developed and how it aligns with other city priorities
- Chapter 2** summarises the overarching **planning and development context** for Bristol Temple Quarter & St Philip's Marsh and the **objectives** which have informed the proposals
- Chapter 3** presents the overarching **vision** for the study area, encompassing Bristol Temple Quarter & St Philip's Marsh, and the **guiding principles** that have informed the proposals
- Chapter 4** presents an **overview** of the Temple Quarter Development Framework, focussing primarily on the areas to the west of Bristol Temple Meads. This includes recommendations for the next stages of **delivery**

Part 2 | Masterplan

- Chapter 5** presents a masterplan for **Bristol Temple Meads Station**, including improvements to internal passenger circulation, passenger facilities and a new Northern Entrance
- Chapter 6** presents a masterplan for the **City Gateway**. This includes the public transport interchange, new retail, and other public realm and infrastructure improvements around the station
- Chapter 7** presents a masterplan for the **Friary North**

Part 3 | Development Framework

- Chapter 8** presents a development framework for **Temple Gate** and the **Bristol & Exeter Yard** area
- Chapter 9** summarises the updated Development Brief for **Mead Street**
- Chapter 10** presents a conceptual development framework for **St Philip's Marsh** and initial strategic considerations for an innovation district

Appendices

- Appendix A** presents a list of **reference documents**
- Appendix B** presents a list of **figure credits**
- Appendix C** presents a **glossary** of terms used in this report
- Appendix D** contains **additional context** on employment, retail and heritage
- Appendix E** presents feedback from **stakeholder engagement** and responses

2 Bristol Temple Quarter & St Philip's Marsh Context

2.1 Introduction

This chapter summarises the overarching planning and development context for Bristol Temple Quarter & St Philip's Marsh and the objectives which have informed the proposals.

This chapter is structured as follows:

- Section 2.1 **introduces** this chapter and the **regional context** of Bristol
- Section 2.2 summarises the **strategic context and Bristol-related publications** that are relevant to this study, including Bristol's One City Plan, declaration of a Climate and Ecological Emergency and the West of England Local Industrial Strategy
- Section 2.3 summarises key **planning and transport policy documents**, including the National Planning Policy Framework and local policy documents
- Section 2.4 outlines the proposed development context, including **other development schemes** in the area and commentary on **the local market**
- Section 2.5 summarises **strategic considerations** and objectives for key topics to inform the proposals, such as movement, heritage, housing and stakeholder engagement. This also includes some brief considerations of potential COVID-19 impacts
- Section 2.6 **concludes** the chapter with a summary of the **principal constraints and opportunities** that have informed the vision, and the interrelationship between them

2.1.1 Bristol city-wide and regional context

Bristol is the largest city in the south west of England, with a population estimated to be 463,000 people. It is considered to be one of the ten 'cores cities' of Great Britain (it is part of the core cities network). The city straddles the River Avon and its former city-centre port is a cultural hub. Bristol is one of the UK's most popular tourist destinations and is recognised as one of the best city's in Britain in which to live (The Sunday Times, 2017). Bristol won the EU's Green Capital Award in 2015.

The Temple Quarter Development Framework area is an area comprising approximately 130 hectares located to the south-east of Bristol city centre. Somerset Street, St Luke's Road and Temple Way form the western boundary. The River Avon forms a Southern boundary, St Philip's Causeway forms an eastern boundary, and the railway lines connecting to Bristol Temple Meads form a boundary to the North.

2.1.2 Urban character

Bristol is characterised by a patchwork of diverse urban quarters interlinked to form a poly-centric city. This patchwork extends across the city centre from the revitalised mixed-use Wapping Wharf development along the Harbourside, the Georgian Terraces of Clifton, the independent shops and cafés of Gloucester Road, the artistic and free-thinking Stokes Croft to the industrial Temple Quarter; each with a unique sense of place and identity. These are illustrated on Figure 4.

Bristol's built fabric is made up of a variety of building types, densities and scales which reflect the many phases of development that have shaped the city throughout its history, and which are being embraced by Bristol City Council as a template for future densification. This diverse stock of building types creates a resilient offer to meet the needs of a wide range of potential residents or businesses.

The office and retail markets reflect the city's poly-centricity, which effectively divides the city centre into distinct sub-areas with unique retail and office markets such as Finzels Reach, Queen Square, Victoria Street and Castle Park.

The mosaic of distinct urban areas creates a varied and dynamic city with something to offer a wide range of people, yet it also masks significant socio-economic disparities between affluent and deprived areas. Clifton which contains areas in the 20% least deprived areas of the UK compares with Lawrence Hill which contains multiple areas that fall within the top 10% most deprived areas in the UK, according to the 2019 Index of Multiple Deprivation.

This poly-centricity has also occasionally contributed to a sense of disintegration between different areas of the city which presents challenges for movement and continuity of urban activation, especially in areas where major roadways or infrastructure create severance between communities. This is indicated in the Bristol Local Plan Review (2019) which illustrates the role of roadways to act as barriers between areas of different land use.



Part 1 - Overview

Part 2 - Masterplan

Part 3 - Development Framework

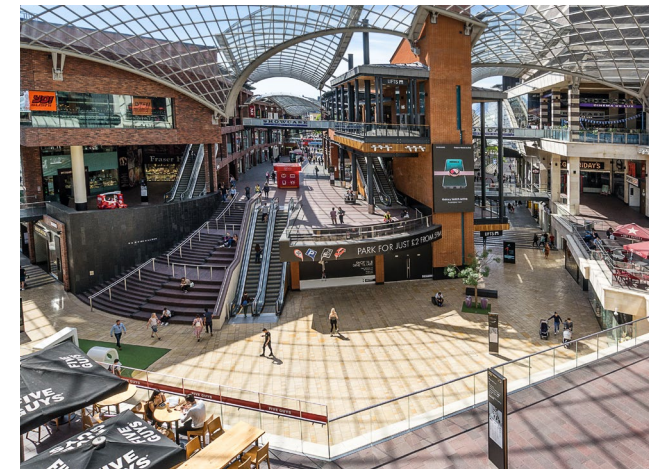
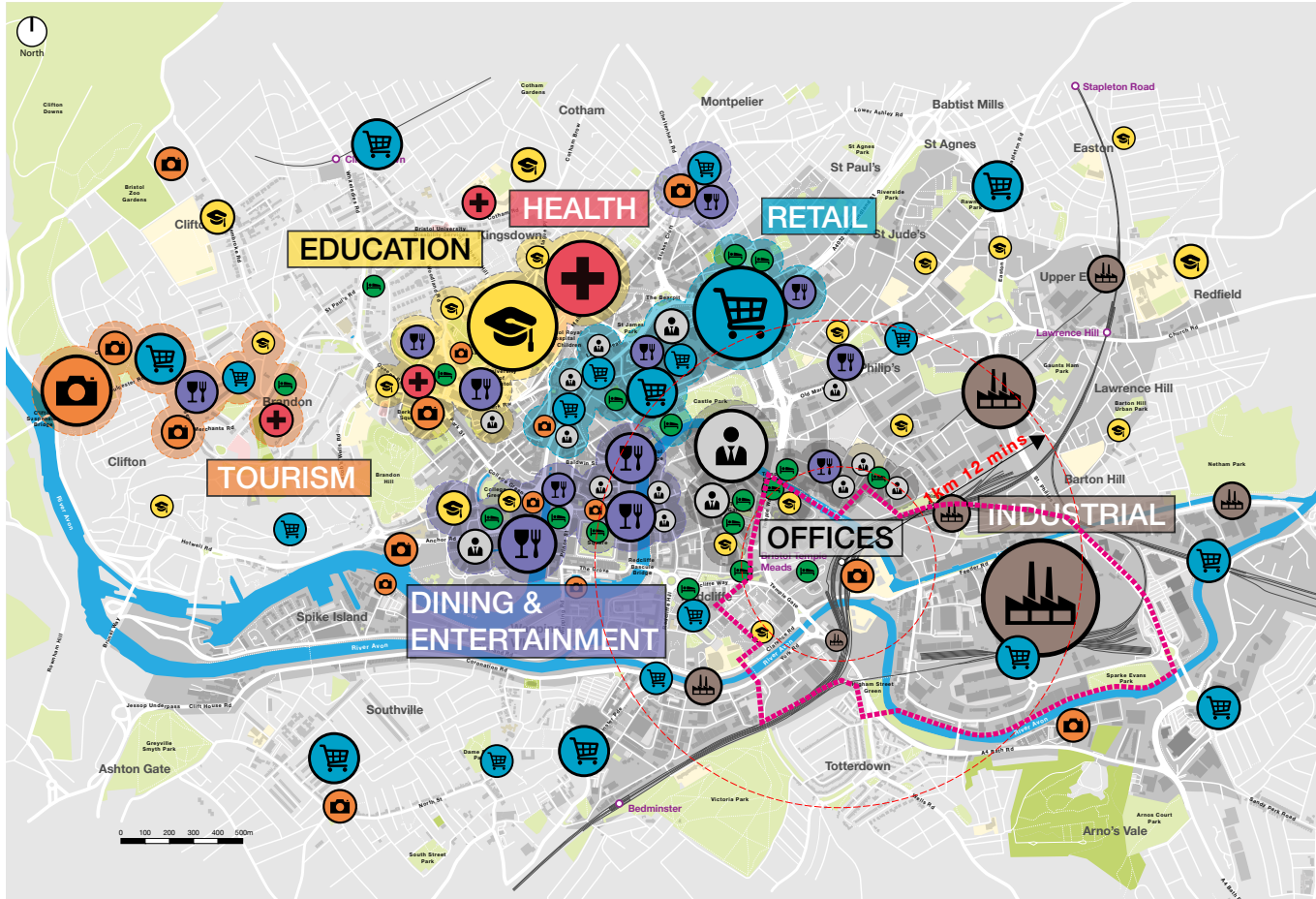
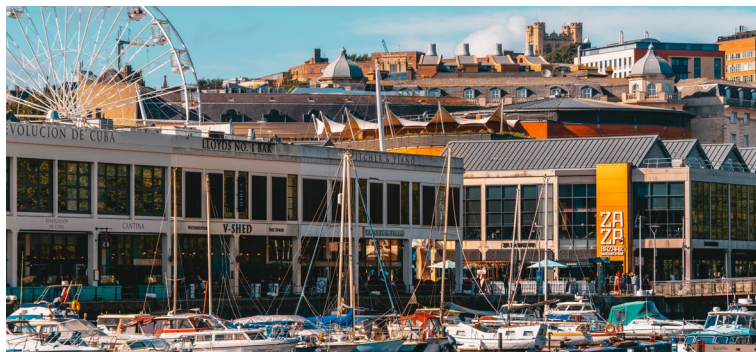


Figure 4 Bristol poly-centric city



Independent and Creative

Bristol is also characterised by flourishing independent businesses and a vibrant creative arts and theatre scene. Wapping Wharf is a prime example of a thriving retail area driving footfall which has made national news by only letting to small, independent companies. The success of independent retail, restaurant and studio space is also demonstrated by the Cargo Scheme and Engine Shed developments.

The balance of high-quality independent retail and restaurants, access to urban green space, a varied supply of housing and regional proximity to London via rail and road have resulted in Bristol's national prominence as a welcoming and aspirational city in which to live. This national reputation has put increased pressure on housing which has resulted in rising costs and in some cases increased displacement of established residents through gentrification.

An early vision workshop for this study brought together a range of stakeholders including representatives from across the client group and highlighted the following strengths of Bristol all of which touch upon the independent and creative spirit of the city: 'Great arts scene', 'Independent Traders', 'Artists and Street Art', 'Independent Businesses' 'Sense of Independence'. There is clearly a strong sense of identity for Bristol as a hub of supporting local and creative enterprise which many feel is a strength of the city.

Bristol's creative spirit also supports technological innovation through such incubator spaces as the Engine Shed and partnerships with the University of Bristol which demonstrate that the city provides an attractive base for professionals across the creative classes and supports innovation in all its guises.

Celebrations and Community

Bristol hosts a series of festivals and events throughout the year which draw in local, national and international audiences and showcase the city's diverse sources of pride. From the annual Balloon Fiesta, music festivals, weekly street food markets, St. Paul's Carnival, art installations, film festivals to the city's ever-evolving street art portfolio; Bristol hums with the energy of celebration.

As a poly-centric place, Bristol is home to a strong sense of community spirit, both based upon individual neighbourhoods and upon the city's ability to bring these communities together. This community spirit is difficult to quantify yet was a strong theme of early visioning where it was mentioned as a key quality of Bristol by every group which participated. This sense of belonging and engagement is the product of the complex context in which the city operates and the communities which have grown organically over time. This sense of community has also garnered praise in the national media as Bristol has been named one of the most attractive places to live.

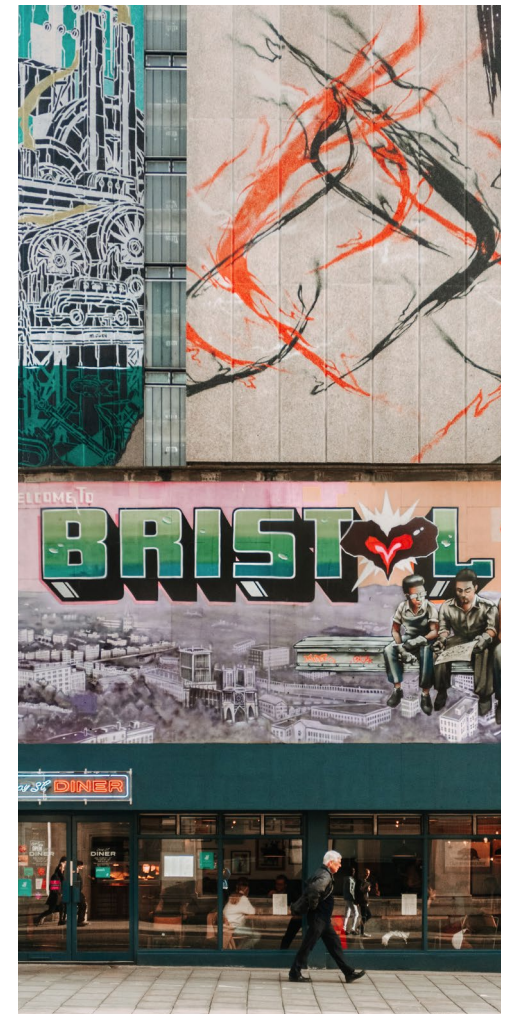




Figure 5 Bristol poly-centric city – different ages and styles of housing and public realm

2.2 Strategic context

2.2.1 Bristol One City Plan

As an overarching vision for its future, Bristol has developed the One City Plan (2020). The One City Plan identifies a shared City Vision: *“In 2050 Bristol will be a fair, healthy and sustainable city. A city of hope and aspiration, where everyone can share in its success.”* The document sets out a vision for the future of Bristol, decade by decade up to 2050 and takes a thematic approach based around:

- Connectivity
- Economy
- Environment
- Health & Wellbeing
- Homes and Communities
- Learning and Skills.

The One City Approach is about: *“working with the collective intelligence of many stakeholders and for those organisations to recognise that their future prosperity cannot be secured merely through what happens within their boundaries. The city context in which they operate is key”.*

2.2.2 Climate and Ecological Emergency

On 13th November 2018 Bristol City Council councillors passed a motion calling on the Mayor to declare a ‘Climate Emergency’. This included:

1. A pledge to make the city of Bristol carbon neutral by 2030, taking into account both production and consumption emissions (scope 1, 2 and 3)
2. Call on Westminster to provide the powers and resources to make the 2030 target possible

3. Work with other governments (both within the UK and internationally) to determine and implement best practice methods to limit Global Warming to less than 1.5°C
4. Continue to work with partners across the city and region to deliver this new goal through all relevant strategies and plans
5. Report to Full Council within six months with the actions the Mayor/Council will take to address this emergency

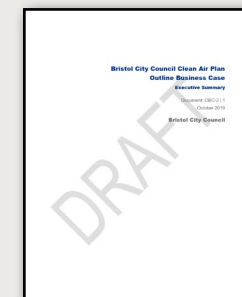
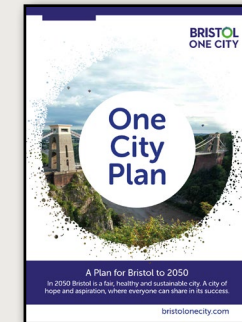
This was followed by similar declarations by the UK parliament on 1st May 2019 and the West of England Combined Authority on 19th July 2019.

On 4th February 2020 Bristol declared an Ecological Emergency in response to escalating threats to wildlife and ecosystems.

These declarations are a recognition of the urgency of the climate crisis and ecological crisis. The full implications of this political and social shift are not yet known. However, they signal a direction of travel that the threats posed by global heating and the destruction of the natural world deserve greater weight in decision-making, and that accelerated changes to the status quo are both necessary and desirable.

In response to Bristol's declarations, new governance structures have been created and publications released. A Climate Emergency Action plan was released in July 2019. In February 2020 the One City Climate Strategy was released which identified ten key areas where climate action is needed.

Work is continuing to determine what actions and policies are required to achieve net zero emissions within the devolved



powers and mechanisms available. In December 2019 the Centre for Sustainable Energy published a report to Bristol City Council of analysis of how the city can achieve net zero greenhouse gas emissions (scopes 1 and 2) by 2030. This included ten key interventions on topics such as securing new powers, investment in transport modal shift and city-wide programmes such as district heating. Over the course of this Development Framework, it is reasonable to assume that policy will be strengthened and formal targets will be adopted for key sectors, with a potential shortfall being offset through carbon-negative initiatives.

2.2.3 Traffic Clean Air Zone

In Summer 2019, Bristol City Council held a consultation for a Clean Air Zone (CAZ) in Bristol. This found that there is a high level of concern about the health impacts of poor air quality. As with other major UK cities, pollution from traffic is a serious problem in Bristol. The Council's Corporate Strategy outlines a vision for Bristol that includes leading the way in tackling the impacts of air pollution. The central areas of the city and the main arterial routes have been identified as being in breach of levels set by the UK and the EU for NO₂.

Bristol's CAZ will come into effect in November 2022 and will add a daily fee to vehicles that do not comply with standards set out by the UK Government. The revenue from the CAZ will be used to encourage sustainable modes of travel within ongoing work, communities, and businesses.

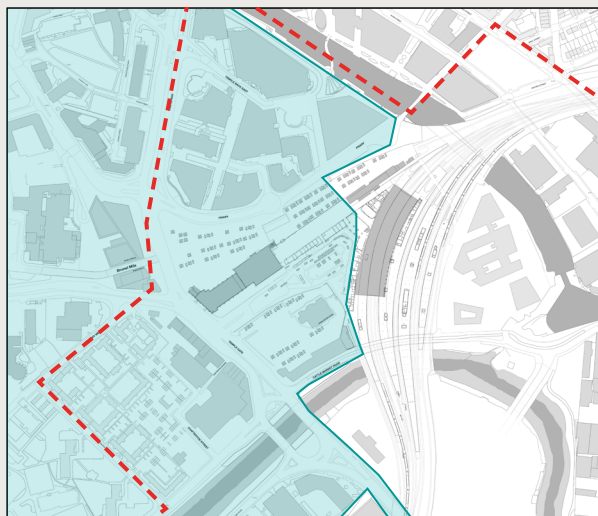


Figure 6 Bristol Clean Air Zone

2.2.4 West of England Local Industrial Strategy

The West of England Local Industrial Strategy was published in July 2019 and identifies the region's strengths and challenges. The Strategy supports the national Industrial Strategy and is focused on ensuring that actions in the West of England support sustainable, clean economic growth and tackle climate change. Four main priorities have been identified as being key to the West of England's economy, these are:

- Fostering cross-sectoral innovation from research through to commercialisation
- Ensuring that growth is inclusive, with a focus on

opportunities for employment and progression for all

- Addressing the productivity challenge, including adopting new technology and management practices and supporting businesses to trade
- Capitalising on the region's innovative strengths to deliver the infrastructure necessary for future growth

2.2.5 Other policies

There are several emerging and recently adopted policy and strategic documents which will influence and direct future plans for this area, these include:

- West of England Local Cycling and Walking Infrastructure Plan – adopted
- West of England Bus Strategy – adopted
- Bristol Parking Strategy - emerging
- Bristol Walking Strategy - emerging
- Bristol Freight Strategy - emerging
- Transport Development Management Guide - released
- West of England Mass Transit Feasibility Study - emerging
- Bristol Avon Flood Strategy - draft consultation document released October 2020

2.3 Planning and transport policy

2.3.1 National Planning Policy Framework

The National Planning Policy Framework (NPPF) (2021) sets out the Government's planning policies for England and how these should be applied. The NPPF must be taken into account in preparing development plans and it is a material consideration in making planning decisions. At the heart of the NPPF is a presumption in favour of sustainable development (NPPF, paragraph 11). NPPF sets out three mutually supportive objectives for achieving sustainable development in the planning system:

- **An economic objective** – to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure
- **A social objective** – to support strong, vibrant and healthy communities, by ensuring that a sufficient number and range of homes can be provided to meet the needs of present and future generations; and by fostering a well-designed and safe built environment, with accessible services and open spaces that reflect current and future needs and support communities' health, social and cultural well-being
- **An environmental objective** – to contribute to protecting and enhancing our natural, built and historic environment; including making effective use of land, helping to improve biodiversity, using natural resources prudently, minimising waste and pollution, and mitigating and adapting to climate change, including moving to a low carbon economy

2.3.2 National Design Guide

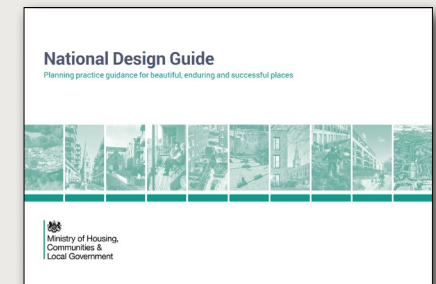
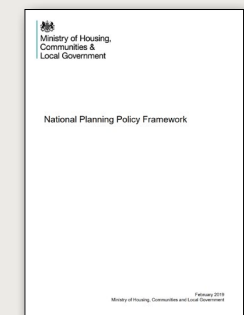
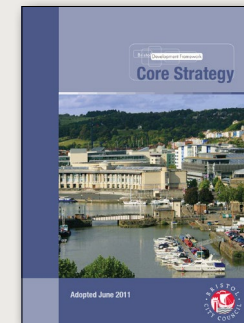
The National Design Guide was published in October 2019 and forms part of the government's Planning Practice Guidance. It sets out the characteristics of well-designed places and provides guidance on what good design means in practice. The Guide considers that well designed places have individual characteristics which work together to create its physical character and the characteristics help to nurture and sustain a sense of community, which work to positively address environmental issues affecting climate. The ten characteristics are:

- Context – enhances the surroundings
- Identity – attractive and distinctive
- Built form – a coherent pattern of development.
- Movement – accessible and easy to move around.
- Nature – enhanced and optimised
- Public spaces – safe, social and inclusive
- Uses – mixed and integrated
- Homes and buildings - functional, healthy and sustainable
- Resources – efficient and resilient
- Lifespan – made to last

2.3.3 Bristol Local Plan

The statutory development plan (also known as the Bristol Local Plan), is made up of the following adopted documents:

- The Joint Waste Core Strategy (March 2011)
- The Bristol Core Strategy (June 2011)
- The Site Allocations and Development Management Policies Local Plan (July 2014)
- The Bristol Central Area Plan (March 2015)



The Core Strategy was adopted in 2011 and sets out a spatial vision and delivery strategy up to 2026. It is currently under review and will be replaced by the new Bristol Local Plan. Policy BCS2 sets out the development that is to be delivered within the area defined as “Bristol City Centre”. Development up to 2026 in this area will include around 150,000m² of net additional high-quality office floorspace; the provision of around 7,400 new homes; and improved transport systems and connectivity, including new public transport, pedestrian and cycling routes and transport hubs. The policy states that continued improvement will be promoted in regeneration areas including Redcliffe and at city centre gateways including Temple Meads.

DM13 of the Site Allocations and Development Management Policies Local Plan sets out the strategy for delivering a thriving economy in Bristol. The policy states that principal industrial and warehousing areas will be identified and retained for industrial and warehousing uses. The majority of the St Philip's Marsh area is designated as safeguarded industrial land by policy DM13.

The Site Allocation and Development Management Policies Local Plan supports the delivery of the Core Strategy. It provides specific development management policies, designations and site allocations.

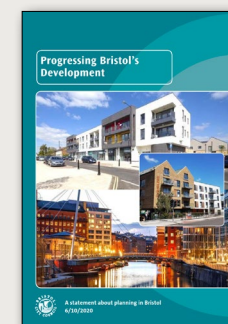
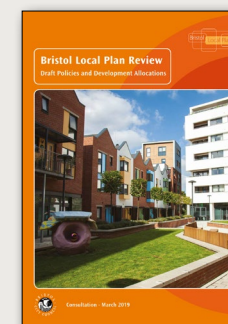
The Central Area Plan explores how Bristol City Centre will develop over the next 15 years to 2026 and also sets out development management policies, designations and site allocations. Policy BCAP6 allows for at least 100,000m² of

net additional high-quality office and flexible workspace within Bristol Temple Quarter. Policy BCAP35 sets out the development that is to be delivered within the Bristol Temple Quarter and states sites will be developed for a wide range of uses, as part of the growth and regeneration of the area as an ‘employment-led, mixed-use quarter of the city centre, an exemplar for new initiatives and a hub for all creative minded businesses’. Bristol Temple Meads Station will be enhanced as a major transport interchange.

2.3.4 Bristol Local Plan Review

Bristol City Council is currently reviewing the Local Plan. Once adopted, the emerging Bristol Local Plan will replace the adopted Bristol Local Plan as the overarching development plan for the City of Bristol. An initial consultation on the Local Plan review ran until 24th May 2019, with further consultation in November 2022. The development strategy for Central Bristol includes the delivery of at least 11,500 new homes within the plan period, with scope for significantly greater numbers where further interventions and delivery of infrastructure can unlock more potential.

Draft Policy DS1 states that a sustainable and flourishing new urban quarter will be developed at Bristol Temple Quarter, centred on an improved 21st century transport hub at Temple Meads. Growth and regeneration at St Philip's Marsh for mixed uses including workspace and provision of new homes in a regenerated city quarter which complements the adjacent Bristol Temple Quarter. Draft Policy DS3 states that St Philip's Marsh will include mixed



uses including the provision new homes in a regenerated city quarter which complements the adjacent Bristol Temple Quarter. Development will ensure the retention, refurbishment, intensification and/or redevelopment and innovative reincorporation of workspace to ensure that the number of jobs supported by the area is increased and that the diversity of business and economic development is maintained and enhanced.

Draft Policy E2 sets out the employment land strategy and identifies that development of workspace at a number of key locations including Bristol City Centre (Draft Policy DS1 'Bristol City Centre'); Bristol Temple Quarter & St Philip's Marsh (Draft Policies DS2 'Bristol Temple Quarter' and DS3 'St Philip's Marsh'), will ensure the continued economic growth of Bristol.

The emerging proposals for the revised Local Plan are designed to ensure that future development contributes to Bristol's goals of being carbon neutral, climate resilient and wildlife-rich city by 2030.

2.3.5 Progressing Bristol's Development

Based on the draft Local Plan and supporting the One City Plan, 'Progressing Bristol's Development' is a guidance document setting out the approach to development in the city following the impacts of COVID-19. It explains how planning decisions will be balanced against existing Local Plan policies together with emerging plans, new evidence, changes to national planning policy and evolving development issues across the city. This statement was approved by Bristol City Council on 6th October 2020.

2.3.6 Supplementary Planning Documents (SPDs)

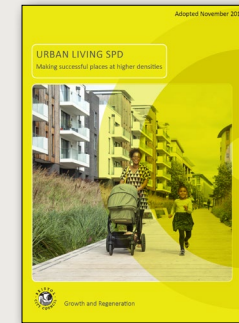
SPDs add further guidance to the policies contained within the Bristol Local Plan. Once adopted, SPDs are a material consideration in the determination of planning applications.

Urban Living SPD

The Urban Living SPD (adopted November 2018) adds additional guidance to the policies contained within the Bristol Local Plan and provides guidance on best practice in relation to urban design and public realm. The SPD considers the need to optimise densities while also raising design quality in new development, depending on the setting. Part of the area is within the 'city centre' area where the optimal density is defined as 200 units/ha and other parts are within the 'inner urban area', where a lower optimal density is defined as 120 units/ha.

Future of Redcliffe SPD

Part of the Development Framework area is covered by this SPD. The SPD sets out a vision and identifies objectives, which set out the guiding principles for future development in Redcliffe.



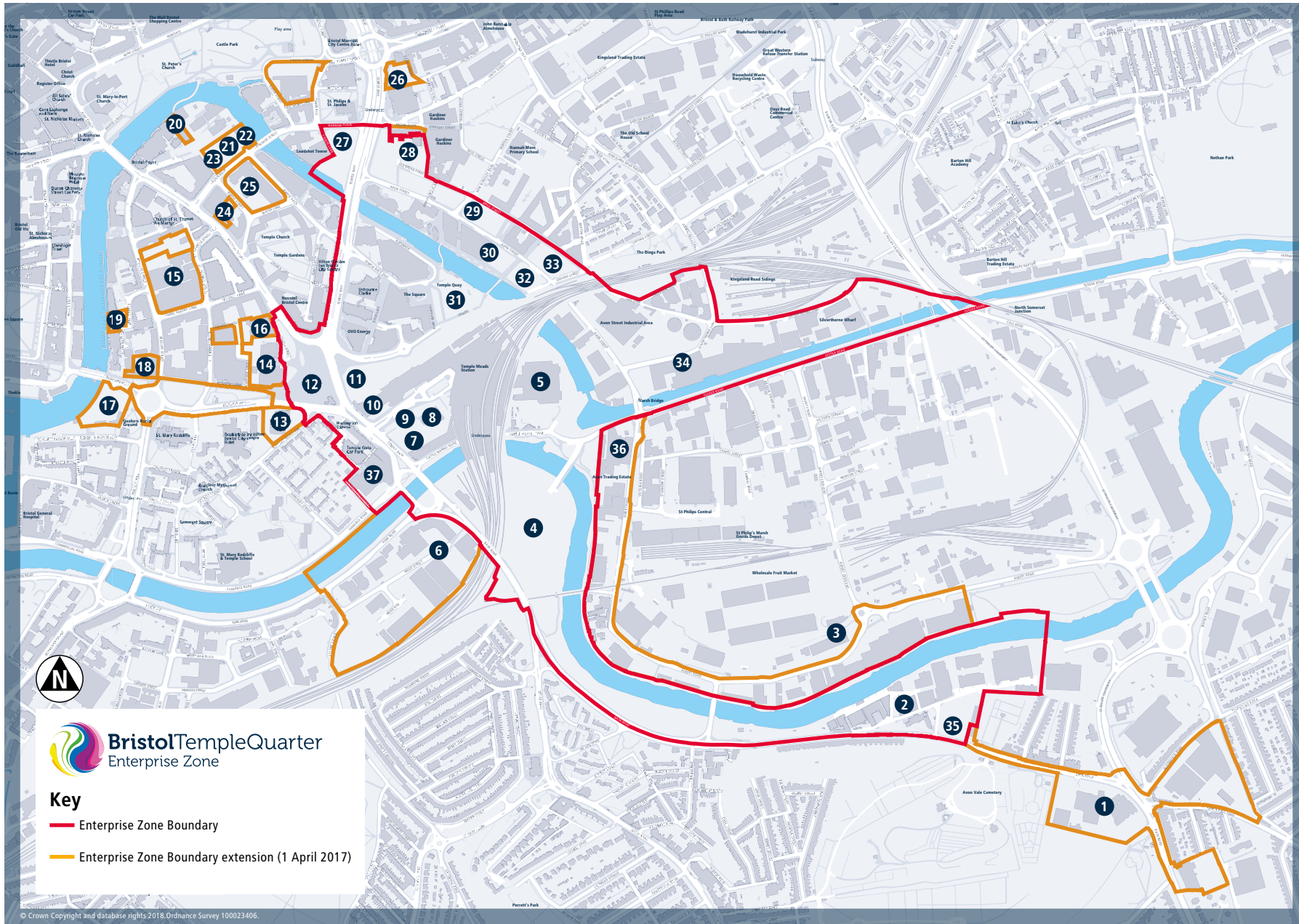


Figure 7 Bristol Temple Quarter Enterprise Zone map, 2022 © Bristol City Council

Enterprise Zone sites

- | | | |
|--|---|---|
| <p>1 Bath Road Studios
Managed vibrant and contemporary workspace with offices ranging from 100 sq ft up to 5,500 sq ft. Houses ITV's Bristol studio. www.bathroadstudios.co.uk</p> | <p>10 Engine Shed
An enterprise hub providing workspace for a range of high-tech, creative and low carbon businesses, including Bristol SETSquared, the University of Bristol's award-winning high-tech business incubator. www.engine-shed.co.uk</p> | <p>18 Freshford House
Ready to occupy offices ranging from 3,936 to 30,120 sq ft.</p> |
| <p>2 Paintworks
A mixed use development aimed at creative people and companies. Construction of additional live and work space is currently underway. www.paintworksbristol.co.uk</p> | <p>11 Mead Street
A Mead Street Development Brief has been prepared to guide future development of the area to create a flourishing urban neighbourhood with a mix of new homes and workspaces, including new green space and sustainable travel connections. A 221 unit residential scheme at the former Bart Spices site currently has a resolution to grant, subject to a Section 106 agreement. www.bristoltemplequarter.com/wp-content/uploads/pdf/Mead-Street-Development-Brief_FINAL.pdf</p> | <p>19 Huller and Cheese
Retail units on the ground floor of a modern housing development.</p> |
| <p>3 Albert Road industrial units
A range of industrial units with varying levels of vacancy.</p> | <p>12 Temple Square
Proposals for office space including the refurbishment of the George and Railway and demolition of the Grosvenor Hotel.</p> | <p>20 Fermentation Buildings Finzel's Reach
Boutique live/work units of 1,000 to 15,000 sq ft. These units will be the focal point of the office, restaurant, retail and leisure space within Finzel's Reach. www.finzelsreach.com</p> |
| <p>4 Temple Island
Enabling works are currently being undertaken on site and future proposals will likely include office space, residential units, a conference centre and hotel.</p> | <p>13 Temple Point
Existing Grade A office accommodation over five floors.</p> | <p>21 Aurora Finzel's Reach
95,531 sq ft of Grade A BREEM Excellent office space across seven floors. www.aurora-bristol.com</p> |
| <p>5 Temple Quarter Campus
A new £300m University of Bristol campus that will include a Digital Innovation Hub, a business school and a student residential village. Due to open in 2026 www.bristoltemplequarter.com/temple-quarter-campus/</p> | <p>14 100 Temple Street
Bristol City Council offices. Redevelopment of the land to the rear of the building is nearing completion and will provide approximately 50,000 sq ft of new office space</p> | <p>22 Generator Building Finzel's Reach
27,000 sq ft of office accommodation over six floors. www.finzelsreach.com</p> |
| <p>6 Temple Gate industrial estate
Currently occupied by a range of businesses, including Honda, Fowler's Motorcycles and trampoline park Freedog.</p> | <p>15 Redcliffe Quarter
2.5 acre mixed use development under construction. It will include restaurants, student accommodation, offices and apartments. www.redcliffquarter.com</p> | <p>23 Premier Inn Finzel's Reach
168 bed Premier Inn Hotel, completed and in operation.</p> |
| <p>7 Temple Studios
40,000 sq ft of managed workspace for the creative and digital industries. Managed by TCN UK. www.templestudiosbristol.co.uk</p> | <p>16 EQ
Development of a 200,000 sq ft of grade A office space over 8 storeys is nearing completion. https://eqbristol.co.uk</p> | <p>24 Canningford House
Premises offering 1,775 to 13,011 sq ft of office space.</p> |
| <p>8 Bristol and Exeter House
16,000 sq ft Grade II listed building offering creative boutique offices to a mix of start-ups and entrepreneurial companies. Managed by TCN UK. www.bristolsexeterhouse.co.uk</p> | <p>17 Redcliffe Wharf
Planning approval for a mixed use development to include residential, office, workspace and retail space. www.redcliffwharf-bristol.com</p> | <p>25 Old Fire Station
Mixed use development to include offices, 318 residential units and amenity space currently under construction.</p> |
| <p>9 Temple Gate North
Vacant plot due with potential for residential or office use in the future.</p> | | <p>26 Land adjacent to 1 Temple Way
Redevelopment for student housing and commercial space has been completed and is now occupied.</p> |
| | | <p>27 Assembly Bristol
Development for around 30,000 sq ft of commercial space currently under construction. www.assemblybristol.com</p> |
| | | <p>28 Glassfields
Development underway for a major mixed use scheme to include a hotel and extensive open place business accommodation set around a landscaped square. www.glassfields.com</p> |
| | | <p>29 ND7
Build to Build to rent scheme for 255 units recently completed.</p> |
| | | <p>30 1 and 2 Glass Wharf
Two six storey Grade A, fully built office developments. 1 Glass Wharf is Burges Salmon's headquarters, whilst 2 Glass Wharf houses PwC and a number of other occupiers. www.2glasswharf.com</p> |
| | | <p>31 Plot 3
Current proposals for the site include a Build to Rent scheme, aparthotel and hotel with a central open space.</p> |
| | | <p>32 3 Glass Wharf
7 storey office building recently completed and occupied by HMRC. www.3glasswharf.com</p> |
| | | <p>33 ND9
Development underway for a 7 storey office building.</p> |
| | | <p>34 Silverthorne Lane
Planning approval for a major mixed use development including residential, commercial space, student accommodation and a new secondary school.</p> |
| | | <p>35 345 Bath Road
Planning approval for 109 residential units with commercial and retail space.</p> |
| | | <p>36 10 Feeder Road
Planning approval for student accommodation, flexible commercial space and incubator space.</p> |
| | | <p>37 Former Peugeot Garage and Victoria House
Proposals for 400 residential units with commercial space at ground floor.</p> |

Figure 8 Bristol Temple Quarter Enterprise Zone map key sites, 2022 © Bristol City Council

2.3.7 Bristol Temple Quarter Enterprise Zone

The Bristol Temple Quarter Enterprise Zone (BTQEZ) is a 70-hectare site that was officially designated as an Enterprise Zone in April 2012. The BTQEZ was extended to cover an additional 30 hectares in April 2017. The BTQEZ area has been subject to considerable change and has seen some particularly major changes recently. There has been a shift in the centre of the business district to the west and north-west of Temple Meads station. The decision by the University of Bristol to develop the new campus heralds a further eastwards shift in new development, with the recent demolition of the former Post Office Sorting Office building signifying progress. There has also been a re-modelling of the road system outside of Temple Meads station, which is recently completed.

BTQEZ developer benefits

Businesses working within the BTQEZ and developers looking for new sites can benefit from incentives including business rates and simplified planning. The BTQEZ offers simplified local authority planning through means such as Local Development Orders that grant automatic planning permission for certain developments.

BTQEZ key sites

The Enterprise Zone boundary is shown in Figure 77, including its extension in April 2017, and some key sites in Figure 88.

Spatial Framework

The BTQEZ Spatial Framework is a non-statutory planning document published in October 2016, which sets out

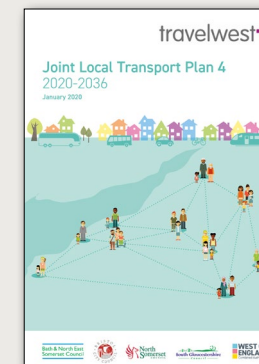
how the Temple Quarter Enterprise Zone could become a thriving new city quarter over the next 25 years. It sets out how key urban design principles for the urban quarter should be incorporated into new development. Whilst not a statutory document, it is a material consideration in Bristol City Council's determination of planning applications in the EZ area. Parameters for development forms and heights, land uses and development quantum are proposed.

The Spatial Framework is intended to be read alongside two companion documents: the Sustainable Urban Mobility Plan and the Public Realm Guide.

The BTQEZ Spatial Framework will remain a relevant guidance document. Where there is divergence between the Spatial Framework and this new Development Framework, this more recent document will take precedence.

2.3.8 Joint Local Transport Plan 4

The Joint Local Transport Plan 4 (JLTP4) has been prepared by the West of England Combined Authority, working with Bath & North East Somerset, Bristol, North Somerset and South Gloucestershire councils. It was published in January 2020 and sets out the vision for transport up to 2036. JLTP4 aims to achieve a well connected sustainable transport network that works for residents across the region; a network that offers greater, realistic travel choices and makes walking, cycling and public transport the natural way to travel.



JLTP4 aims to ensure that transport in the region is carbon neutral by 2030. To do this JLTP4 recognises that a substantial shift towards cleaner and greener and more sustainable forms of transport is required. Five objectives have been identified, as follows:

- Take action against climate change and address poor air quality
- Support sustainable and inclusive economic growth
- Enable equality and improve accessibility
- Contribute to better health, wellbeing, safety and security
- Create better places

2.3.9 Bristol Transport Strategy

Bristol Transport Strategy was adopted by Bristol City Council in July 2019. It fills a policy gap between the regional JLTP and specific mode, topic or area based strategies and plans.

The overall objectives of the strategy are as follows:

- Provide transport improvements to accommodate increased demand from growth in housing, jobs & regeneration on an already congested network with complex movements from within and outside the city boundary
- Enable equality within an inclusive transport system that provides realistic transport options for all
- Create healthy places, promoting active transport, improving air quality, and implementing a safe systems approach to road safety

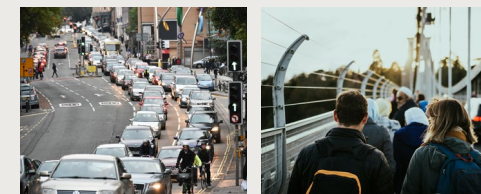
- Create better places that make better use of our streets and enable point to point journeys to be made efficiently
- Enable reliable journeys by minimising the negative impacts of congestion and increasing network efficiency and resilience
- Support sustainable growth by enabling efficient movement of people and goods, reducing carbon emissions and embracing new technologies

The Strategy seeks to deliver and enable measures for new developments that are permeable and accessible to all users, including developments that are accessible by safe and attractive cycling infrastructure.

The Strategy also aspires to deliver and enable the design and development of communities that promote sustainable and healthy transport, supported by high housing densities, with the highest densities around public transport facilities.

2.3.10 Other policy

The above list of strategic and local planning policy is representative, not exhaustive. Additional policy and strategic publications are referenced in Appendix A.



2.4 Proposed development context

2.4.1 Key development schemes

Temple Quarter Enterprise Campus

The Temple Quarter Enterprise Campus (TQEC) is one of the major development schemes currently underway within the Bristol Temple Quarter. The TQEC site is comprised of land at the former Post Office Depot site and some at Temple Island. It is envisaged that the new campus will help to regenerate the surrounding area and benefit the whole city. The sites will be developed to provide a mix of flexible research and teaching facilities, accommodation for up to 1,500 students and a range of commercial outlets.

The land at the former Post Office Depot was purchased by University of Bristol in 2017 from Bristol City Council (who had previously purchased the site in 2015). The former Post Office Depot was a major structure upon the site and was considered to be an eyesore for those entering Bristol by rail. Demolition of the building took place in 2019 and an outline planning application for a mixed-use University campus comprising of up to 82,395m² of floor space, including up to 1,500 student bed spaces was approved in June 2019 (application reference 17/06459/P). Reserved matters applications have subsequently been approved.

Silverthorne Lane

In August 2019, a hybrid planning application was submitted for a major mixed use development on a 4ha industrial site to the north of the Feeder canal and south of Silverthorne Lane (19/03867/P). The site is within the Bristol Temple Quarter Enterprise Zone. The application proposes site wide remediation, including demolition and the key components comprise up to 23,543 m² of

floor space to include offices, research and development and non-residential institution and the erection 367 dwellings. Redevelopment of 'The Erecting Sheds' is also proposed to provide offices and the redevelopment of 'The Boiler Shop' to provide a 1,600 pupil secondary school; in addition to the erection of buildings to provide up to 841 student units. The application was granted consent by Minister of State for Housing, Stuart Andrew MP, on behalf of the Secretary of State in April 2022.

Temple Island

Temple Island is currently vacant and is owned by Bristol City Council, and subject to disposal agreements. Legal & General will progress the development of this site. Plans outlined at Bristol City Council's cabinet meeting on 4th February 2020, showed the scheme content including:

- Up to 500 homes to rent and buy, with a target of 40% affordable homes so more local people can live in the heart of the city
- A state-of-the-art conference centre
- A 350-bed hotel with potential for a roof top sky bar with views across the city
- High standard office space to support the demand from local businesses and businesses looking to establish themselves in Bristol
- New public spaces, shops and restaurants creating a new city centre area where people can socialise and relax
- Easy connections to Temple Meads, the University of Bristol Enterprise Campus, neighbouring communities and the local transport network.

This development has not yet been submitted for planning permission. Temple Island is currently undergoing enabling works to prepare the site for development.

Floating Harbour Walkway

This proposed development is a new floating pontoon walkway along the southern bank of the Floating Harbour, to provide shared pedestrian and cycle way between Temple Meads ferry landing and Cattle Market Road. This proposal was granted listed building consent and full planning permission in October 2019 (19/01051/LA and 19/01050/F, respectively).

Temple Square

This development is adjacent to the Development Framework area at Temple Circus. A hybrid planning application (part outline/part full) for the redevelopment of the site was submitted in 2016 (16/06828/P). The proposed development includes the part demolition, extension and change of use of the former Grade II Listed George and Railway Hotel. The application also seeks outline consent for the northern plot (known as Temple Square). The proposal is for an office based development (totalling over 32,000 square metres of offices), with other commercial, town centre type uses on the lower levels. The Council has approved a resolution to grant planning consent pending the signing of a S106 agreement.

Temple Gate Highway Scheme

The Temple Gate Highway Scheme was a major reconfiguration scheme to remove the Temple Circus roundabout and replace it with a simplified, signal-controlled junction. This scheme also included new bus stops and improvements to pedestrian and cycle routes in the area. Construction was completed in Winter 2019.

Plot 3

A new development is in early stages of design for Plot 3, owned by Homes England and part of the Temple Quay Estate. It is understood that plans are for a hotel, aparthotel and residential development, but this scheme has not yet been submitted for planning permission.

Bristol Temple Meads Eastern Entrance

The provision of a new Eastern Entrance was originally conceived as part of the masterplan but is now being progressed by Network Rail on behalf of the CA. The Eastern Entrance will provide gated entry between the University of Bristol Temple Quarter Enterprise Campus and Temple Meads station by creating an opening at the end of the Passenger Subway. This development is currently in GRIP 4 stage of design.

4 Glass Wharf, ND9 (Avon Street)

Planning permission for a 7-storey office building, providing approximately 19,500sqm office floorspace, over a mixed use ground floor was approved at 4 Glass Wharf in January 2018. The site forms part of a Masterplan area for which outline planning permission was previously granted for a mixed-use zone that includes residential, business, leisure, retail, financial/professional services and community uses.



Figure 9 Silverthorne Lane © [SquareBay](#)



Figure 10 Temple Quarter Enterprise Campus © Fielden Clegg Bradley Studios



Figure 11 Temple Quarter Enterprise Campus © [University of Bristol](#)



Figure 12 Temple Meads Eastern Entrance © [Network Rail](#)



Figure 13 Floating harbour walkway © [Bristol City Council](#)

Figure 14 Temple Quarter development context (April 2020)

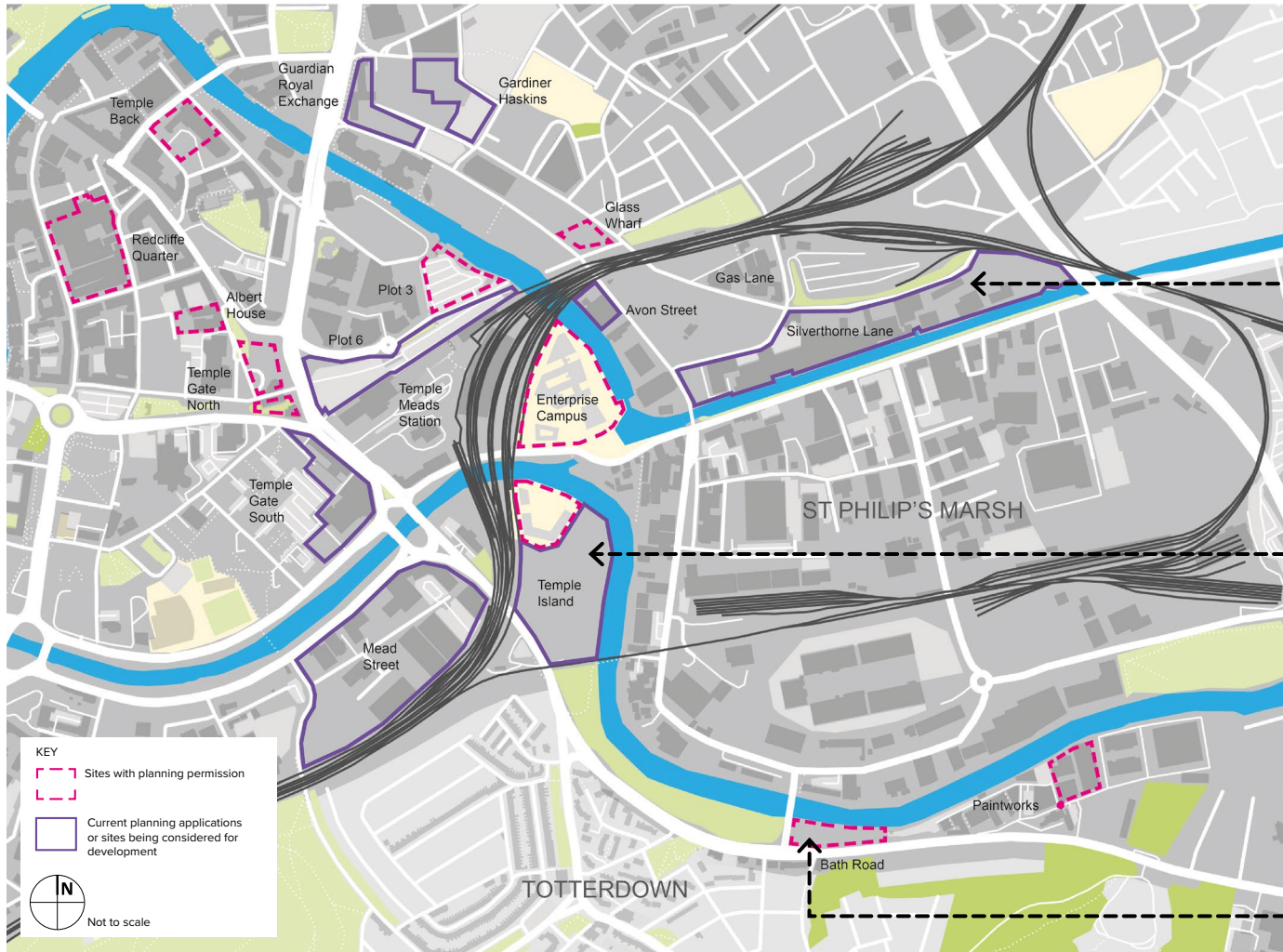


Figure 15 Silverthorne Lane © AWW



Figure 16 Temple Island © Legal & General



Figure 17 Totterdown Reach © Hadley Property Group

2.4.2 Market context

This market assessment was conducted between August 2019 and March 2020 by Avison Young, Turley, and Pragma. This was written before the COVID-19 pandemic, and market conditions have changed since.

Office market

The office market remains in a period of low supply and high demand leading to strong office rental value growth in the last 2 years. With the relaxation of the Government's Permitted Development rights, allowing the conversion of office buildings to residential use and the economic context of the time (low demand, high supply of office space), Bristol saw a significant amount of secondary and tertiary office space being converted into residential use. With increasing demand and a reduced supply of space in the city, competition has been fierce with rental value growth being the big benefactor.

Whilst a number of sites have obtained planning permission for office space over the last five years, recent development has been limited to just two schemes, with only Aurora at Finzels Reach being available in the open market. Due to the lack of quality space in the market, the property was 85% let before completion, demonstrating the level of demand for space in the city. This low level of new space has put further pressure on existing space.

There is a strong level of demand for office space up to 20,000 sq ft and also demand from companies looking for larger space. New floor space could be flexible to accommodate not only the larger requirements, but where a single occupier is not available, allowing the ability to subdivide.

The emergence of serviced offices and co-working continues to impact the city centre market. The demand for flexible space, both in terms of size and term has impacted on the more traditional office space market by reducing lease lengths and rent free periods.

Demand for parking spaces in city centre offices has reduced when compared to 10 years ago, however the current market still expects a limited number of spaces on site, with recent planning permissions demonstrating a continued provision of spaces

Residential market

Bristol's housing market has seen significant growth in recent years, with high demand and low supply providing a tight property market.

Virtually all of the new-build apartment schemes in the city centre are private rented sector (PRS) or build to rent (BtR) schemes, forward funded and/or purchased by investment companies. PRS investors tend to look for locations with a strong employment context, good transport connections and healthy student retention as the product that is usually (but not exclusively) provided is one of quality professional management, sometimes with additional services. Bristol is therefore a popular location for investors and there are opportunities for future growth in PRS in Bristol city centre and more peripheral areas.

From a developer's perspective, the sale of a site to an investor is a lower-risk disposal strategy allowing the sale of the asset early, as soon as completion is achieved, instead of a relatively unknown rate of sale on completion. This is especially prudent when considering

the form of development, as macroeconomic factors can change significantly in the years from inception to scheme completion. In addition, there are funding implications on holding a scheme during the sales period as the finance costs over a long sales term may be expensive.

Due to the influx of PRS schemes in Bristol, the only new-build units currently available are at Acorn's Brandon Yard scheme on Anchor Road, overlooking the river and SS Great Britain, and City & Country's The General on Spike Island, some overlooking the water, making both schemes generally unrepresentative of general property in the city.

Based on a review of residential property transactions in the 6 months to June 2019 within a 1 mile radius of Bristol Temple Meads, information from Paintworks (Bath Road) and The Milliners (Victoria Street) sales in 2018 and the shortage of new-build property in Bristol, it is anticipated that values will be the region of £450 - £500 per sq ft in the Bristol Temple Quarter area.

One area of growth in the housing market is the emergence of Housing Associations, both for lower and higher density schemes. Schemes can be delivered with mixes of open market sales, affordable housing, additional grant-funded affordable housing or open market PRS rented units.

The bulk sale of units to Housing Associations (using grant funding) or PRS/BtR investors is one solution to the swift disposal of residential units, however, there is likely to be demand from developers looking to deliver a 'for sale' product.

Retail market

Uncertainty continues to rule the retail market with a number of high-profile and well-known companies either going into administration or seeking Company Voluntary Arrangements (CVAs) to reduce their rent costs. Bristol is no different in this uncertainty picture with the flagship Cabot Circus shopping centre seeing a number of changes, with Arcadia Group pulling out Topshop, Burton and Miss Selfridge from the centre. Despite this, Cabot Circus continues to be popular and recent new leases continue to be signed.

This uncertainty is perhaps mainly the result of the country's changing shopping habits, with the online share of UK retailing forecast to increase to 18.5% by 2022 (Ellandi, Retail 2018 report), however the rate of this growth is starting to slow.

Smaller and niche brands can be seen to be growing in strength. Wapping Wharf is a prime example of a thriving retail area driving footfall which has made national news by only letting to small, independent companies. Wapping Wharf's adjacent Cargo scheme has been equally successful with retail, restaurants, studios and bars all in converted shipping containers and Cargo 2 launched last year to cater to more small businesses. Finzels Reach is continuing this trend with their recently-opened Brewpub, operated by Bristol-based Left Handed Giant Brewery. To the west of Victoria Street, the second phase of Redcliffe Quarter has planning permission to develop a food hall as part of the mixed-use scheme with local Michelin-starred chef Josh Eggleton at the helm, again focussing on small, local food and drink companies.

The continued rise of food and beverage companies is a current trend of the high street with commentators pointing towards a shopping “experience”, i.e. shopping becoming more than just the purchase that can be achieved online and becoming the coffee/lunch/drinks, personal service received and experiences, either co-located in a shopping centre or across a city centre.

Development of new retail space in the city is low, generally limited to the commercial element of new residential schemes, such as Redcliffe Village’s second phase including a food hall and associated retail.

The most notable retail development is the granting of outline planning permission for the redevelopment of part of the Broadmead shopping centre in June 2018. The development will consist of 102,480 sqm (GEA) of high street retail.



Figure 18 Finzels Reach development © [Finzels Reach](#)

2.5 Development Framework strategic considerations

The purpose of this Development Framework is to present cohesive, deliverable plans for Bristol Temple Quarter & St Philip's Marsh. This section summarises the primary considerations from key topics that have informed this study and will continue to influence the next stages of design.

- Land use and ownership
- Housing
- Employment
- Retail
- Flood risk
- Heritage
- Movement and connectivity
- Parking
- Public realm and green infrastructure
- Diversity and inclusion
- Sustainable and inclusive growth
- Stakeholder engagement feedback
- COVID-19 impacts and considerations
- Potential meanwhile uses strategy

In addition, Appendix D contains a more detailed intermediate summary of employment, heritage and retail issues.

It is worth noting that there are many instances where these considerations overlap, and sometimes compete with each other. Thus, the role of the Development Framework is to achieve an appropriate balance and to make informed compromises where necessary. A summary of the main alignments and compromises between these is outlined in Section 2.6.

2.5.1 Land use and ownership

At present the Development Framework area is largely occupied by industrial and commercial land uses. However, the area sits between the residential areas of Totterdown, Redcliffe and Barton Hill and includes Sparke Evans Park, which is in need of enhancement. Whilst largely industrial, the area includes the Grade I Listed Bristol Temple Meads Station and together with listed structures along the Feeder Canal, these features contribute to the local character and sense of place, along with the semi-natural characteristics of the River Avon.

Land ownership within the Temple Quarter is highly fragmented. Public stakeholdings in the area consist of sites that are owned directly by Bristol City Council or by other government bodies such as Network Rail, Homes England, Utilities, Highways England and strategically aligned institutions like the University of Bristol. The majority of sites within the project area are smaller, privately owned lots.

Data was collected in 2020 and may not reflect current land ownership.

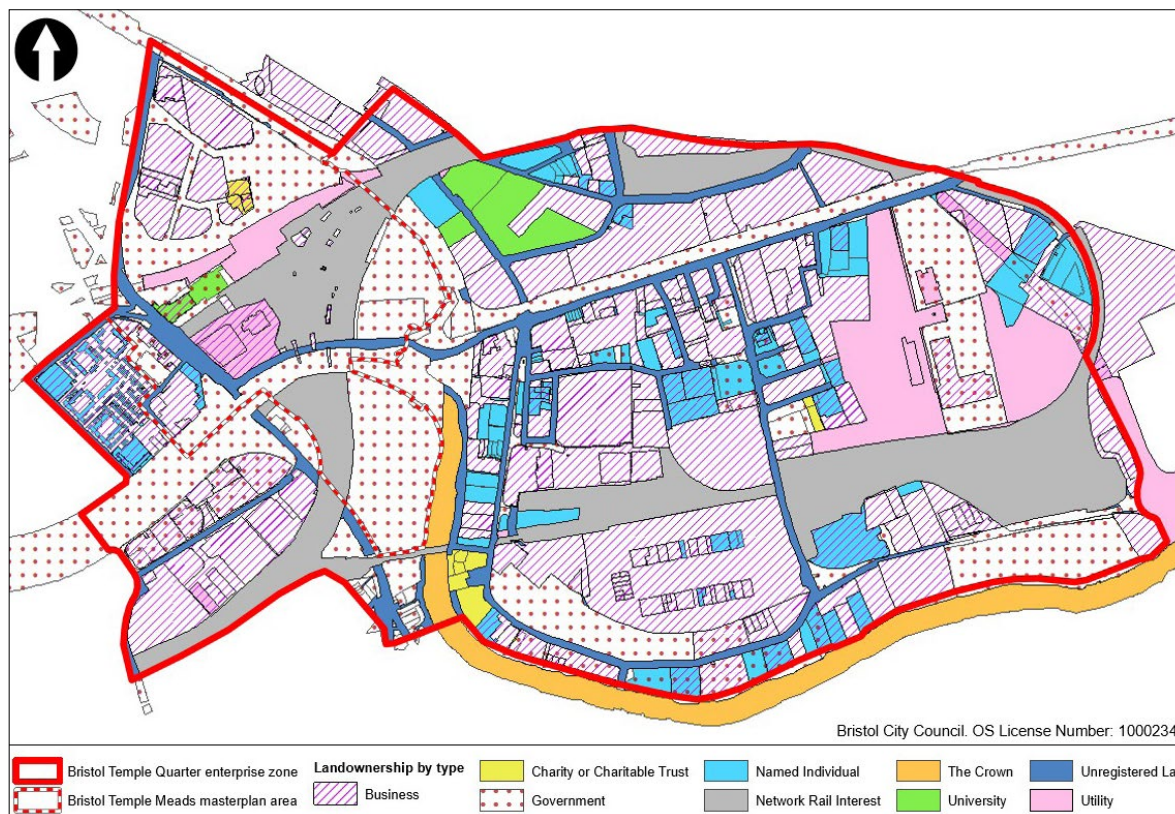


Figure 19 Land ownership (March 2020)

2.5.2 Housing

The homes we have

Over recent years, Bristol has played an integral role in providing new homes within the West of England housing market area. The city has accommodated around 45% of the new homes provided across the West of England since 2006.

The city centre has played an important role in accommodating this growth, providing around 7,600 new homes since 2006, representing an average of 630 homes per annum, and broadly equates to around 1/3 of overall supply in the city. Flats account for some 99% of this supply.

The housing stock in Bristol accommodates a population (472,400 in 2021) that is amongst the largest of all cities in Great Britain, reflecting its status as one of ten core cities. Population growth in Bristol has been unprecedented in the last two decades. Between 2011 to 2021, population growth increased by 10.3%, which notably surpasses the 6.3% growth seen across England and Wales. This has been particularly concentrated in central areas of Bristol.

The household profile of the central area of Bristol is dominated by single person or couple households, contrasting with other parts of the city where families live in larger households. Temple Quarter is adjacent to an area where larger households are prevalent, which is fairly uncommon in the central part of the city and has a role in potentially bridging separate markets.

A growing population has sustained a strong demand for housing. As of 2020/21 the average price for a

home in Bristol was £364,006. The lack of accessible and affordable homes is a critical issue and is worsening, with the average price paid to purchase housing in Bristol having increased by some 68% between 2010-20. This is the second highest increase in price in the UK (UK House Price Index, 2021). Gross weekly pay in Bristol has seen limited growth over the same period, increasing by only 28%, which suggests that the relationship between house prices and local earnings is worsening.

Issues of affordability are particularly acute within the city centre, and are not dissimilar from those recorded in London, where over 50% of those aged 22-29 are unable to access a one bedroom property.

The homes we need

The Bristol Local Plan Review recognises the role of growth and regeneration areas, including Temple Quarter. At the time of writing the Council expects the entirety of Central Bristol, including its growth areas, to deliver at least 15,500 new homes within the plan period, with scope for significantly greater numbers where further interventions and delivery of infrastructure can unlock more potential.

There is an evident and important role for Bristol Temple Quarter & St Philip's Marsh to play in providing new homes to address gaps in the current offer and meet future needs.

There is an evident and important role for Bristol Temple Quarter & St Philip's Marsh to provide new homes to address gaps in the current offer and meet future needs. One key objective in this project is for

the area to support a minimum of 4,000 new homes within Bristol Temple Quarter & St Philip's Marsh by 2040. The development should also explore opportunities for enabling additional new housing beyond the emerging plan period of 2040 in the context of anticipated sustained future demand over the longer-term.

Diversity of housing is an important factor to reflect and attract a broad demographic of residents. This Development Framework should support the delivery of housing which reflects a range of housing needs and collectively ensures the establishment of mixed and sustainable communities within the Temple Quarter. This should include an appropriate mix of apartments and homes. Affordable housing should be secured, and a representative and proportionate mix of 'entry-level' market housing which is accessible to first-time buyers and lower income households.

The typology of housing could assist in blending Bristol Temple Quarter & St Philip's Marsh seamlessly into the adjacent city centre and established neighbourhoods. Liveability of new residential neighbourhoods should be integrated from the outset to accommodate different patterns of movement, working and recreation.

Housing will play a vitally important role in achieving Bristol's net zero carbon ambitions through successful implementation of sustainable policies. This Development Framework presents an opportunity to embed the principles of low carbon, sustainable high density development established through the Urban Living SPD and reflect city-wide best practice.

2.5.3 Student Accommodation

Bristol's higher education establishments have seen significant growth in recent years, including the University of Bristol and the University of the West of England. The University of Bristol have projected further growth in student numbers over the next 10 years, including a major physical expansion of the university with the delivery of a new Enterprise Campus at Temple Quarter. This growth will create an additional need for bed spaces city-wide by 2028.

The expansion in higher education has increasingly seen the development of purpose-built student accommodation, mostly within central locations. There are opportunities to accommodate student accommodation in Temple Quarter. However, to ensure a mixed and balanced community is achieved, the delivery of student accommodation needs to be managed appropriately through the emerging Local Plan and future guidance documents, such as masterplans, prepared for the Temple Quarter area.

2.5.4 Employment

JLL has prepared a draft Employment Land Study on behalf of Bristol City Council (JLL, 2019). The study provides evidence on employment land demand and supply in Bristol and the adjacent areas to help the Council develop its new Local Plan. A summary of this study is in Appendix D. The spatial interpretation of this Employment Land Strategy was provided by Bristol City Council Economic Development team and has been incorporated as an input into this study.

2.5.5 Retail

Pragma has prepared a Retail Strategy on behalf of Bristol City Council (Pragma, 2020). Bristol Temple Quarter & St Philip's Marsh has the opportunity to create a lifestyle quarter, whereby the multiple user streams can live, work, eat and engage in leisure pursuits. To achieve this, a strong convenience offer would be most appropriate. Different user groups will have different requirements and it is important the retail mix reflects this. The retail sector continues to be characterised by uncertainty. Thus, the quarter should not seek to provide a retail offer synonymous or competing with the city centre.

In addition, there are specific opportunities for an improved retail offering at the station. This is a recurring request in customer surveys and in the engagement undertaken as part of this study. It is envisioned that this could be a small local centre to serve commuters, workers and nearby residents.



Figure 20 Restaurant frontages

2.5.6 Heritage

Silverthorne Lane is the only conservation area within the Bristol Temple Quarter & St Philip's Marsh area. Furthermore, The Development Framework area abuts the Bedminster Conservation Area and is also at close proximity to the Redcliffe Conservation Area. Sparke Evans Park in St Philip's Marsh is included on the list of 'Local Historic Parks and Gardens'. There are no World Heritage Sites or Scheduled Monuments within the Development Framework area.

The Development Framework area has a sense of place that is derived from topography, successive layers of infrastructure and associated industrial development. The resultant character is quite different from much of the surrounding city. There are a number of listed buildings and other historic structures that are recognised to contribute to the significance of the local area and Bristol.

The historical value of the vast majority of the site does not match the significance of Bristol Temple Meads station. Brunel's ingenious original terminus is the best surviving major station from the pioneering phase of railway development and the ancestor of all subsequent termini. Brunel was instrumental in the whole enterprise and the association between one of the important and famous of all engineers with one of his most important and famous projects further increases its historic value.

The following listed buildings (and their associated curtilage) are within the Bristol Temple Quarter & St Philip's Marsh area:

- Temple Meads Station (Grade I)
- Bristol Old Station (Grade I)
- Bristol and Exeter Building (Grade II*)

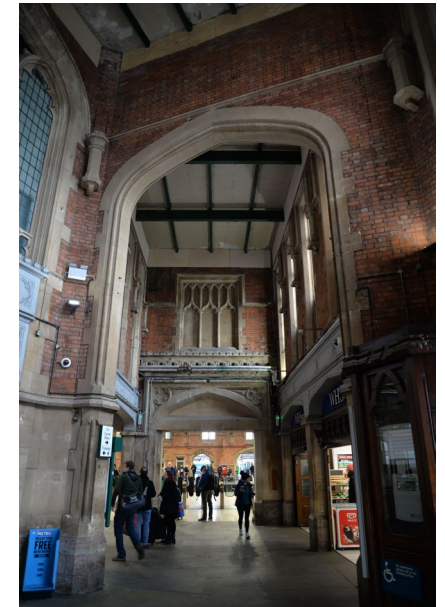


Figure 21 (From left to right) Bristol & Exeter House, Bristol & Exeter Yard, Station Approach, Station Concourse (top)

2.5.7 Flood risk

The River Avon flows in a westerly direction along the southern boundary of the Development Framework area before passing through the centre of the western part of the area. The Feeder Canal passes through the northern section of the area. While the River Avon and the Feeder Canal provide waterside amenity opportunities for the development, they also pose a flood risk to the site.

The area is currently afforded limited protection from fluvial and tidal flooding from a flood defence situated along the right bank of the River Avon immediately east of Temple Meads railway station. This is part of wider flood defence infrastructure that is used to manage and protect Bristol Floating Harbour. Although the area is afforded some limited protection by existing defences, parts of the site remain vulnerable to flooding.

Ground levels across the site vary significantly. Temple Meads station (and the area immediately south), the site of the Wholesale Fruit Centre and the railway depot are all at a raised level typically 13 – 14m AOD. However large portions of St Philip's Marsh are between 8 and 10m AOD, with parts of Albert Road and Feeder Road being as low as 7.2m AOD.

A review of the Environment Agency (EA) Flood Map for Planning in 2019 indicates approximately 35% of the development area is within Flood Zone 3 and 45% is within Flood Zone 2. The potential impact of climate change on sea level rises is predicted to have significant impact on the development area with the proportion of the site falling within Flood Zone 3 predicted to increase to 50% by 2110. Without management of flood risk, development of the site,

in particular for uses classified as 'more vulnerable' such as residential development, will be constrained. The figures to the right represents the EA Flood Map for Planning in 2019 and 2022. Notably, the EA Flood Map for Planning in 2022 shows an increase of land within Flood Zone 3.

Bristol City Council, in partnership with the EA, approved the Bristol Avon Flood Strategy Strategic Outline Case* (SOC) in March 2021. The strategy's objectives include to support the safe living, working and travelling in and around central Bristol by ensuring flood threat is reduced. Additionally, the strategy aims to facilitate the sustainable growth of Bristol and the West of England by supporting opportunities for employment and residential land, and infrastructure.

The SOC sets out the case to deliver a strategic flood risk management approach to central Bristol with further measures upstream and downstream of the city centre. Further work is now being done to develop Outline Business Cases (OBCs) to refine the proposals and unlock funding to move in to full business case and construction.

The Level 1 Strategic Flood Risk Assessment (SFRA) for Bristol was published in December 2020. The level 1 SFRA provides a citywide assessment of flood risk from all sources assessing the risk now and in the future, taking in to account the predicted effects of climate change. The level 2 SFRA is in the process of being updated in line with the development of the emerging Local Plan.

*<https://www.ask.bristol.gov.uk/bristol-avon-flood-strategy-consultation>

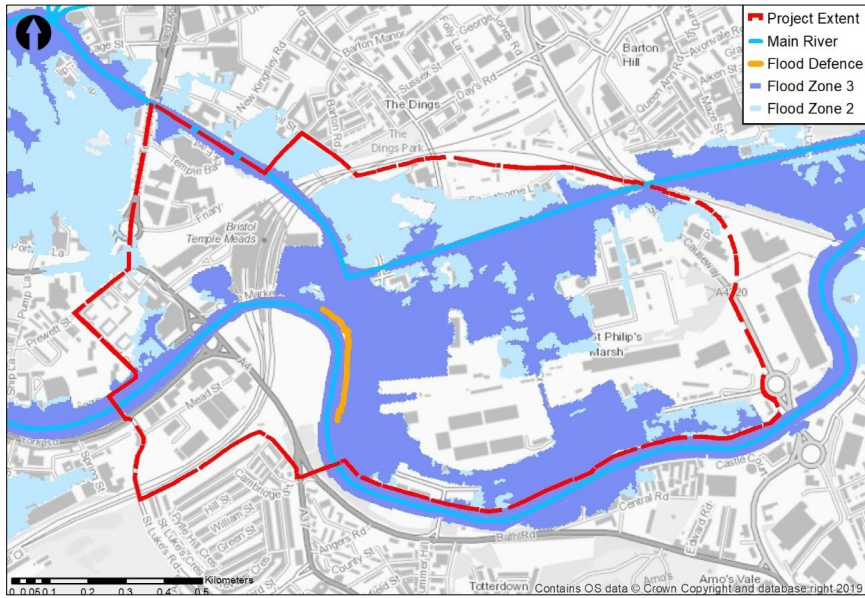


Figure 22 Flood risk context in 2019 © Environment Agency

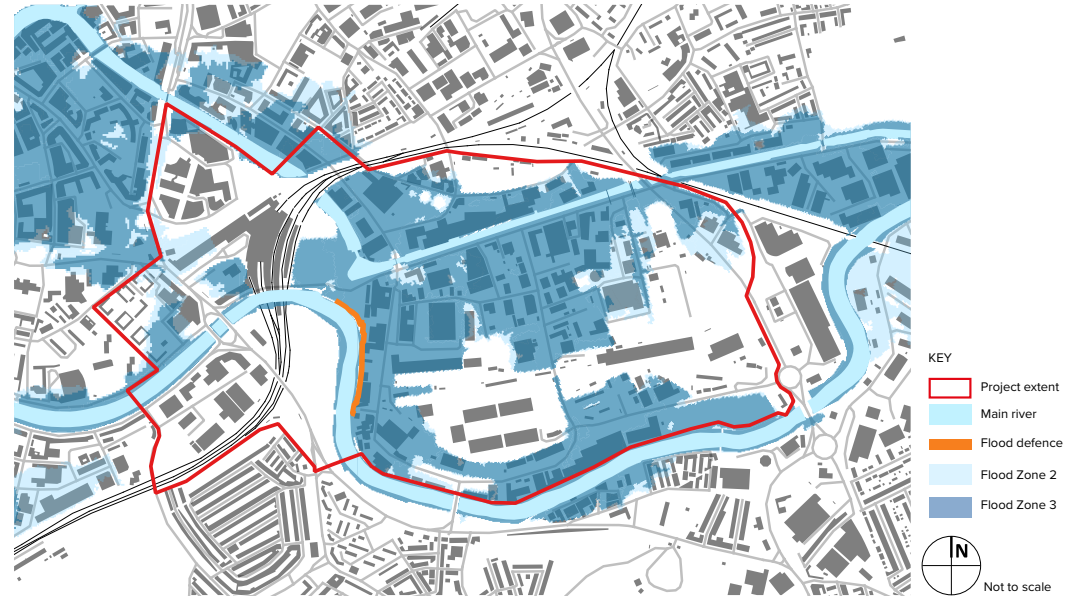


Figure 23 Flood risk context in 2022 © Environment Agency

2.5.8 Movement and connectivity

The Bristol Transport Strategy (Bristol City Council, 2019, page 14) includes a helpful summary of movement and connectivity in the city:

"The city has two major watercourses flowing through it, which brings constraints in movement from one side of the city to the other as there are limited options to cross them, contributing to bottlenecks at various points in the city centre.

Bristol has many major transport corridors that stretch from beyond the city boundary to the city centre. There is very high demand on these corridors and they transport thousands of people travelling from the wider area daily. The impacts are felt at a local level, however the strategic nature of these linking routes need a coordinated approach...

Bristol has a number of local centres that provide key services and facilities but are also destination points in their own right, attracting visitors from across the city such as Gloucester Road, Bedminster, Fishponds, Clifton and many more.

Bristol's neighbourhoods and residential streets are all designed differently as a result of the different eras in which housing has been developed. This ranges from narrow, Victorian streets where houses do not have off street parking to wide modern streets, shared spaces and home zones.

The way our city is laid out means that day to day travel patterns are varied and it is recognised that an approach to how we plan movement in and through the city centre has to be different from how we plan movement in and between residential areas and local centres."

The continued development of transport networks in Bristol and the wider West of England is governed and guided by a suite of policy documents and publications. Key documents are summarised in Section 2.3.

Several diagrams of Bristol's transport network are presented overleaf:

- Figure 25 – Central highway network
- Figure 26 – Central pedestrian network, including proposed routes, from the Bristol Central Area Plan (Bristol City Council, 2015)
- Figure 27 – Central cycle network
- Figure 28 – High-level proposed public transport improvements, from the Bristol Transport Strategy (Bristol City Council 2019)

In addition, Figure 288 presents high-level proposed public transport improvements, from the Bristol Transport Strategy (Bristol City Council, 2019). This re-emphasises the importance of Bristol City Centre and Bristol Temple Meads at the heart of the region.

Challenges

The key transport challenges facing the city are:

- **Housing, jobs and regeneration:** Over 100,000 new homes and new jobs needed across the region by 2036³
- **Equality:** Bristol has some of the most deprived areas in the country, with a difference of 16 years in healthy life expectancy between the most and least deprived areas of the city⁴.
- **Health:** Physical inactivity contributes to 1 in 6 deaths and around 300 deaths a year are due to air pollution⁵.
- **Better places:** We need to tackle poor quality public space by creating high quality places and making better use of our streets
- **Reliable journeys:** Bristol has some of the worst congestion in the country, causing unreliable journeys for many people⁶.
- **Sustainable growth:** We need to support economic growth and accommodate emerging technologies while cutting carbon emissions.

Figure 24 Key transport challenges, Bristol Transport Strategy (2019)
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