DOMINUS BRISTOL LIMITED
New Henry Street
Commercial Strategy Report

November 2023

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AND London has been appointed by Dominus Bristol Limited ('Dominus') asked to conduct an analysis of all leasing activity of commercial space and provide insight into the local business community to inform strategic recommendations on the quantum and location of the commercial spaces across the site.

The proposed redevelopment addresses a clear and unmet demand for smaller units and maker spaces. Recognizing the importance of comprehensive market analysis, AND were asked to, and actively sought input from the local community to determine the optimal size, arrangement, and specifications for the proposed maker spaces.

Taking into account the insights gained from this collaborative approach, the units have been meticulously designed to align with the identified needs and preferences of potential users. This commitment to understanding and incorporating expert and community feedback positions the development as a tailored solution to the unmet demand for smaller units and maker spaces in Bristol.

The suitability of the proposed units is underscored by their alignment with the identified demand, appealing to a diverse range of individuals and businesses seeking flexible and specialized spaces. The development is poised to contribute significantly to satisfying the prevailing market gap.

In addition to addressing the demand, the commercial aspect of the scheme is projected to deliver tangible economic benefits, including job creation and Gross Value Added (GVA). The Economic Benefits Assessment, currently in preparation, will provide detailed insights into the anticipated positive outcomes.

Comparatively, the existing site operates at a low density and supports a relatively modest number of jobs. The proposed development represents a transformative shift, promising a substantial enhancement by providing a higher density of purpose-built units and fostering a dynamic environment conducive to economic growth.

In conclusion, the proposed development not only addresses the unmet demand for smaller units and maker spaces in Bristol but also stands out as a commercially viable venture with the potential to significantly elevate economic outcomes, job opportunities, and overall community impact.

EXECUTIVE SUMMARY

01

INTRODUCTION

- To conduct an analysis of all leasing activity of commercial space under an agreed quantum threshold within retail, industrial and office sectors, within an agreed radius of site (to include conversing with local agents and occupiers) to ensure a complete picture of the market is obtained with regards to uptake and demand of a range of commercial typologies. This will include analysis of: size of individual transactions; months on the market; level of vacant units within the study area; average rents per sqft; new commercial stock under construction

- To provide analysis and insight into the local business community including sector analysis, size of businesses, number of employees, identifying any relevant business clusters and trends

- To review the existing commercial proposition for the scheme and provide advice and guidance on how it can be enhanced to provide optimum fit for purpose commercial space.

- To work as part of the project team with Dominus to produce a comprehensive vision, narrative and strategy for the commercial component of the scheme, to create a viable and sustainable commercial offer for the development to exemplify the client's commitment to providing genuinely operator-attuned workspace.

- To work closely with Dominus and the scheme architects to create high quality flexible workspaces that are well designed, fit for purpose and meets local market requirements for small, modern and flexible space, demonstrating that there is an established need for light industrial maker spaces in this location.To ensure the scheme is future proofed and suitable for a range of uses, ensuring that the space is flexible and adaptable to demands and requirements of the commercial sector as the wider scheme develops.

- To provide the completed and agreed advice as a full commercial strategy document that will form part of the planning submission.

- Identifying the most appropriate locations for various use classes and providing advice on: Likely initial estimated rental values (ERVs); and how to future proof the commercial space for evolving uses and operators. Advice on initial leasing structures and likely void periods.

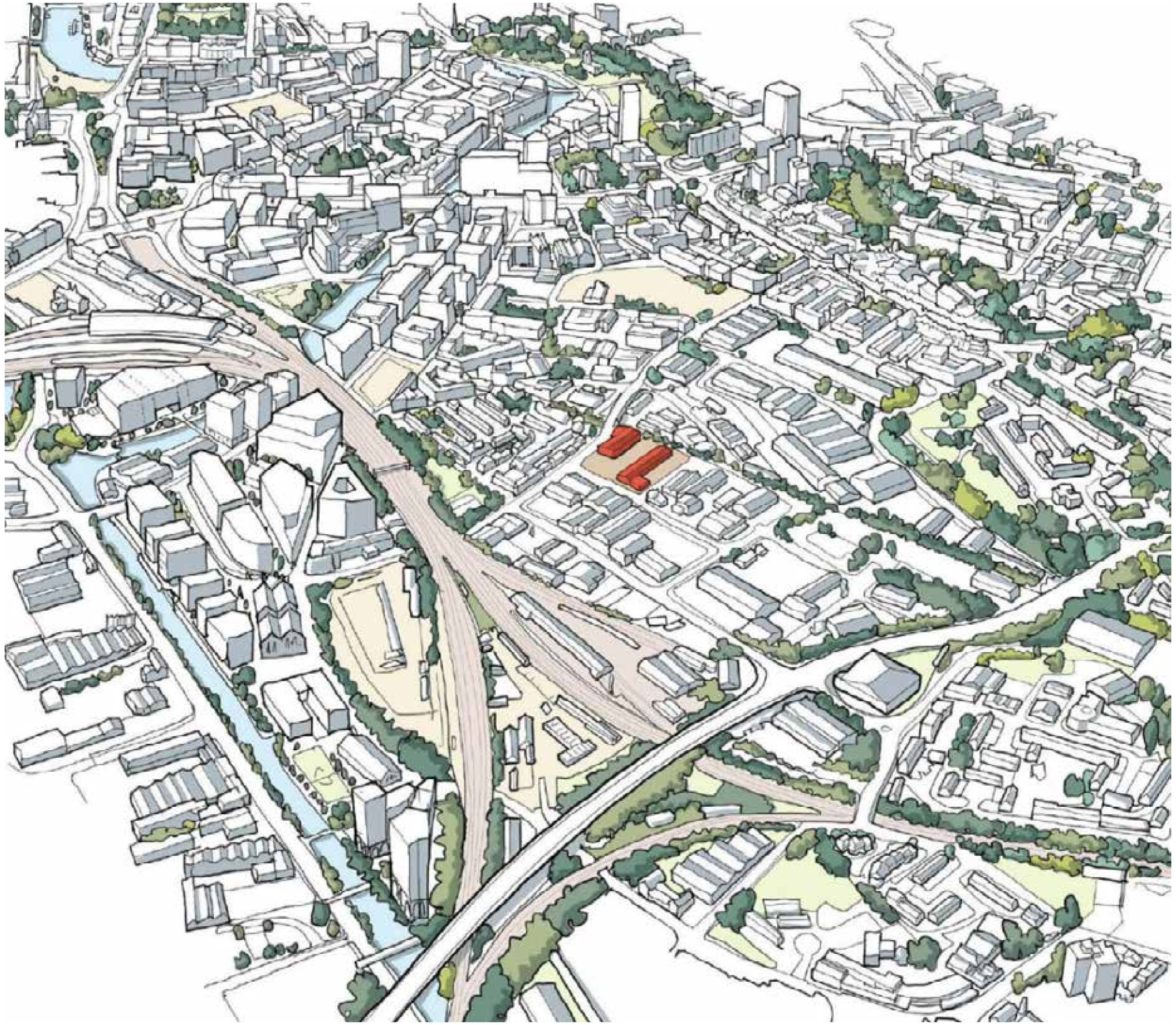
- Full commentary on specification i.e. shell, enhanced, white box. In particular, to outline where it will be appropriate and necessary for enhanced specification to minimise void periods and quickly ensure momentum for the project.

THE BRIEF

The proposed scheme being brought forward by Dominus Group is a mixed use redevelopment of a site which currently comprises Premier Business Park on New Henry Street in Bristol. Bordered by Kingsland Road, Sussex Street, Alfred Street and the Bristol & Bath Railway Path, the site falls within the Old Market and Dings Neighbourhood, just to the north of Temple Quarter Enterprise Zone.

The New Henry Street development is being designed by renowned architects AHMM and will comprise the following development:

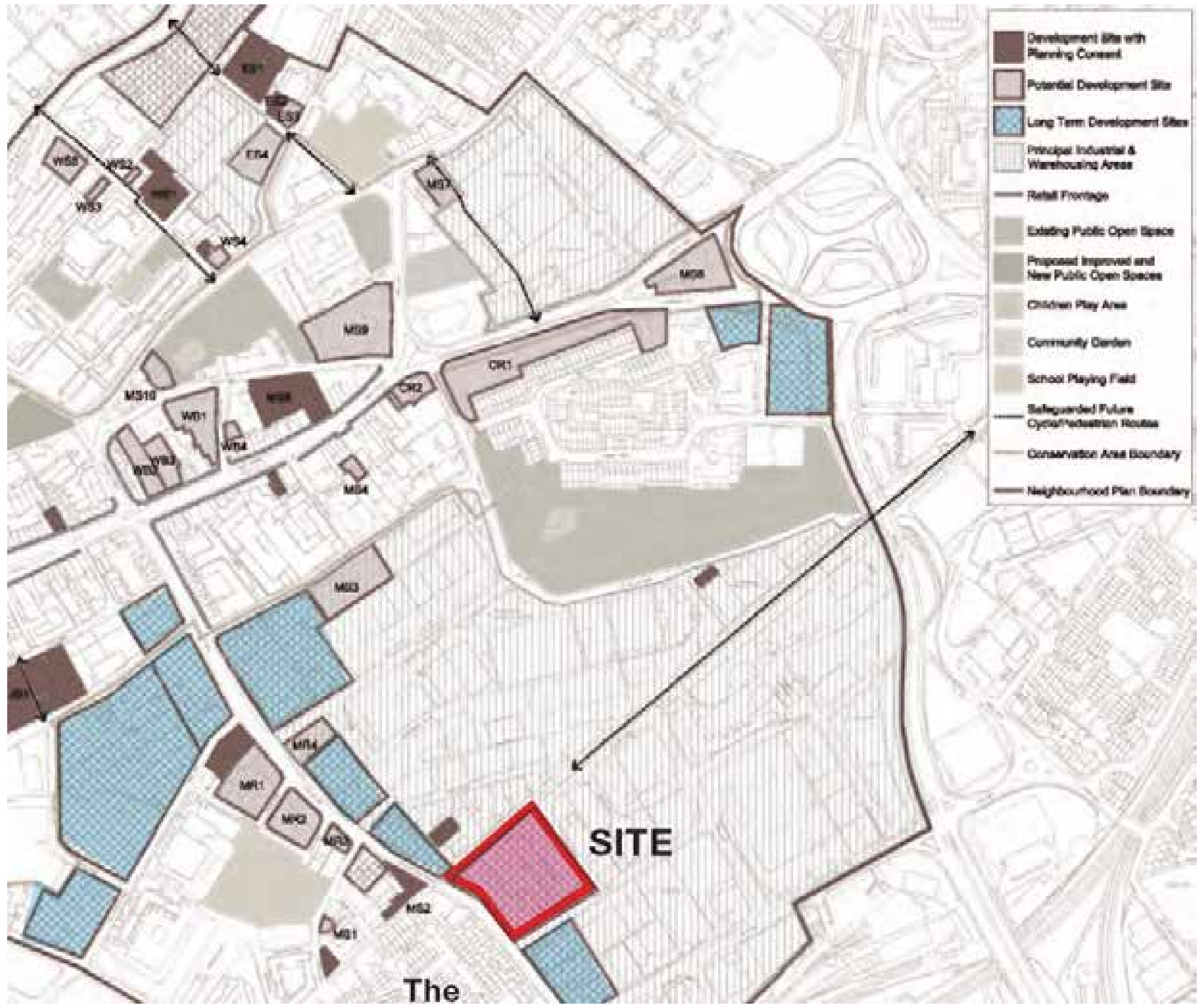
Demolition of existing structures and redevelopment of the site for two conjoined buildings comprising light industrial use (Class E(g)(iii)); flexible retail/light industrial use (Class E(a) / Class E(g)(iii)); flexible commercial use (Class E(b-g)); flexible industrial use (Class E(g)(iii) / Class B8 / Sui Generis; student accommodation use with ancillary community space (Sui Generis); public realm works and landscaping; cycle parking; ancillary plant and servicing; and other associated works.



THE SCHEME

Currently home to a number of businesses including a large Calor Gas storage yard and a scrap metal business, the site comprises of two large two-storey brick warehouse buildings and yard space. The site has been identified as a Long Term Development Site in Bristol City Council's Development Plan.

The site and the adjacent sites on Kingsland Road are also identified as Long Term Development Sites in the Old Market Quarter Neighbourhood Plan, with a timescale of coming forward by the end of the plan period in 2026.



Neighourhood plan site designations

THE SITE AND EXISTING USES

02

POLICY CONTEXT

The Old Market Neighbourhood Plan

The Old Market Neighbourhood Plan is a neighbourhood plan put together by the Old Market Community Association as an explicitly aspirational, yet malleable, plan for the development of the Old Market neighbourhood between 2015 and 2026.

The Rapleys Planning Statement highlights the Old Market Neighbourhood Plan's intention for a flexible approach to areas designated as Principal Industrial and Warehousing Areas (PIWAs). At present, a portion of the Old Market Neighbourhood Plan is designated as a PIWA and is thus reserved for industrial uses. The Statement recognizes that there are positive benefits for employment. However, these spaces misalign with the development of an attractive and lively neighbourhood. For this reason, the plan advocates that residential and non-commercial development should only occur near sites with lighter industrial uses.

The plan forefronts neighbourhood aesthetics, the provisioning of greenspaces, as well as active transportation. Prior to the plan, the development of the Old Market neighbourhood had been focused on vehicular connectivity. This resulted in what the plan describes as an unhealthy decline in footfall which implicated retail spaces within the residential area. It is the intention of the plan to centralize the development of retail spaces as well as multifaceted workspaces to provide for a wide range of employment uses.

Considering this, the plan also emphasises the importance of diminishing disturbance to the neighbouring residential properties.

- Flexible workspaces to be developed with diminutive affects for residential neighbourhoods.
- Increased options to be provided on residential market, aside from prevailing offering of two-bedroom flats
- Advocates for a specialized retail sector to attract visitors
- Improve transportation for active travellers by widening the sidewalks and adding greenery where appropriate

POLICY CONTEXT

Bristol Central Area Plan

The Bristol Central Area Plan is part of the Bristol Local Plan and sets out planning policies and site allocations to guide development in Bristol's city centre and surrounding inner city areas over the period to 2026.

The plan aims to enable growth while enhancing the vibrancy, sustainability, and quality of the central area, creating well-connected mixed-use neighbourhoods with distinct character. Key sites are identified for development along with policies to guide change.

The Premier Business Park site (BS2 0RA) falls under the Bristol Central Area Plan Boundary.

Policies on Industrial Intensification

The Central Area Plan does not identify the city centre as a location for significant new industrial or warehousing development, as this type of development is focused on other parts of the city outside the central area.

However, there is recognition of the need to preserve existing industrial and warehousing floorspace within the city centre, particularly in Harbourside where there is a concentration of such uses on Spike Island.

Areas currently used for maritime industries around the Floating Harbour are designated as Maritime Industrial and Warehousing Areas in the plan (Policy BCAP8). These areas will be safeguarded, and development expected to protect or enhance the maritime function.

There are also several designated Principal Industrial and Warehousing Areas just outside the city centre boundary, such as in Pennywell Road and St. Philip's. These will continue to be safeguarded for industrial and warehousing uses under separate policies in the Site Allocations and Development Management Policies document.

•Policy DM12: Principal Industrial and Warehousing Areas - Safeguards designated PIWAs, including those just outside the central area like St Philip's, for industrial and warehousing uses.

•Policy DM13: Industry and Warehousing in Other Areas - Supports new and intensified B1c, B2 and B8 uses outside of PIWAs where criteria are met.

The plan encourages temporary uses on vacant industrial sites that would not prejudice their future redevelopment for employment uses.

•Policy DM14: Office Development - Supports new office floorspace within the city centre. B1a light industrial use would fall under this classification.

There is also some flexibility to lose poor quality office buildings to alternative uses in areas like Nelson Street and Lewins Mead if it would deliver regeneration benefits, but industrial sites should be retained wherever possible.

POLICY CONTEXT

Policies on Maker Spaces

•Policy BCAP35 - For the Temple Quarter Enterprise Zone, the plan envisions flexible creative workspaces as part of the employment mix. Maker spaces would fit well within this vision.

•Policy BCAP46 - In the Old Market area, there is support for regeneration including employment space suitable for small businesses.

Policies on Creative Industry/Local Creatives

The plan recognises the importance of the creative industries sector to Bristol's economy and that there are opportunities for further growth in this sector (Section 4.2).

While policies are not specifically targeted at local creatives, many policies would support small creative businesses and provide the types of flexible space they require.

•Policy BCAP6 - states that small-scale flexible workspace suitable for a range of employment uses will be encouraged in parts of the central area. This would provide space for local creative businesses.

•Policy BCAP35 - In Bristol Temple Quarter, the plan envisions flexible creative workspaces as part of the employment mix in the Enterprise Zone.

•Policy BCAP46 - In the Old Market area, employment space for small businesses is supported, which would include creative industries.

Policies on Employment

The Central Area Plan incorporates a range of policies and proposals to significantly boost employment in the city centre, especially office-based jobs but also supporting small businesses and the knowledge economy.

•Policy BCAP6 - The plan aims to deliver 150,000 sqm of new office floorspace in line with the Core Strategy target. Major office growth is directed to Bristol Temple Quarter and supported in Redcliffe.

•Small-scale flexible workspaces are encouraged in Old Market, St Paul's, Stokes Croft etc. to support small/start-up businesses.

•Policy BCAP7 - The loss of employment space will be resisted in Old Market and other inner east areas.

•Policy BCAP7 - Some flexibility is provided on loss of outdated office space in areas like Nelson St/Lewins Mead if it enables regeneration.

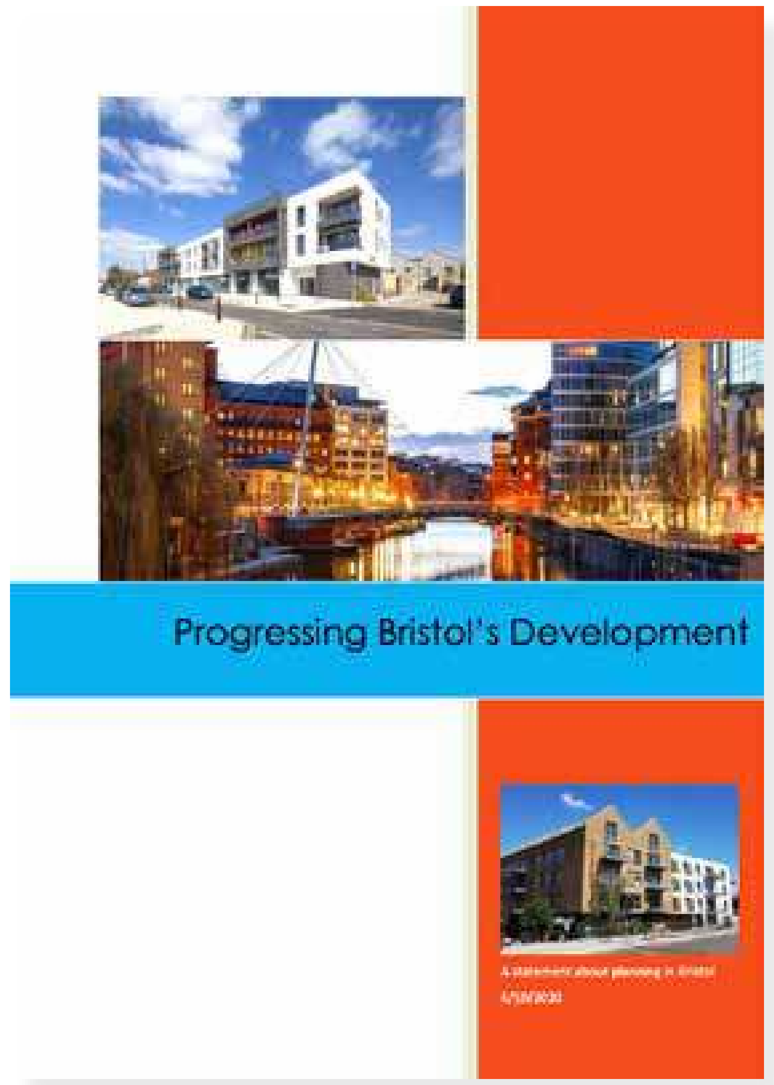
•Policy BCAP9 & BCAP11 - New cultural, tourism and university facilities that generate jobs are supported.

•Housing growth will provide construction jobs and stimulate other employment through extra demand.

•Transport improvements like MetroBus will improve access to jobs.

•Public realm enhancements will support the city centre's overall attraction for investment and jobs.

POLICY CONTEXT



Progressing Bristols Development

Progressing Bristol's Development (2020) is a statement about planning in Bristol which explains the current approach to making planning decisions. The statement sets out Bristol's approach to planning and development as the city recovers from COVID-19. It aims to promote inclusive growth through new housing, jobs, infrastructure, and action on climate and ecological emergencies - shaping the city's future while enhancing its valued character.

Industrial Intensification

- Bristol has strategically important industrial areas that will be protected and promoted for growth and renewal, including Avonmouth/Bristol Port, South Bristol, and East Bristol.

• Avonmouth and Bristol Port is a regionally important port and industrial location with 640 hectares for port uses, industry, distribution, power generation and renewable energy. Plans are in place for the future growth and expansion of the port.

• 235 hectares of strategic industrial and distribution land is identified across 35 locations in addition to Avonmouth/Bristol Port. This includes 150 hectares at 18 industrial estates in South Bristol and 85 hectares at 17 locations in East Bristol.

• New industrial land is identified at Vale Lane and Western Drive in South Bristol.

• The local plan aims to increase jobs and deliver new homes in St Philip's Marsh while retaining its role for industry and employment, showing support for light industrial development in this area.

• Policies aim to prevent sensitive uses being located close to existing industrial areas and undermining their future viability.

POLICY CONTEXT

Maker Spaces

- The Progressing Bristol's Development statement does not specifically mention Maker spaces, however there are some relevant points related to providing spaces for small-scale manufacturing, creative industries, and innovation.
- Areas of growth and regeneration at Western Harbour, Frome Gateway, central Bedminster, Lawrence Hill, and central Fishponds will incorporate new workspace as part of mixed-use developments.
- Over 70 existing development allocations in the current local plan include workspace, and 20 proposed new allocations will also incorporate workspace.
- Bristol Temple Quarter is identified as an innovation district with new forms of workspace.

Local Creatives/Creative Industry

The Progressing Bristol's Development statement highlights the growing creative industries, media, and environmental services sectors in the city centre.

• Bristol Temple Quarter is identified as an innovation district. The vision is to link leading research and development with major businesses, which could include creative industries.

• Areas of growth and regeneration at Western Harbour, Frome Gateway, central Bedminster, Lawrence Hill and central Fishponds will incorporate new workspace as part of mixed-use developments which can accommodate creative industries and local creatives.

• The Progressing Bristol's Development statement highlights the importance of music venues, clubs and cultural diversity to the city's night-time economy. The "agent of change" principle is intended to protect these existing venues.

• Industrial land is safeguarded for a mix of uses including creative industries and new forms of workspace.

POLICY CONTEXT

Employment

The Progressing Bristol's Development statement articulates a clear policy direction to deliver diverse new employment opportunities and workspaces across Bristol's urban area.

• A key objective is supporting sustainable and inclusive economic growth across the city by developing new workspace.

• The city centre is highlighted as a major employment hub, with scope for thousands more jobs in professional services, financial services, insurance, creative industries etc.

• Bristol Temple Quarter will provide a range of new employment opportunities and workspaces.

• St Philip's Marsh will continue to be an important location for industry and employment. The aim is to increase the number of jobs as well as deliver new homes.

• 235 hectares of strategic industrial and distribution land is safeguarded for employment uses, including 60 new hectares at Avonmouth.

• Areas of growth and regeneration will incorporate new workspace and job opportunities as part of mixed-use developments.

• Over 70 existing development allocations and 20 proposed new allocations include workspace provision.

• Where existing workspaces are redeveloped, policies expect new workspace provision as part of developments.

• The plan supports continued growth in knowledge-intensive sectors such as professional services, technology, media, telecoms, and research.

• Objectives aim to promote rapid economic recovery and build resilience.

POLICY CONTEXT

03

DEMAND ASSESSMENT

METHODOLOGY

1

The Study Area around the Subject Site was defined

2

We conducted a full analysis of all leasing activity within the Industrial sector over the past five years

3

We also conversed with commercial agents and local occupiers to ensure a complete picture of the market was obtained

4

This was followed up with random physical spot checks within the Study Area of buildings, verifying the accuracy of the data

5

The following points were covered in the analysis:

- Size of individual transactions
- Months on market
- Level of vacant units in the Study Area
- Study of inventory by size bracket
- Average market rent per sqft.
- Rent levels and likely incentive packages
- Type of stock on the market and why Analysis of type of occupiers (new economy, old economy, larger or small businesses, and use class)
- New commercial stock under construction
  Stock condition of the local inventory

INTRODUCTION

The purpose of this demand assessment is to demonstrate a demand for smaller light industrial spaces suitable for maker spaces. A maker space is a physical location where people gather to co-create, share resources and knowledge, work on projects, network, and build. They help users develop their skills and creativity, promote the development of high-end technology skills, and inspire younger generations to engage with science and technology. They fall under Use Class E(g)(iii), which refers to any industrial process which can be carried out in a residential area without detriment to the amenity of that area by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust, or grit.

The strong growth experienced in maker spaces over the past decade will not materialise in certain locations unless sufficient land is allocated where appropriate for the use in question. It is critical that the evidence that supports such decision making in the planning system follows a robust methodology and does an accurate job at assessing the demand for maker spaces. However, given the lack of a clear, unambiguous approach to assessing economic need in the Planning Practice Guidance, different strategies are being adopted. However, many of these strategies are backward-looking and not fit for purpose. Common examples of such strategies include:

1. Consultations with organisations and studies of business trends are insufficient on their own, as most agents don't take a longer-term view which is essential to determining land requirements. There is often a transactional focus rather than a land focus

2. Demographic assessments of current and future labour supply, looking at housing growth in the local area, have no relationship with industrial and logistics markets

3. Translating population projections into a floorspace requirement lacks transparency and allows for very limited scrutiny. Furthermore, this approach does not have a land focus, which is the core requirement to facilitate industrial and logistics growth

The inadequacies of these models and their application is evident in that supply has not kept pace with demand. Our approach overcomes these limitations, projecting forward future demand based on the balance between historic net absorption and net deliveries in order to demonstrate whether the demand for maker spaces in Bristol is demand- or supply-constrained. We also account for external growth drivers such as online retailing growth, a human-centric approach to design, and wider commercial trends.

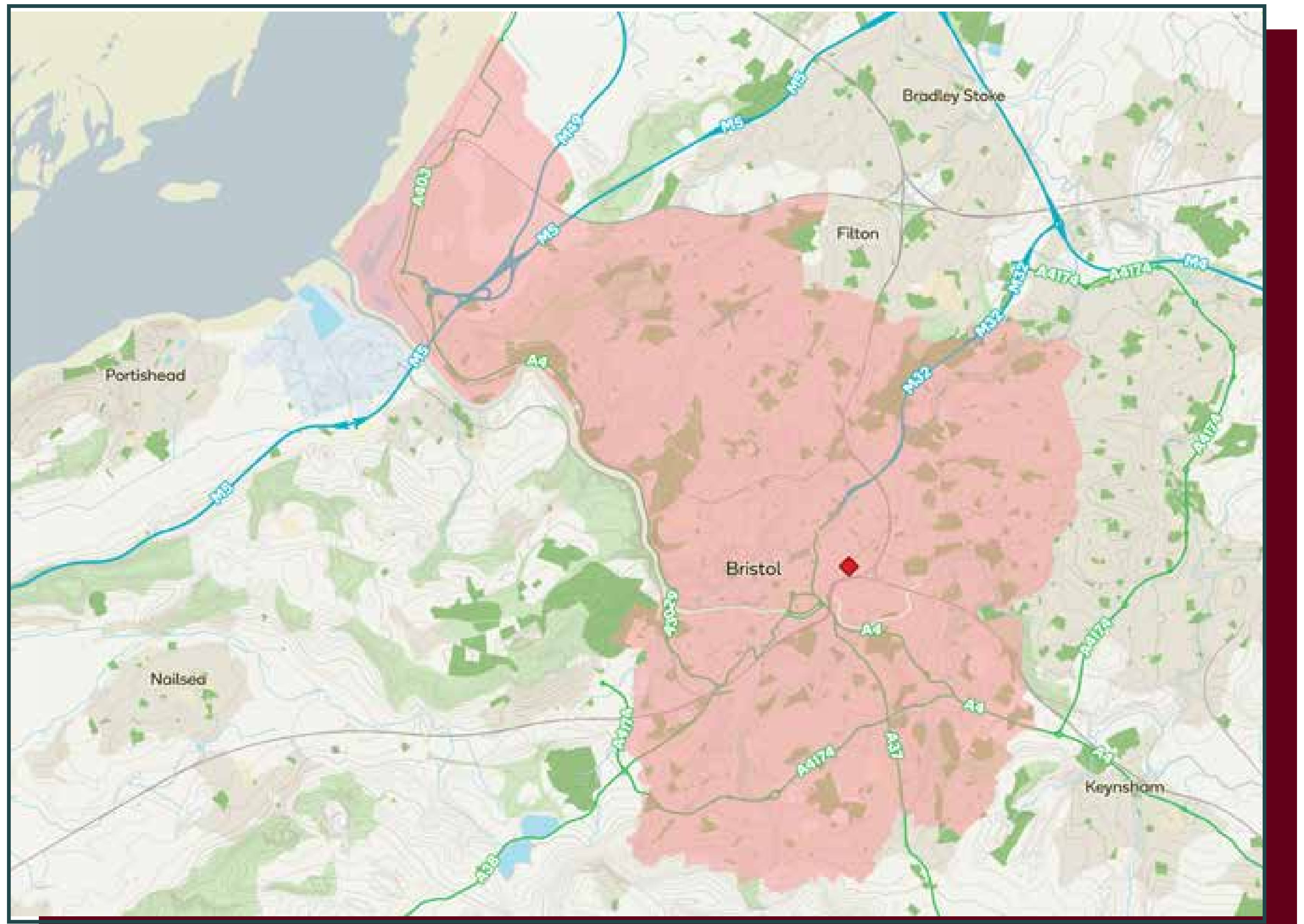
Source: National Planning Policy Framework (2023) ; Department for Culture, Media & Sport (2019); AND London

THE STUDY AREA

The study area was defined as the Bristol Core Industrial submarket, within which the New Henry Street site is located.

Our leasing experience has shown that occupiers sometimes opt for a radius search around their existing site or area of interest when looking for new spaces, rather than using borough or administrative boundaries. However, in this instance, we have opted to look at the Bristol Core submarket as a whole rather than a radius. This is in order to provide the most representative sample of comparable locations across Bristol while accounting for the entire functional economic market area surrounding the site. The Bristol Core submarket incorporates the spatial distribution of properties across the entire urban area which enables clusters of industrial activity to be identified and further analysed. Furthermore, industrial occupiers in particular tend to locate near major transport corridors in order to keep travel times as short as possible. The Bristol Core submarket covers all relevant transport links, such as the M5, M32, and M49, which gives allows for a more detailed consideration of location and access.

The Bristol Core submarket area corresponds with the Bristol Local Authority district boundary. Natural borders are created to the west by the Bristol Channel and the River Avon. The closest neighbouring cities is Bath to the East and Cardiff to the West, across the Bristol Channel. The site is located within the St. Philips Ward in central Bristol. St Philips begins to the South along the River Avon, and is divided by the Feeder Canal This site is nested within the Temple Quarter, whose development framework serves as one of the UK's largest regeneration projects. While the Temple Quarter plans are explicit and ongoing, its intentions pertaining to St. Philips Marsh, specifically, are self-defined as occurring over a longer period and less clear. Intentions were made for a new secondary school to be built in addition to the Hannah More Primary School already located near the site. Presently, a considerable majority of the buildings located in St Philips are industrial. There is little to no retail offering and very few office units as well. Additionally, there is a smattering of new breweries and cafes within St Philips.



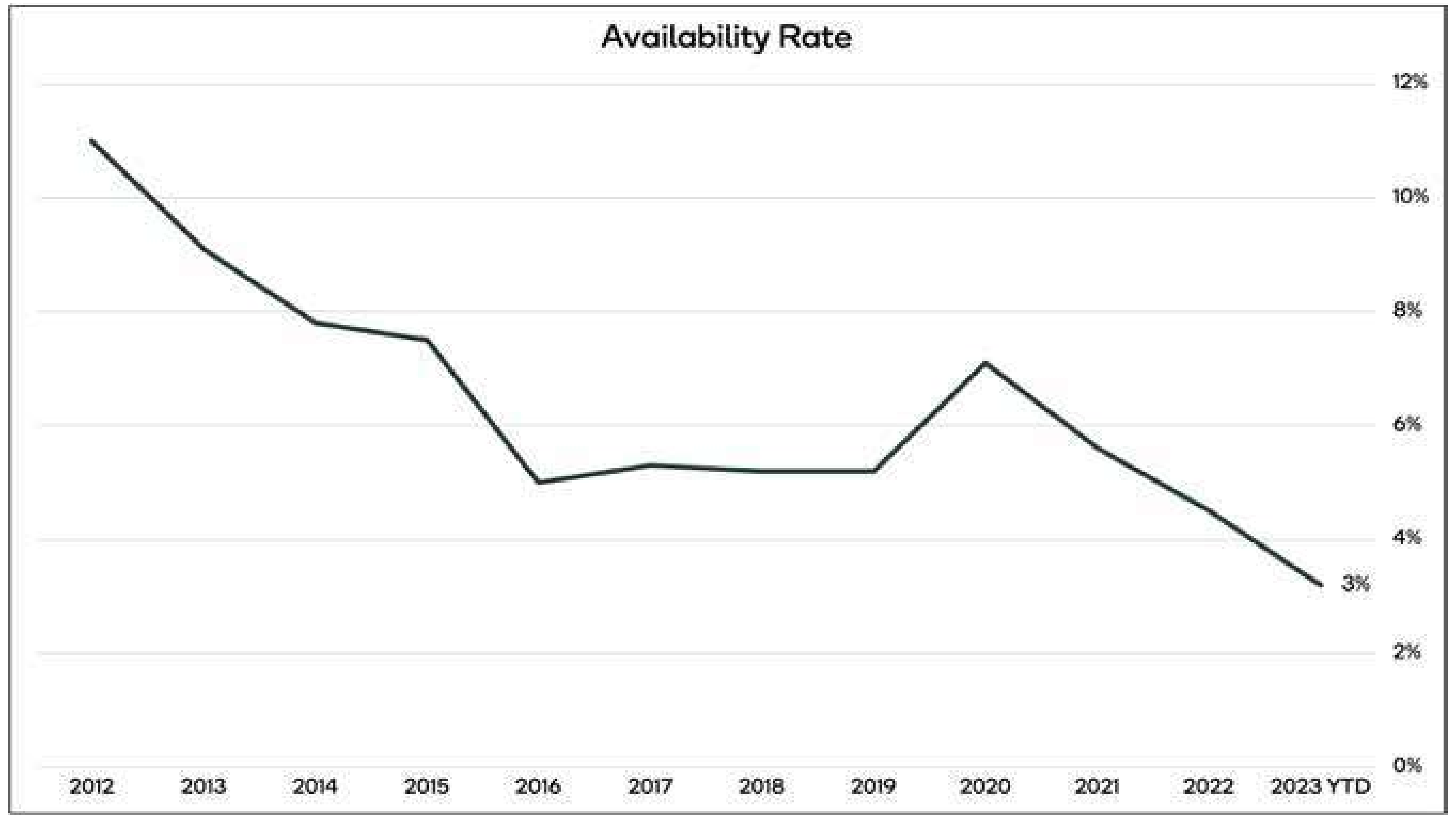
Our industrial demand assessment focuses on the entire Bristol Core submarket in order to provide the most representative sample of comparable locations around the city, while considering the relative economic conditions of the area directly surrounding the site.

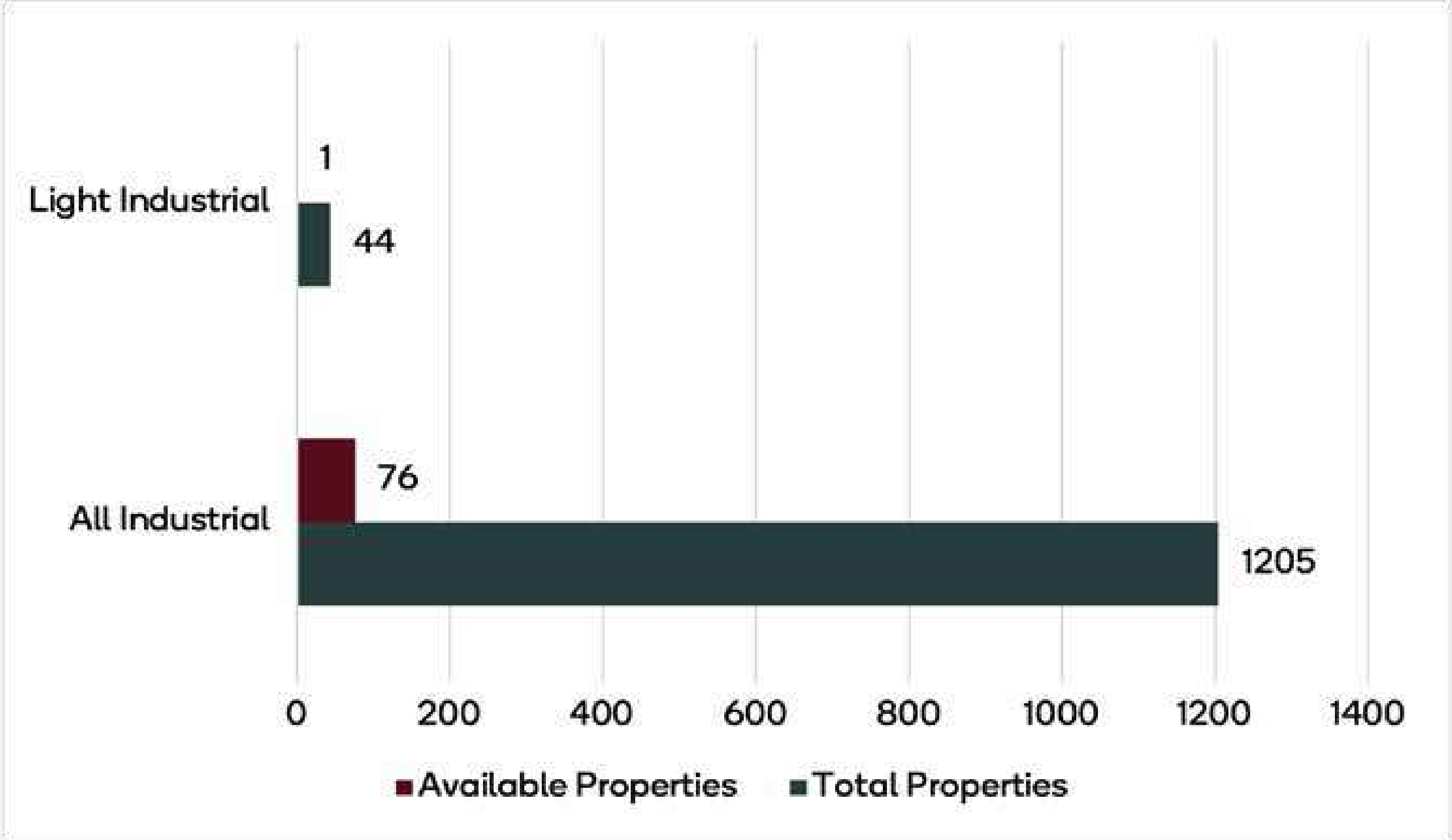
When we refer to industrial floorspace we mean Light Industrial (previously B1c, now part of Class E), General Industry (B2), and Storage and Distribution (B8). These use classes typically cover the diverse range of industrial, manufacturing, and logistics companies that operate in England.

Within the city of Bristol, there is 981,912 sq ft of available industrial space, which comprises 3% of total industrial space. After peaking in 2012, availability has declined over the past decade. There was a brief uptick in 2020 where availability rose back up above 6%, but it has continued to decline and is now at its lowest level in comparison to the past decade. Vacancy is also extremely low at 2.4%. Nationally, 8% availability is typically accepted as an equilibrium level, where supply and demand of industrial properties are in balance. Therefore, the 3% availability rate in the Bristol core submarket indicates a supply and demand imbalance, where there is high demand and not enough supply. There is potential for this lack of supply to be accomodated by light industrial properties, particularly maker spaces. There are just 1.32 years of supply on the market as a whole showing that more industrial floorspace is required in Bristol to meet pent-up and ever-increasing demand.

The majority of industrial properties in the study area are those with heavy technical capacity, rather than light industrial properties, which are typically used as maker spaces, smaller storage units, and to deliver products more immediately to local customers. Indeed, while the total number of industrial properties is 1,205, just 44 of these are light industrial.

DEMAND ASSESSMENT





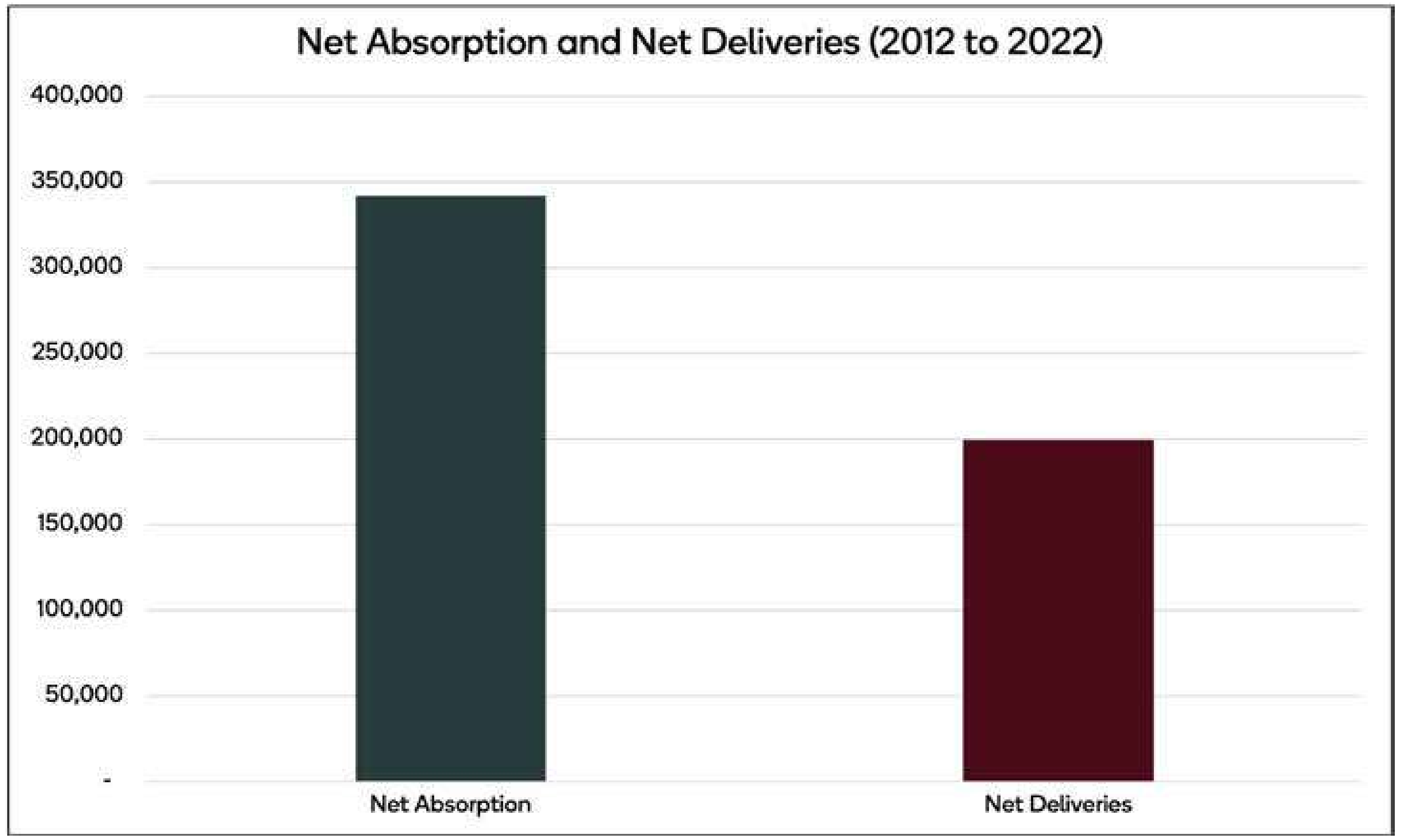
Source: CoStar (2023); AND London

The city of Bristol presented its Central Area Plan in 2015, which advocates industrial intensification with particular emphasis on creating additional creative spaces. More holistically, light industrial properties are going in their popularity owing to their relative ability to facilitate a secure, localized supply chain and for environmental sustainability.

Of the 44 light industrial properties, just one has available space, representing 1,160 sq ft and less than 1% of the total available industrial space. This indicates a severe lack of supply and a critically low availability of spaces of this size.

Historically, net absorption has been positive and has exceeded the total floorspace delivered for more than the past ten years. This indicates that more tenants were entering the market than leaving, and that this outpaced the new floorspace being delivered. This resulted in the low availability and vacancy that we see today. In 2020, for example, net absorption was 398,011 sq ft, whereas deliveries were less than half of this, at 193,825 sq ft.

There have been just three new industrial properties delivered in 2023 – all of which are warehouses. This does go some way towards addressing the serious imbalance between supply and demand. However, as reflected in the Rapleys report in its reference to the Old Market Neighbourhood plan, industrial spaces produce negative effects of residential well-being. Despite having positive employment benefits, large industrial properties produce environmental and noise pollution while also diminishing engagement with local neighbourhood character. Larger industrial uses thus misalign with the Neighbourhood plan. However, considering the market demand for industrial floorspace delivery, New Henry Street industrial development should emphasize light industrial uses for their relatively positive environmental effects and reduced impact on community attractiveness.



Source: CoStar (2023); AND London

DEMAND ASSESSMENT

INDUSTRIAL DEMAND ASSESSMENT

7.2 AVERAGE MONTHS ON THE MARKET

1.3 YEARS SUPPLY ON THE MARKET

2.6% VACANCY RATE

VACANCY

982K SQ FT TOTAL AVAILABLE SPACE

76 PROPERTIES WITH UNITS AVAILABLE

3.2% AVAILABILITY RATE

18.2K SQ FT UNDER CONSTRUCTION

£9.46 PER SQ FT AVERAGE RENT

30.9M SQ FT INDUSTRIAL INVENTORY

AVERAGE ANNUAL TRANSACTIONS
67 DEALS
744K SQ FT

8.4% ANNUAL RENTAL GROWTH

Year	Transactions	Total	AVERAGE TRANSACTION SIZE
2023	27 TRANSACTIONS	472,220 SQ FT	17,490 SQ FT
2022	52 TRANSACTIONS	760,073 SQ FT	14,617 SQ FT
2021	75 TRANSACTIONS	785,825 SQ FT	10,478 SQ FT
2020	71 TRANSACTIONS	678,809 SQ FT	9,561 SQ FT
2019	70 TRANSACTIONS	752,765 SQ FT	10,754 SQ FT

Source: CoStar (2023); AND London

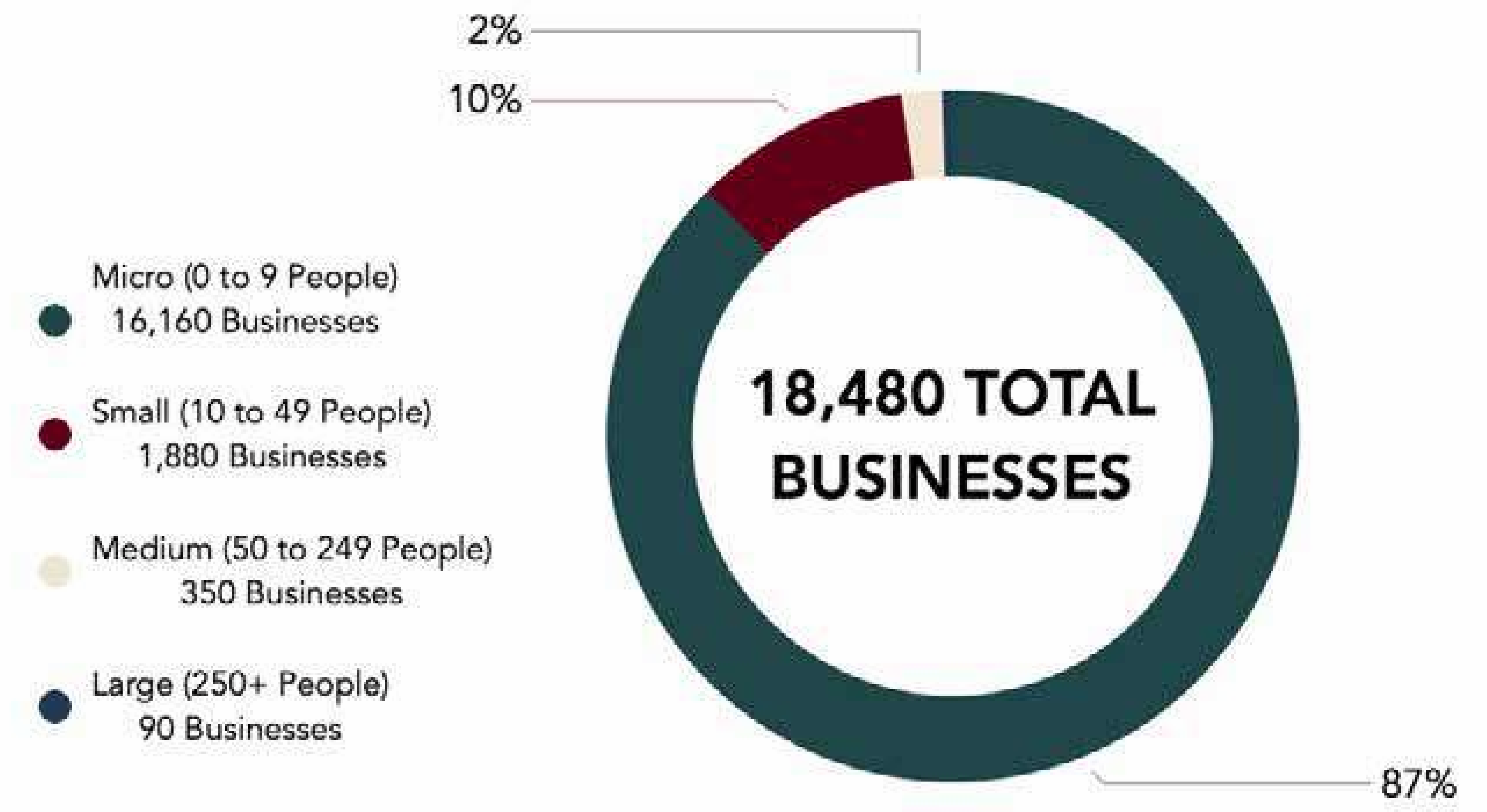
The Bristol business community by enterprise reveals that 86.5% of businesses are micro with 1 to 9 employees, and 11% are small businesses with 10 to 49 employees. The Local authorities' base of medium businesses with 50 to 249 employees stands at 2%, and only 0.5% of businesses are defined as large businesses with more than 250 employees.

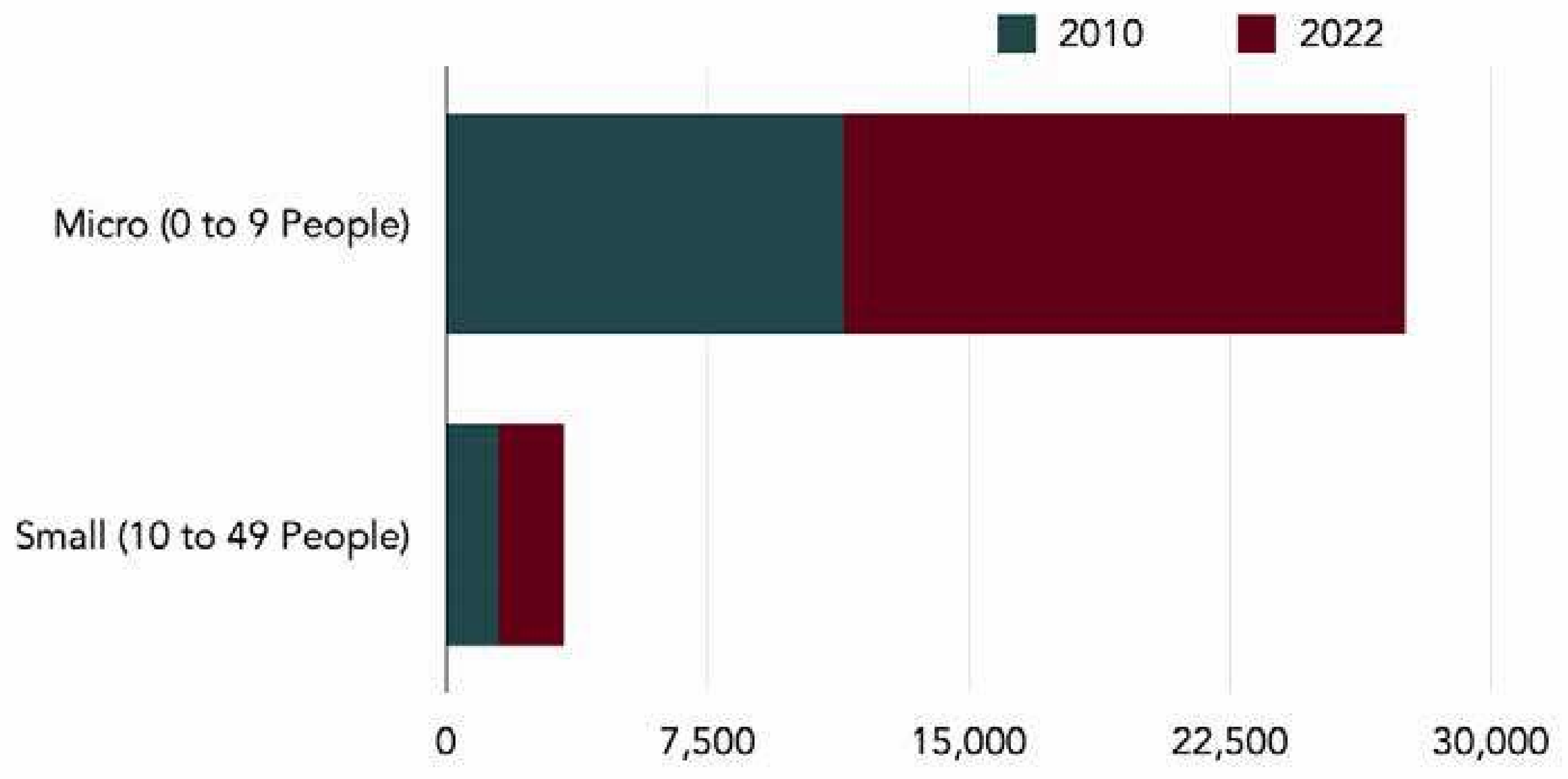
The Bristol business community employs more than 291,000 people and generates £13.862 billion (£13862 million) in Gross Value Added (GVA) to the economy each year (2015 data).

This contributes 11% to South West England's total GVA ranking as the largest GVA (1st) amongst the 37 South West local authorities.

In 2021, Bristol is ranked 1st in terms of employment counts in the regional economy compared with other local authorities in South West at 291,000 jobs. The percentage of small firms in Bristol (11%) is slightly higher than the average for South West (9.3%) and the wider UK average (8.6%).

As small enterprises continue to grow in numbers, Bristol has experienced a growth of larger firms, rising by 81.8% between 2010 and 2022, as compared to the growth in South West by 26.67% and the UK by 22.40%.





BUSINESS COMMUNITY

Source: ONS (2023); AND Londonn

Bristol has a thriving and diverse economy with much of this based on the seaport and the historical trading commodities. Key industries include the aerospace industry with major global companies including BAE Systems, Airbus and Rolls-Royce, all based at Filton in renowned world class cluster of excellence and business innovation.

In recent years as the global economy transforms Bristol has been at the forefront of emerging sectors such as low carbon energy sector, green industries and the advanced manufacturing sectors which has boosted industrial demand particularly for best in class and future proofed space.

This expertise, together with digital skills and high- speed data infrastructure has created a city that is forward thinking and at the forefront of business innovation. In the wider creative and cultural sector business with thousands of creative businesses within the City with major firms such as Fat Media.

The City is also renowned as a film and tv production hot spot with companies such as Aardman, Pre-construct and the Sun and Moon studios with a particular specialism in animation and CGI.

Aardman Headquarters

BUSINESS COMMUNITY

Nearby areas such as Temple Quarter will transform over 130 hectares of brownfield land over the next 25 years into a series of thriving, well-connected mixed-use communities. The regeneration of the area will deliver new homes in a mix of types and tenures and 22,000 new jobs will be created, bringing inclusive economic growth.

The new University of Bristol Enterprise Campus will bring cutting-edge innovation, education, and skills to the area, boosting Bristol's reputation as a centre of knowledge and enabling world-leading research and development.

Our anaylsis of the market within the study area demonstrated that there is minimal growth coming forward in light industrial and maker space inventory over the next 24 month period which revealed only a small pipeline of delivery during this time.

Wider regeneration of the area and transforming and intensifying of brownfield land without the co-locating of maker uses incorporated into these schemes has demonstrated that there is a lack of fit for purpose space for small crafts businesses and light industrial businesses and is therefore at a premium.

It would appear that there is a miss match in the local inventory of small spaces and move on space that builds on the excellent start up and incubator spaces that has helped to drive growth and opportunity in the sector.

LOCAL CONTEXT – BRISTOL TEMPLE QUARTER

Bristol has a strong heritage of maker spaces and studios designed to meet the needs of the areas thriving maker and artist communities, spaces such as Old Market Manor, Bristol Hackspace, the Factory and In Bristol Studios provide an array of different spaces to meet the needs of the local freelance, start-up and small business community.

Much of the space is full and our research revealed there was very limited space for new entrants into the sector. Detailed below are three of the most important:

OLD MARKET MANOR

https://www.oldmarketmanor.com/about

No Spaces Available.

Old Market Manor is a 7,000 S q ft, factory situated in the Old Market area of St Philips with a focus on carpentry and joinery sectors. The space is rented out to local businesses and freelancers in Bristol providing affordable space for makers and contains a mix of maker and creative spaces, machinery for hire. furniture workshops and shared jewellery making studios operated through a membership system.

BRISTOL HACKSPACE

https://bristolhackspace.org

No Spaces Available.

Bristol Hackspace is a community of people who run the workshop and creative space collectively. The space is designed as a place for people to share ideas, knowledge, and tools, and to work on projects in a collaborative and supportive environment. The venture is volunteer run on a not-for-profit basis that aims to promote creativity, innovation, and collaboration within the local community and is 100% led by the membership and entirely funded though membership fees and donations.

IN BRISTOL

https://inbristol.org

No Spaces Available.

Is a space for artist / makers who work across multiple disciplines in a space that focuses on providing a collaborative working environment and promoting, skill sharing and participation in the wider arts, creative and maker scenes in Bristol. The space offer's affordable studio space with shared access to professional tools and machinery along with business support, mentoring and opportunities to develop and expand creative practice. The space also runs a series of events and activities for the wider community.

MAKER SPACES

OLD MARKET MANOR

BRISTOL HACKSPACE

IN BRISTOL

MAKER SPACES

CREATIVE WORKSPACES

PAINTWORKS

Arno's Vale, Bristol

7.80% of Spaces Available.

A distinctive mix of creative tenants, exhibition/event space and café/ bar, live/work spaces, studios and residential lofts in converted industrial buildings

TEMPLE STUDIOS

Temple Campus, Temple Gate, Redcliffe, Bristol BS1 6QA

3.30% of Spaces Available.

Temple Studios is a social hub which offers unique & flexible work space at the heart of Bristol, UK, for creative and tech businesses.

ENGINE SHED

Engine Shed, Station Approach, Temple Meads, Bristol, BS1 6QH

No Spaces Available.

An innovation hub where businesses, entrepreneurs, academics and corporates collaborate, including a business lounge and co-working and collaboration spaces

FREESTONE STUDIOS

Freestone Lane, St Philips, Bristol. BS2 0QN

No Spaces Available.

10,000sqft of light industrial workspaces in St Philips, managed by Meanwhile Creative, hosted in a meanwhile use building

RUNWAY EAST

1 Victoria St, Redcliffe, Bristol BS1 6AA

No vacancy information available

Coworking and flexible workspace provided as customisable office space and including shared amenities including onsite cafe

BRISTOL SPACEWORKS

Multiple Locations

No vacancy information available

An independent social enterprise offering affordable workspaces to businesses including artist workshops and creative studios

CREATIVE WORKSPACES

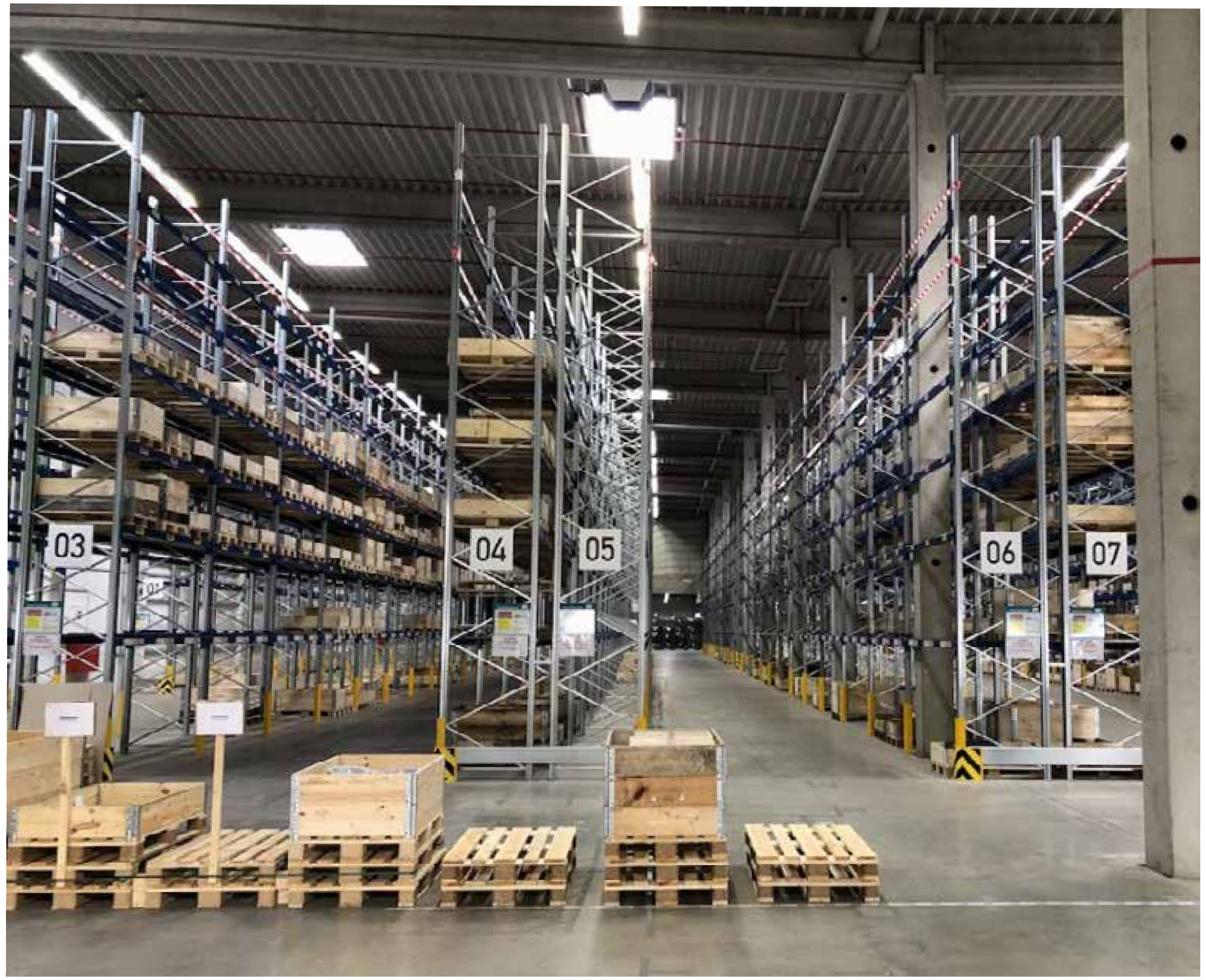
04

COMMERCIAL STRATEGY

The purpose of the commercial strategy has been to review the exising commercial proposals for the scheme, and in consideration of the data that showed leasing activity and uptake and demand of commercial typologies, make informed recommendations for how to deliver an optimised commercial layout to deliver fit for purpose space that meets local market requirements for modern flexible space.

In conversation with C-Squared, a local agent with deep understanding of the area and its strengths and constraints as an industrial location, they noted that the congestion at peak times (and frequently outside of this) make the site less desirable for industrial uses. The road network in St Philips itself is poor, and height restrictions due to presence of rail bridges deem a number of access routes unsuitable for modern day HGV's, preventing the frequent and fast access required by industrial space users, to perform heavy goods deliveries and vehicle movement.

Another factor to note is that industrial uses require large yard space allocation and ground floor square footage to the scale that is not available at this particular location. A growing uncertainty from occupiers over the future of St Philips as a 'long term' industrial location, undergoing rapid and well publicised change (A university campus, residential uses, new schooling and mixed use developments including leisure), it is unlikely that industrial occupiers would take the risk on a space that cannot provide expansion and future proofed growth.



STRENGTHS VS CONSTRAINTS FOR INDUSTRIAL USES

CREATING THE COMMERCIAL OFFER

- "MOVE ON" SPACE
- MODERN, HIGH QUALITY STATE OF THE ART
- FLEXIBLE + ADAPTABLE
- SHARED WORKSHOPS
- A COMMUNITY WITH CURATED EVENTS + ACTIVITIES
- SMALL + MICRO STUDIOS
- A PLACE TO GROW + THRIVE
- FUTURE PROOFED
- A MIX OF
  - LIGHT INDUSTRIAL / MAKER
  - HYBRID SPACES
- FOOTFALL + COMMUNITY
- CONNECTED + ACCESSIBLE

The vision for New Henry Street is to create an exemplar maker campus for Bristol that sets a new precedent for local makers and craft businesses that require high quality and well connected maker space.

Our demand assessment showed there was real demand for high quality and fit for purpose units, and providing a significant ground floor quantum to support a network of collaborative businesses, the maker campus will seek to attract Bristol's most exciting creative businesses located on a state of the art maker street that encourages businesses of all sizes to grow and thrive.

The scheme will promote collaboration and community, providing an array of amenities designed to make the campus an interesting, healthy and visually stimulating place to visit and work.

Providing maker spaces that caters to the growing (and underprovided) demand, specifically of units between 250 -2,000sqft, these types of light industrial users typically do not require yard space and are less road intensive.

Providing space for makers and craft businesses fosters community, and enhances the area and hyper local economy, where students can access a business network for developing new skillsets and collaborative opportunities. Creating space for these commercial entites generates a higher density employment, particularly for young people than tradition B8 users.

COMMERCIAL STRATEGY

The maker campus will create a mix of unit sizes designed to provide space for various business sizes and sectors at different stages of business growth and lifecycle, designed specifically for start-ups and micro businesses that offer a range of shared facilities and services.

The workshops are designed as a concept so that businesses can grow and move on within the campus. The scheme has units designed especially for small businesses, ranging between 250 and 2,000 sq ft.

The cluster of fit for purpose space is designed to create an innovative ecosystem for maker businesses seeking premium commercial space within the industrial sector at various sizes and specifications, and in close proximity to community amenities and attractive public realm.

The units will attract businesses from various sectors due to the considered design and specification that has gone into the campus development.

AN EXEMPLAR MAKER CAMPUS

1,744sqm GIA of Commercial Floorspace

75-80 Jobs Created

Flexible E Class Use

£14.7k per annum Business Rates Generated

New Businesses Accom-modated

Local Creative Ecosystem

Flexible Unit Sizes

Uses promote Bristol Council's priority areas for employment

Robust industrial facades

Ground Floor Units

Spaces designed for SME businesses

Activated public realm providing safer pedestrian access

COMMERCIAL OVERVIEW INFOGRAPHIC


NEW HENRY

The ground floor maker spaces will provide robust, open studios positioned alongside New Henry Street that will create an energetic and dynamic route connecting Sussex Street to the former Bristol-Bath railway track

Providing adequate space for signage and bright and welcoming frontages will allow members of the community to see into the units and for the makers to operate a hybrid function of making and retailing their goods.

The maker spaces will feature flexible layouts, well-planned and thought out column grids and generous floor-to-ceiling heights that facilitate a variety of light industrial activities that can be combined with retail/showroom usage.

Creating this flexible use will ensure that the ground floor workshops remain industrial in nature whilst also serving the residential community as an added amenity, and providing activity and interest for the entire development.

A HYBRID MAKER / RETAIL OFFERING

SIGNIFICANT EMPLOYMENT BENEFITS

1,919 sqm of employment supporting uses (including the maker spaces, flexible commercial units, food store and community space

65 to 75 full time jobs created

Student accommodation adding a further 10 jobs on top of this.

The proposed ground floor uses will provide significant employment benefits.

For a further breakdown of this, please refer to the Economic Benefits Assessment prepared by Ekosgen and the Planning Statement prepared by Rapleys.

1,016 sqm of dedicated Class E(g)(iii) maker space

37 jobs created by maker space (greatly exceeds the 20-25 estimated jobs currently on site)

A CASE STUDY: BUILDING BLOQS

Building Bloqs is a brand new state of the art 32,000 sqft workshop and maker space designed by 5th Studio architects. The facility has been built as part of the Meridian Water regeneration project in Enfield where the scheme's commercial component will focus on makers, light industrial and the creative and cultural industries. .

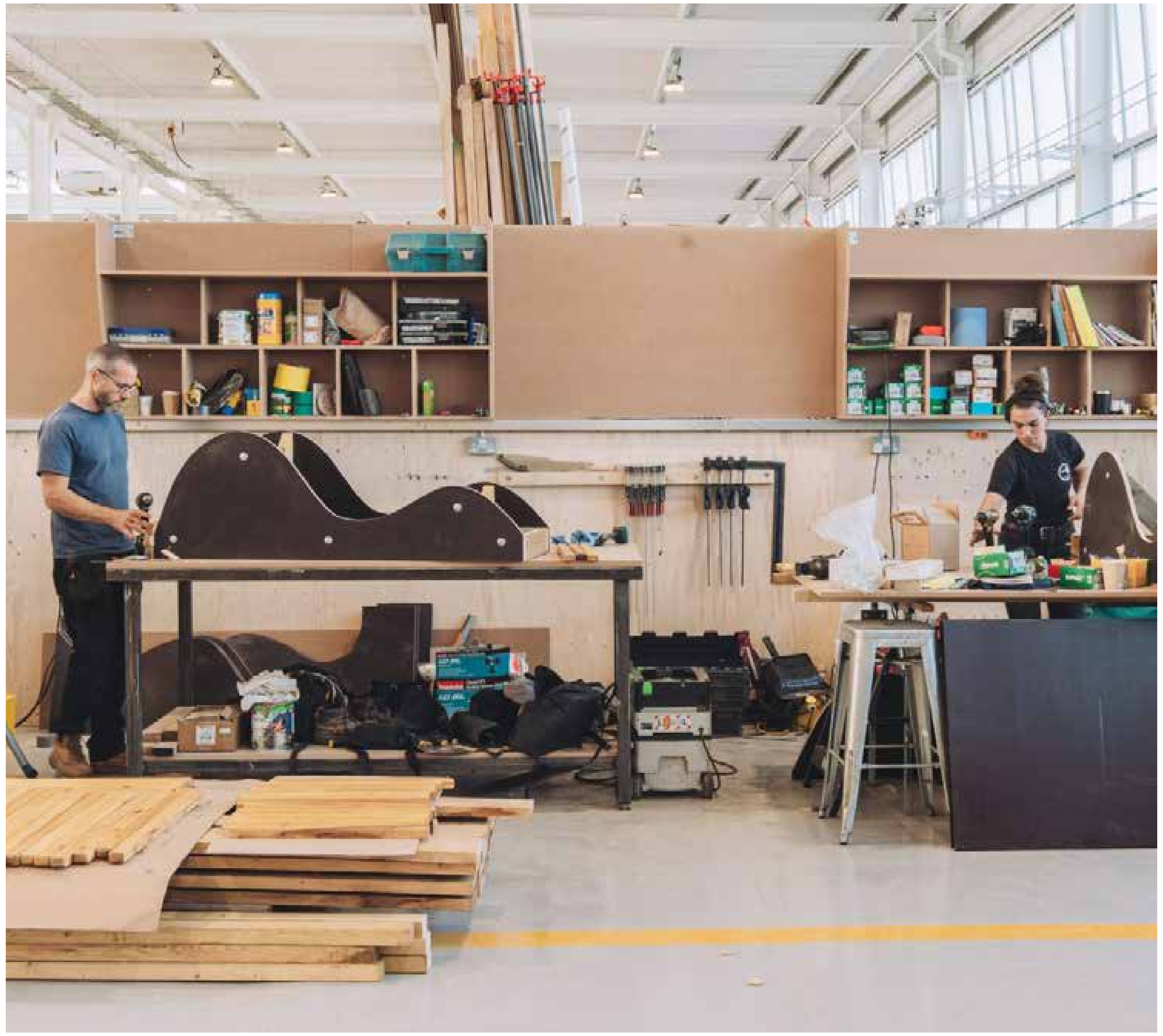
Bloqs is a brand-new facility providing professional makers and maker businesses with affordable workshop space, access to state-of-the-art equipment and the opportunity to become part of a supportive community of fellow makers.

Building Bloqs offers an ambitious new model for open-access working, economising space and facilities on a scale never done before, simultaneously maximising the scope of the businesses, organisations and individuals that use it. The space is used by a range of start-up's, small businesses and freelancers from across the sub region.

The space includes a diversity of facilities for makers including carpentry and joinery, metalworking, fabric & sewing, engineering, spray finishing, as well as training resources and services such as courses, classes and hireable meeting rooms.

Users have access to £1.3 million-worth of light industrial equipment, usually beyond the reach of most new businesses, including: industrial mills, lathes, sanders, saws, 5D CNC routers, laser cutting, 3D printers, spray booths and specialist sewing machinery.

The space includes a café and a tool shop. The space hosts regular events and open days and has become renowned as a location for the maker community to gather and collaborate.



A CASE STUDY: BUILDING BLOQS

A CASE STUDY: BLACKHORSE WORKSHOP

A CASE STUDY: BLACKHORSE WORKSHOP

Blackhorse Workshop is an open-access community workshop in London, which specialises in wood and metal processes, with affordable access to tools, space, and on-site technical expertise.

Blackhorse workshop seeks to build on the area's rich heritage of craft and industrial production, the workshop's mission is 'to become a socially pioneering world class centre for making'. Machinery support is on hand from highly skilled technicians, and members or visitors can build or fix anything from broken chairs to theatrical sets, bikes and furniture. It is also a place to grow a startup with the support of industry expertise and a community of makers.

The workshop is a place for both working and learning, for everyone from independent practitioners, individual hobbyists through to sole traders and small businesses. It offers a wide range of equipment and a regular programme of classes and activities. A café-bakery and brewery are open to the public, space is offered for hire, and a monthly food and maker market.

The project was supported by Create London and the Greater London Authority and the London Borough of Waltham Forest.

09

SPATIAL BRIEF

Unit Sizes

We recommend units ranging from 250 sq ft up to 2,500 sq ft.

We recommend that most units are of a smaller scale, ranging from microunits of 250 sq ft up to 1,000 sq ft in size.

We think there is tremendous demand locally for micro spaces, particularly if the development can offer shared facilities as part of the wider offer.

We do not think there is much demand for 2,500 sq ft to 5,000 sqft.

Distribution of units

We agree with the current approach.

Unit Types by Enterprise

Micro Studio Unit: 250 - 500 sq ft
Type of Business Occupier: All start-up's from any sector/freelancers

Small Studio / Factory: 500 - 1,500 sq ft
Type of Business Occupier: Start-up/micro / small businesses from the creative, cultural, maker and light industrial sectors

Medium Studio / Factory: 1,500 - 2,500 sq ft
Type of Business Occupier: Small business type enterprises from the creative, cultural, maker and light industrial sectors

Configuration

Typical market demand is for units that are boxy or rectangular - occupiers tend not to like strangely configured units unless they come as part of a heritage building.

Keeping the units as flexible as possible is critical, and ensuring enough entrances along the façade is vital to provide the best chance to lease all of the space.

Ensuring that units are not too deep is critical - especially if units have to be carved into small units, which can create spaces that look like corridors and are very difficult to lease.

Consideration should always be given to making them boxy or rectangular shaped spaces in any size format.

How to create genuine flexibility

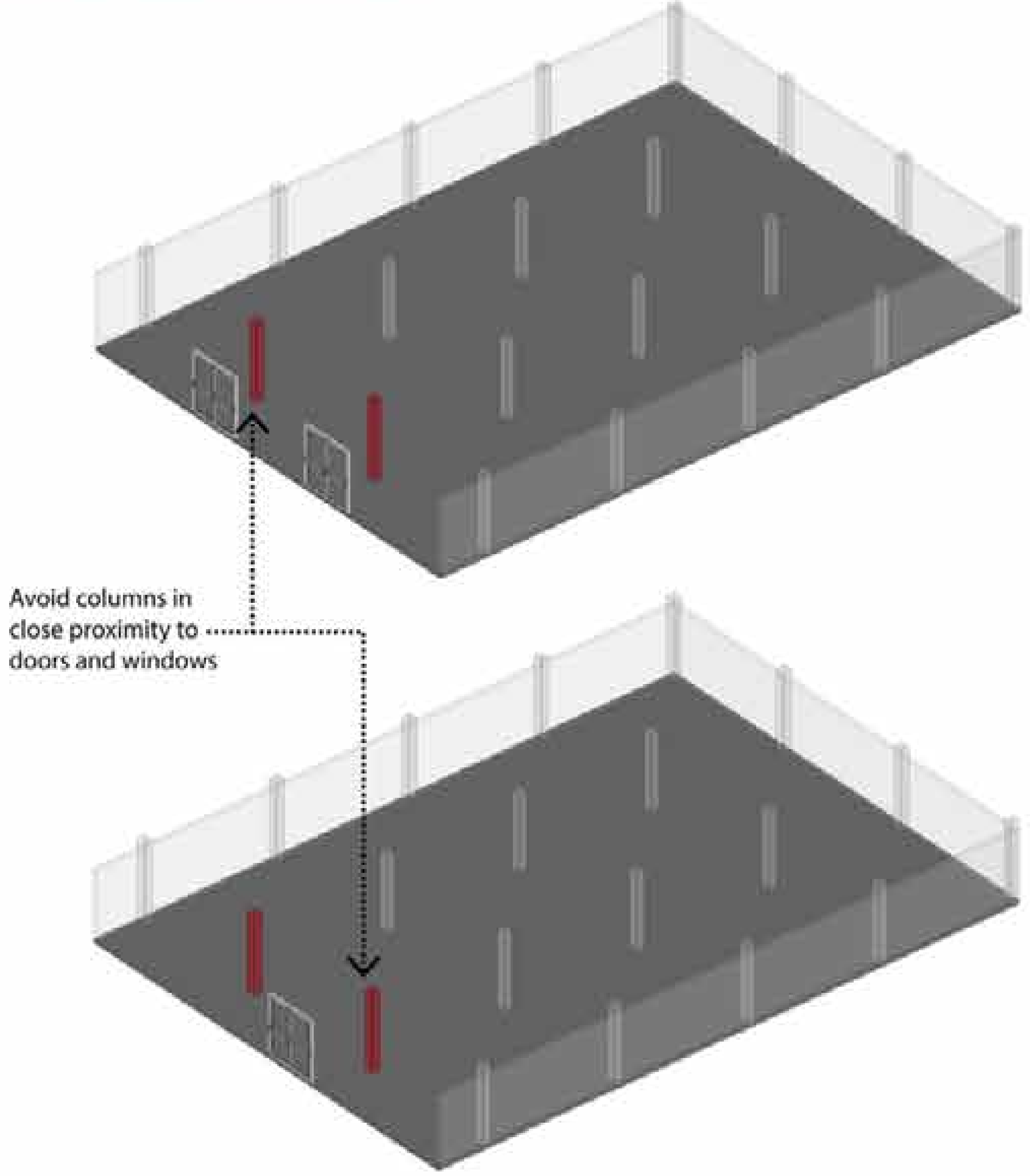
Adding two double doors to each larger ground floor unit will enable these units to split down further in the future if necessary. In addition, tenants will not complain about having two entrance doors to a unit.

Including extra doors at the design stage is much easier than retrofitting in the future/altering planning.

Column Grid

It is essential to try and ensure a well-designed column grid and, if viable, try to transfer as much as possible on the ground floor.

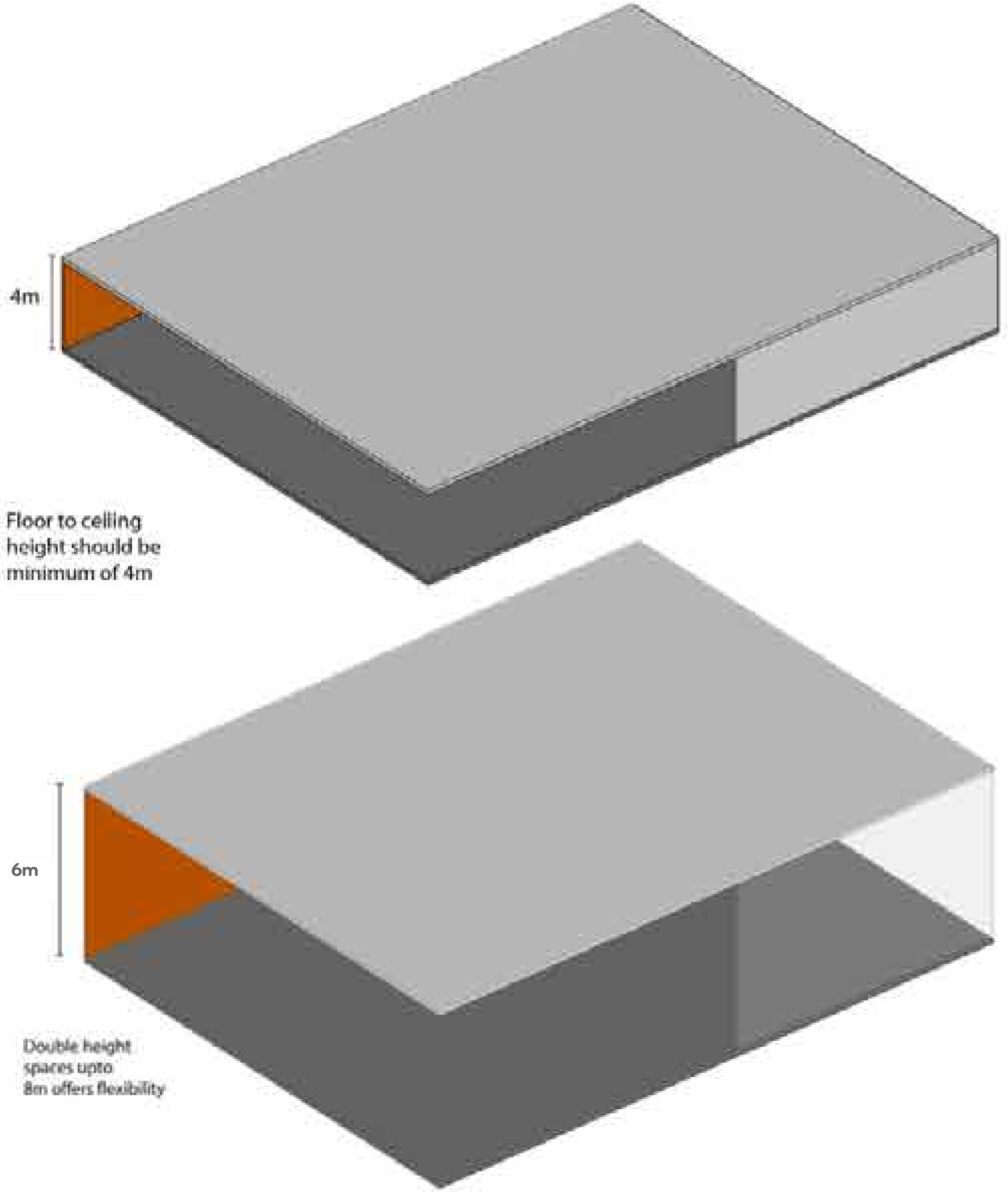
Where possible, try to avoid columns close to front doors and windows, as this creates space that is more difficult to lease and likely to reduce rent levels.



SPATIAL BRIEF

Floor to Ceiling Heights

The ground level floor-to-ceiling heights should be between 4.0m and 6.0m. Genuine double-height will be popular as there is a lack of new flexible space with these types of proportions in the wider area. Any first-floor space should be 4.0 metres floor to ceiling height if possible.



Structural Floor Loadings

The slabs to the units should be designed for the following loading allowances as a minimum, or as per BS EN 1991-1-1 and the UK National Annex, where higher. Specialist advice to be taken due to the unique nature of the project:

- Plant areas: 7.5kN/m2
- Staff only areas: 3.0kN/m2
- Workshop floor/maker space area: 20kN/m2

Entrances

To make the units as flexible as possible, we recommend each unit is fitted with at least one double goods entrance door, regardless of the proposed use class. This will make the units lettable to the broadest pool of potential end occupiers.

The entrance doors should be able to incorporate a pallet delivery as a minimum door width.

Fit Out Specification

Please see the attached appendix for Enhanced Shell & Core and Plug & Play specifications.

Mezzanine Space

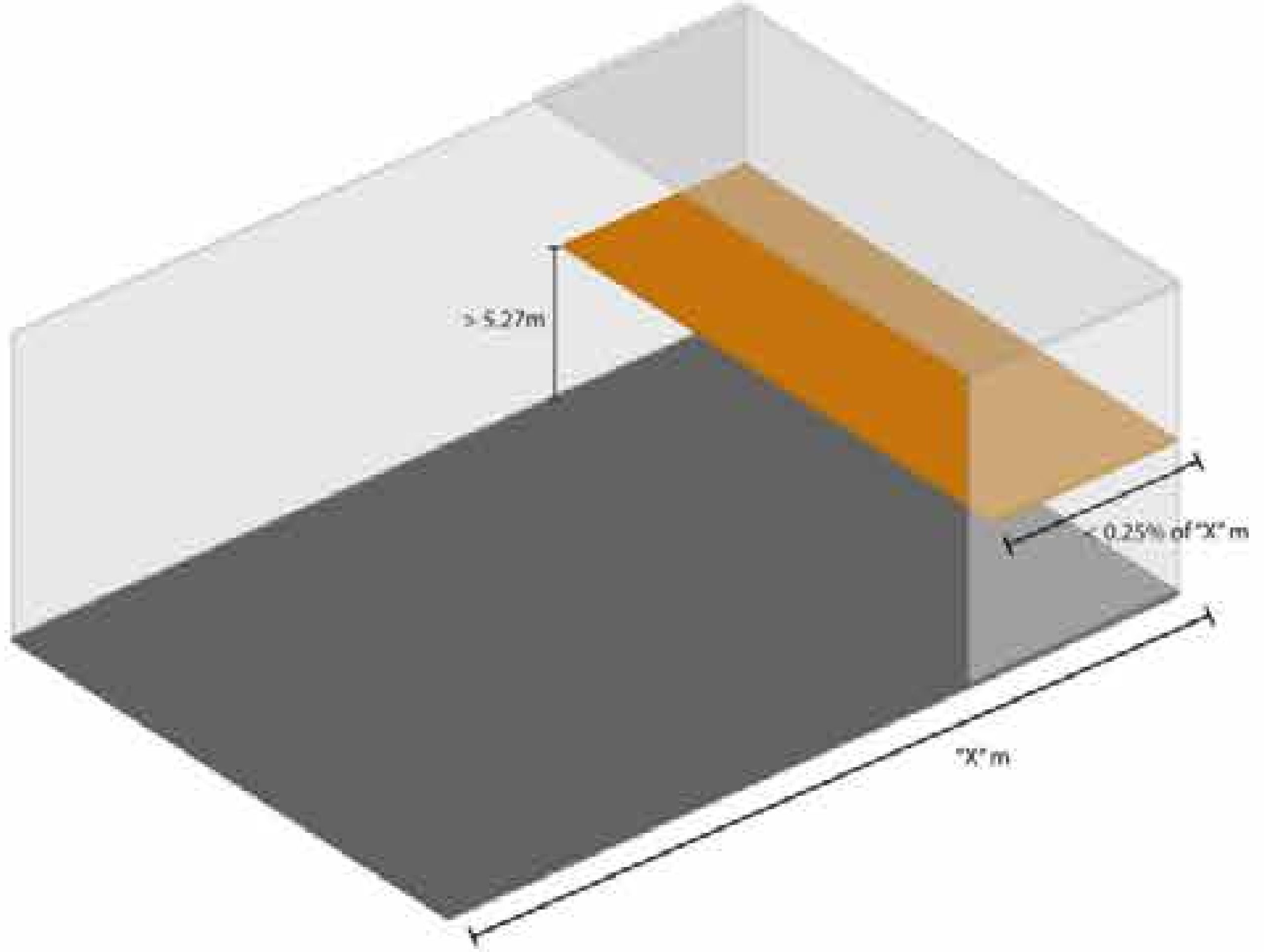
The only mezzanine permanently built into the development can be charged as rentable floor space.

In most instances, the mezzanine should not have more than 25% coverage of the total ground floor area.

Mezzanines should be located towards the back of units or along the side.

Maximising the double-height floor space on the ground floor of units is essential and making this as flexible as possible for incoming tenants.

The minimum level to the mezzanine is 5.27 meters, but this is the very minimum and will be on the low side – a bit more generosity of volume is preferred and recommended if possible

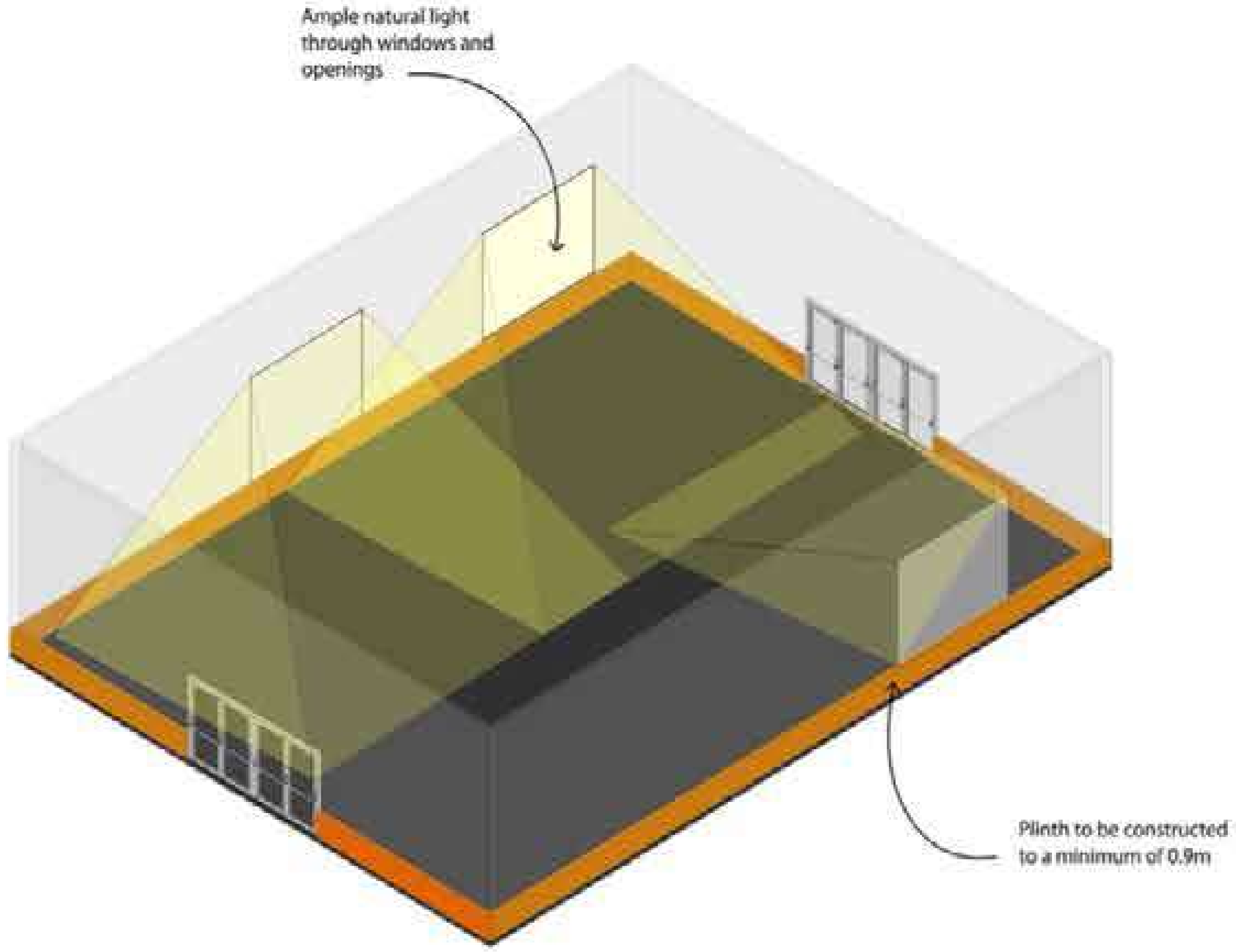


SPATIAL BRIEF

Façades and Frontages

We recommend adopting a robust industrial façade for this location - regardless of the use that goes into the individual building. By a robust façade, we mean a unit that still has strong natural light and a decent expanseof glass.

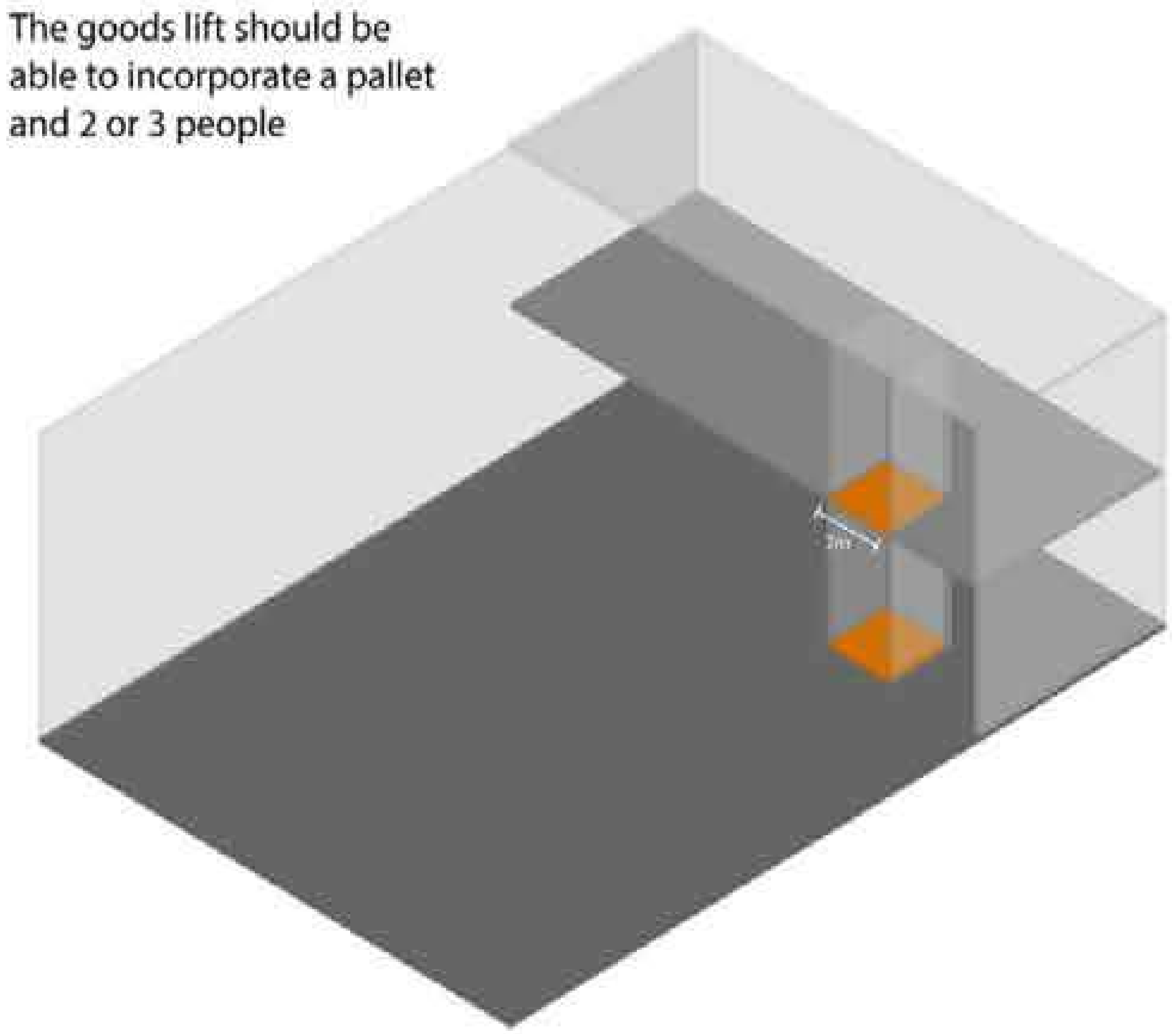
Glass boxes at the base of new homes are not very popular in cooler urban markets. We feel the treatment should be a plinth or a kicker board up to waist height to make the units have a more industrial feel and toughness to cope
with all potential occupiers.



Goods Lifts

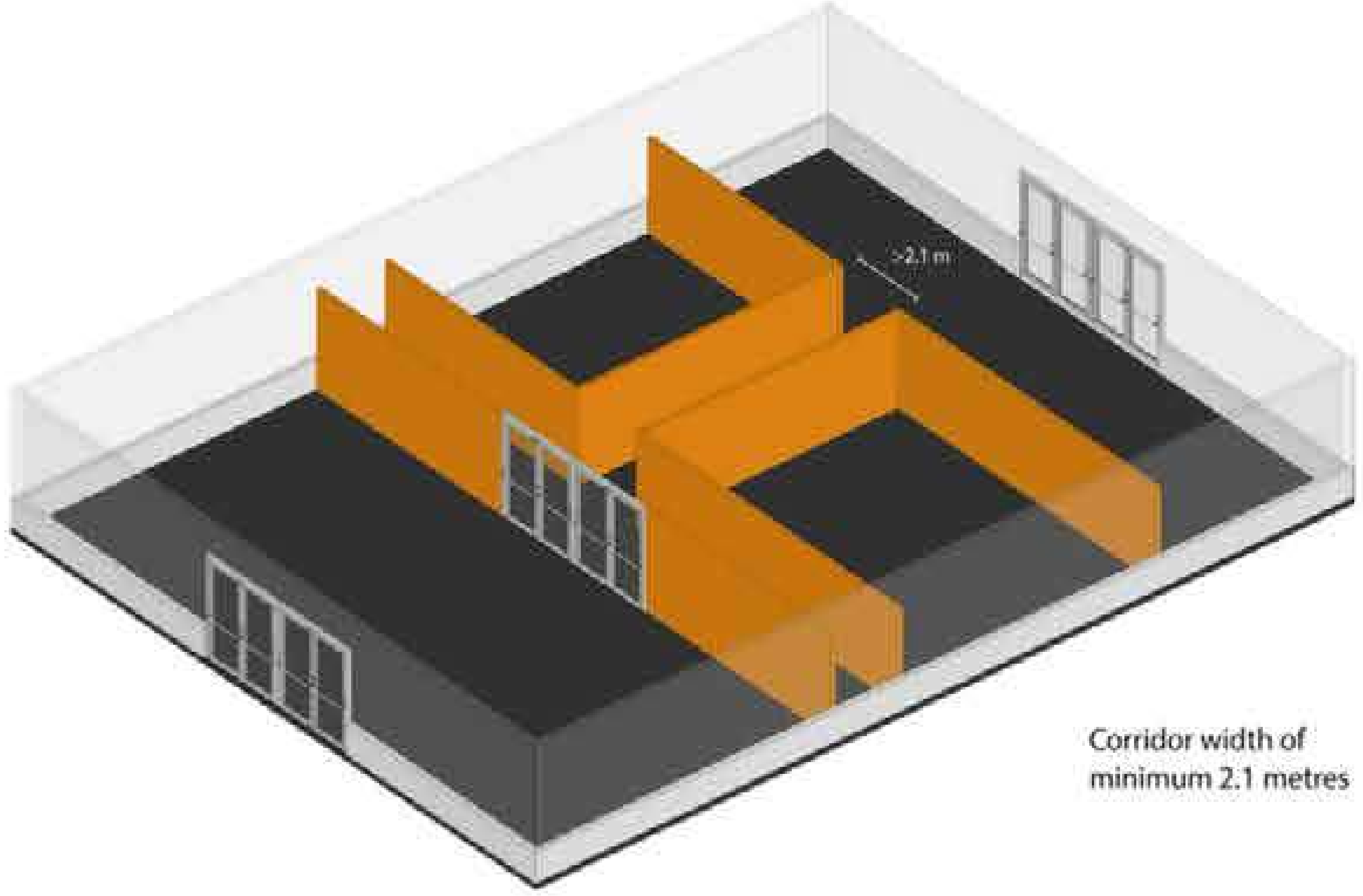
A small goods lift is recommended for 1st-floor spaces even if the units are unlikely to be maker space – this will prove the space for various uses in the future. Goods lifts are also more reliable and create a nice design feature.

The goods lift should be able to incorporate a pallet and 2 or 3 people – both Koni and Schindler offer more miniature goods lifts specs – don't use Otis.



Corridor Width

Corridor widths should be around 2.1 meters wide to accommodate a small pallet truck and enable someone to walk past at the same time.



SPATIAL BRIEF

Sustainability

Tenants are increasingly interested in ensuring a building is highly sustainable and want a building to meet their ESG principles. This means tenants want such factors included within the design of the building and the agreements they will sign.

This will include the building design meeting standards such as BREEM and more practical issues such as openable windows to provide natural ventilation
into spaces.

All ground floor commercial areas are to be provided with louvres at a high level to allow intake/exhaust ducts to be connected at the back. The sizes and locations shall be determined based on the use of the spaces under the fit-out
scope of works.

Occupiers increasingly want to sign green leases that commit to continuous carbon reduction and increasing the sustainability of buildings.

Signage and Wayfinding

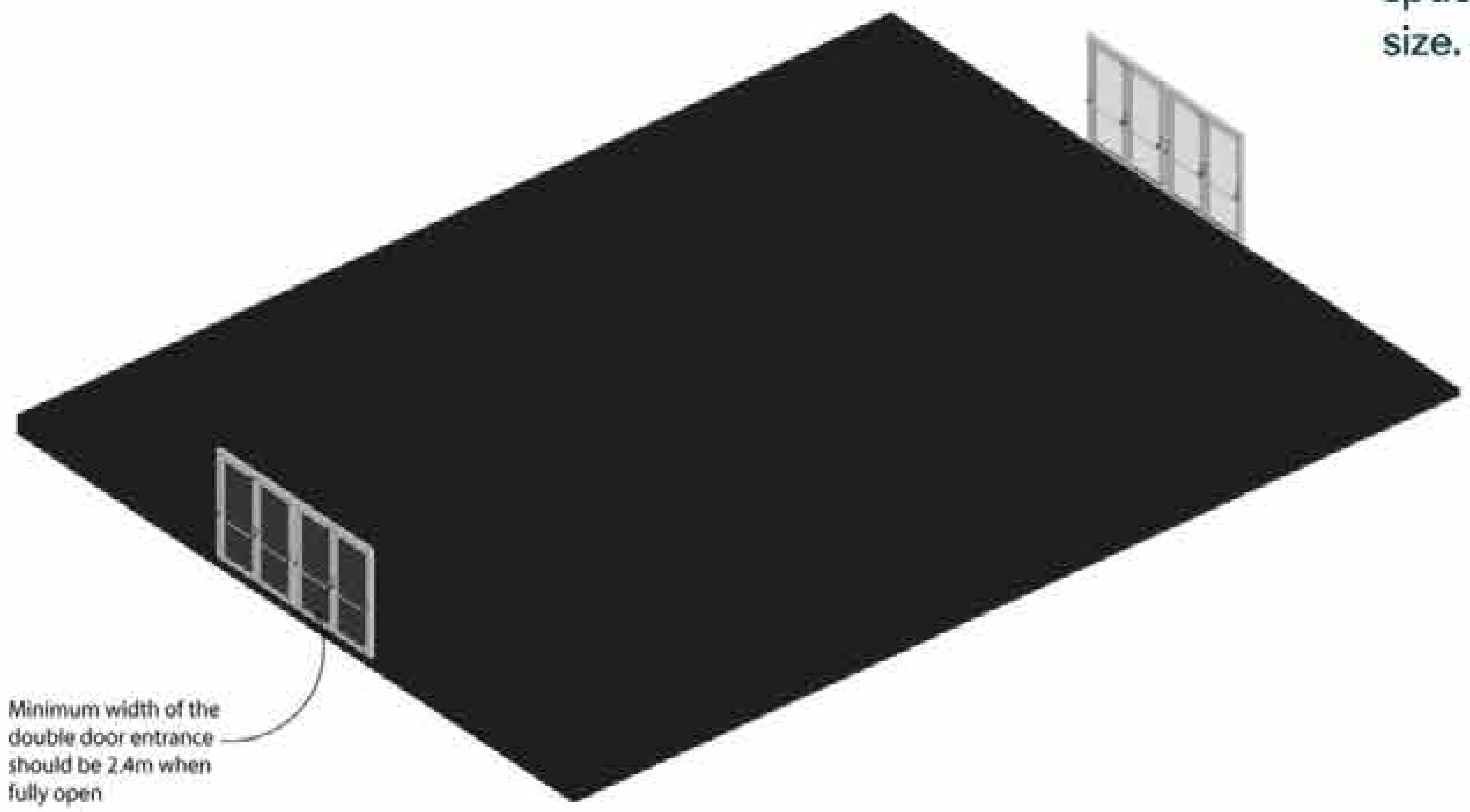
Good quality signage opportunities for each unit using a combination of signs and boards. A wayfinding strategy for the whole site with a totem or board at key entrances to the site that displays company details and locations.

Access and Loading

Good access and loading for each unit are critical, and we would adopt the following for each unit:

Small units 250 sq ft up to 1,000 sq ft:

- A distance from the back of the van to the front door of the unit of no more
- than 30 meters.
- 1,000 sq ft upwards:
- Preferably direct access to the front door of the unit.



Shared Facilities

Workspace clusters, particularly those focusing on micro and small businesses, should have a raft of shared services and facilities.

This should include:

- Toilets and showers
- Locker facilities
- Accessible post box for each unit
- Cycle facilities, both long and short stay
- Meeting room to accommodate 8 to 10 people

The inclusion of a café is a major attraction for businesses and will positively impact the speed of leasing and rent achieved. A café space between 600 and 750 sq ft should suffice for this scheme size.

SPATIAL BRIEF

Taking into consideration the best case scenario Spatial Brief that we have presented above, AHMM have created an optimum commercial ground floor that encorporates units designed for maximum flexibility and suitable for a range of uses to provide a future proofed and fit for purpose commercial element of the

KEY

- CORE
- COMMON CORRIDOR
- RECEPTION
- MAKER SPACE (Class E(g)(iii))
- FLEXIBLE COMMERCIAL SPACE (Class E(b-g))
- SUPERMARKET / MAKER SPACE (Class E(g)(iii))
- ANCILLARY COMMUNITY SPACE
- BACK OF HOUSE

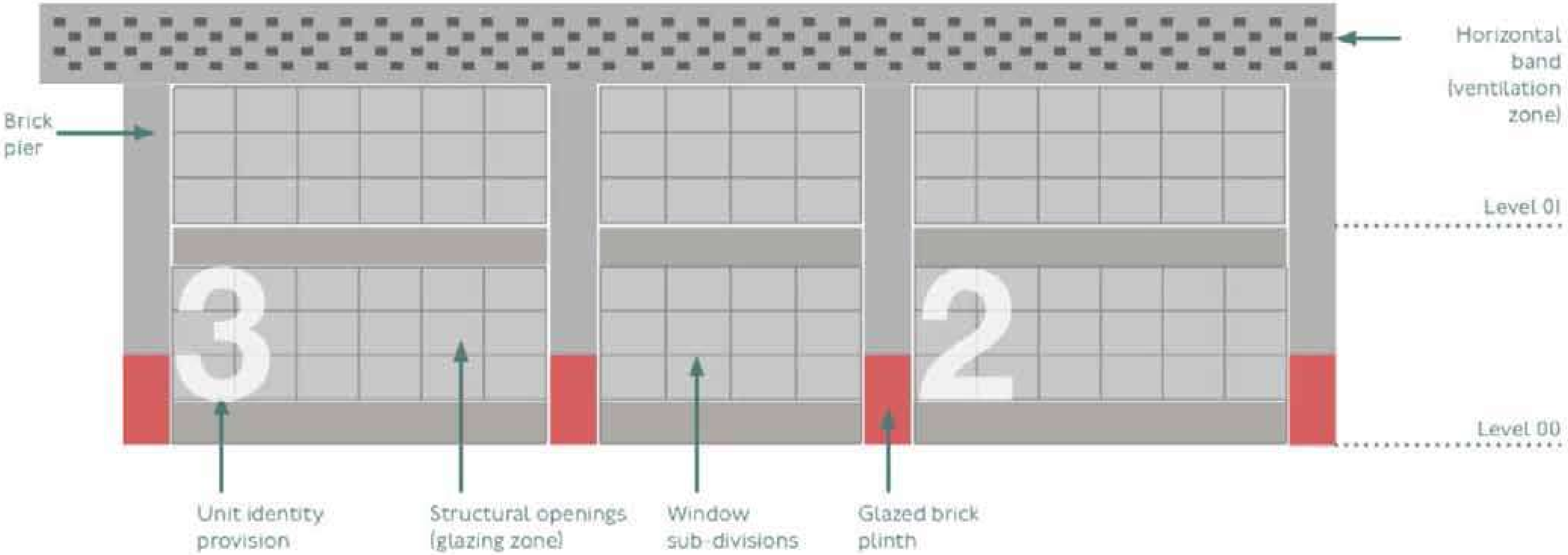
THE PROPOSALS

The commercial element of the scheme has been purposely designed with robust industrial style facades that combines natural light and the use of industrial grade materials, which creates an interesting façade that will appeal to a range of different occupiers. This type of design will work as a unit for makers, light industrial, show room and studio space who appreciate this type of aesthetic.

Creating an industrial feel to the façade first and foremost will cater to the maker uses as this will be the most likely occupier and use for the space when they are completed and ready to lease.

We felt that the industrial style, look and feel is also popular with a range of other potential uses who are very keen to be based within this design approach, and the configuration such units offer.

Most modern maker occupiers such furniture makers and upholsterers and many other forms of manufacturing rarely produce adverse odours however, the facades have been designed to accommodate extraction/ventilation if needed.



FACADES

TRANSPORT ACCESS

The application proposals include the provision of three loading bays around the site, for delivery and refuse collection. (More detail is set out in the Delivery and Service Vehicle Management Plan submitted).

i. A loading only bay on the east side of Kingsland Road;
ii. A loading only bay and a drop-off bay on the north side of Sussex Street;
iii. A loading only bay on the west side of Alfred Street;
iv. A dedicated maintenance bay on the west side of Alfred Street; and
v. A strategy for the management of planned plant maintenance access via New Henry Street.

26 secure cycle parking spaces are proposed around the site for visitors and employees for all land uses. These can be apportioned approximately as follows:

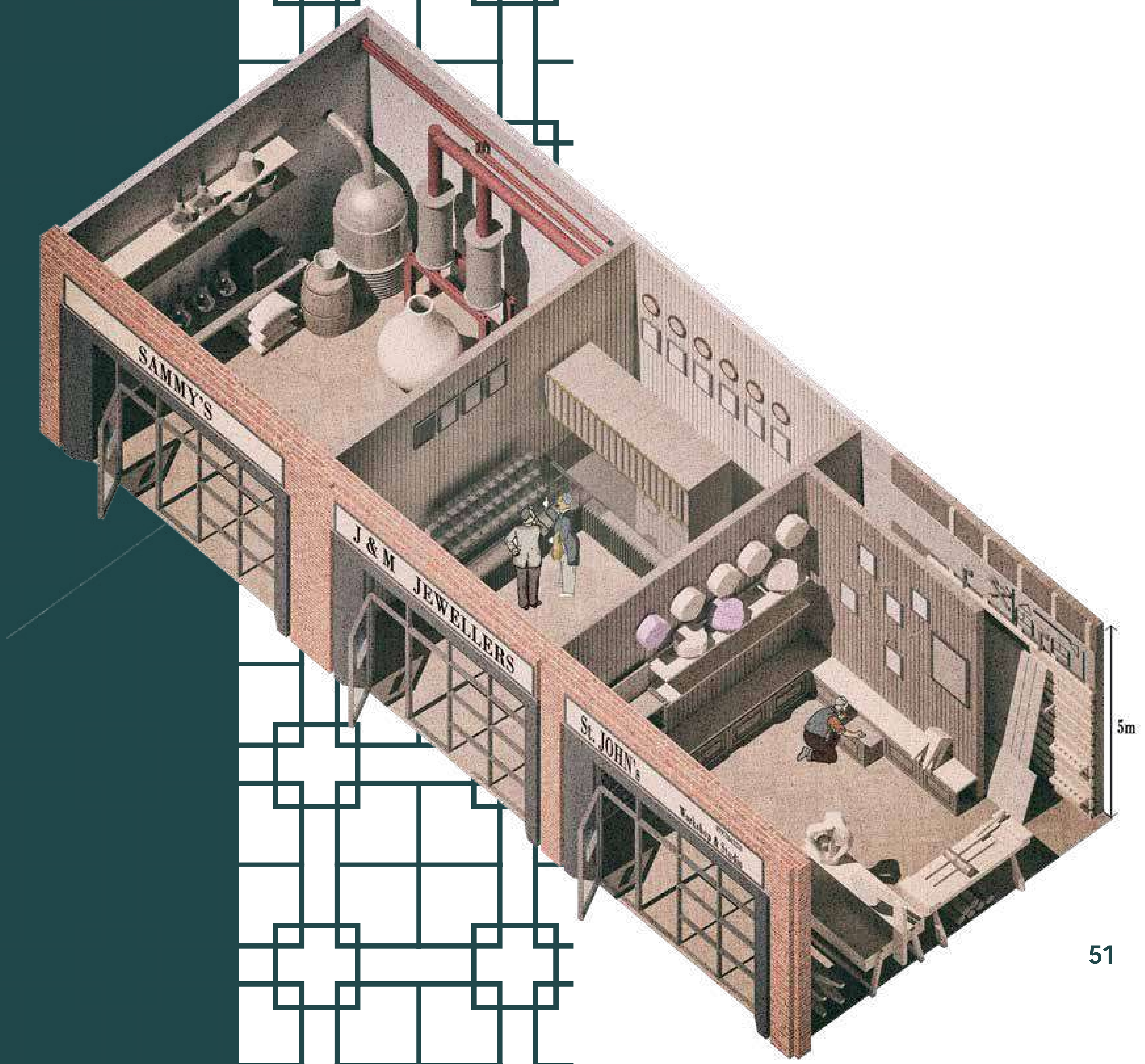
i. Maker space – 10 spaces
ii. Commercial space – 2 spaces
iii. Flexible supermarket/maker space – 8 spaces
iv. Community space – 6 spaces

07

WORKSPACE TYPOLOGIES

MAKER MEWS

- 100 sqm
- Hard wearing facade
- Double goods entrance door
- Plug and play specification
- Space for signage
- Ability to retail from the frontage
- Shared welfare and communal facilities

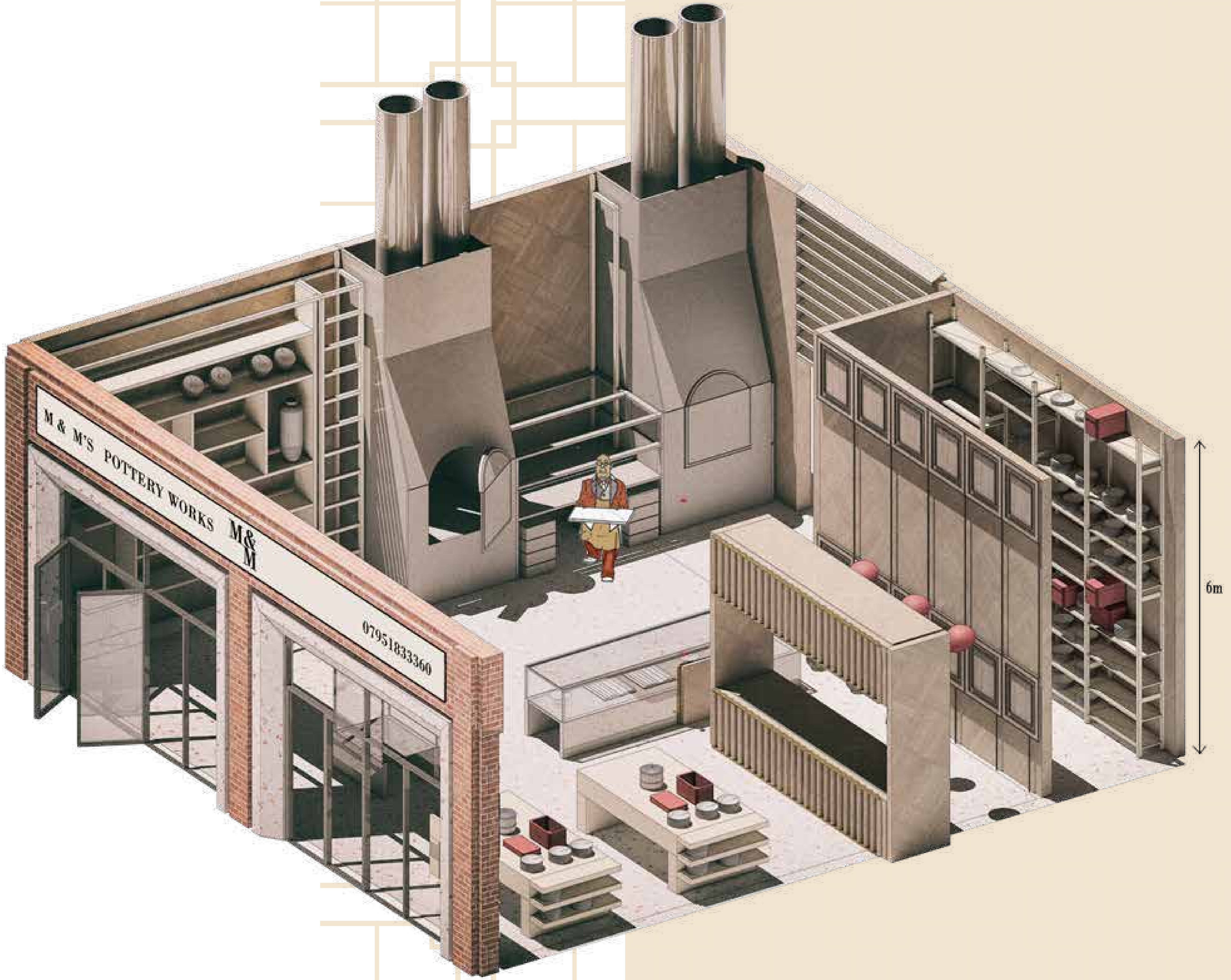


MICRO STUDIO

- 25 sqm
- 4 meters floor to ceiling
- Large entrance door
- Plug and play with M & E already in place
- Light filled space
- Space for 2 or 3 desks
- Signage opportunity
- Shared welfare and communal facilities

SMALL FACTORY

- Range of unit sizes 25 sqm up to 200 sqm in size
- Boxy / Rectangular Units
- Good natural light
- Robust industrial facades
- Any internal corridors should have a minimum width 2.5 meters
- Shared facilities such as reception, bathrooms, meeting rooms, breakout spaces
- Generous floor to ceiling min 4 meters
- Double goods entrance doors
- Front loading access required



MAKER CAMPUS

- Requirement 15,000 to 30,000 sq ft
- Loading bays suitable for large vehicle access
- Space broken down into smaller units based on demand
- Floor to ceiling height minimum 6 meters
- Boxy or rectangular configuration
- Reception area
- Commercial yard

PHOTOGRAPHY STUDIO

- Range of unit sizes 100 sqm up to 1000 sqm in size
- Generous floor to ceiling min 4 meters
- Boxy / Rectangular Units
- Good natural light
- Robust industrial facades
- Any internal corridors should have a minimum width 2.5 meters
- Shared facilities such as reception, bathrooms, meeting rooms, breakout spaces
- Double goods entrance doors
- Front loading access required

CREATIVE OFFICE

- 250 sqm
- 4 meters floor to ceiling height
- Light filled space
- Usable square or rectangular shape
- Openable or crittall windows
- Well designed column grid
- Large entrance doors
- Enhanced Shell & Core or Cat A

08

TYPICAL TENANTS

TYPICAL TENANTS

Start-up Micro Baker

Size requirements:
600 - 3,000 sq ft

Specification requirements:
- Production facilities
- Basic extraction
- Storage space
- Cooling if possible
- Loading bay directly outside unit

Ceramicist

Specification requirements:
250 - 500 sq ft

Specification requirements:
- Production area
- Desk space
- Storage space
- 24 hour access

Jewellery Maker

Specification requirements:
250 - 800 sq ft

Specification requirements:
- Work bench
- Storage area
- Fulfilment area
- Natural light if possible

Photography Studio

Size requirements:
500 to 1,000 sq ft

Specification requirements:
- Flexible space
- Natural light
- Goods lifts if above GF
- Green room
- Light and dark spaces

Design Studio

Size requirements:
500 to 2,000 sq ft

Specification requirements:
- Flexible space
- Production area
- Some office space
- Natural light
- Goods lifts if above GF

Furniture Production

Size requirements:
500 to 5,000 sq ft

Specification requirements:
- Production area
- Small office
- Storage
- Generous floor to ceiling heights
- Access to loading bay

TYPICAL TENANTS

10

MARKETING STRATEGY

Marketing Narrative

New Henry Street will need a great narrative to tell the story of the commercial offer, to build excitement about the development and the opportunities for workspace. The marketing of space is increasingly important and a key factor that businesses consider when choosing a new location.

We are certain that the demand for New Henry Street will mainly come from small makers and local independent creative businesses that are seeking new opportunities for fit for purpose light industrial space that genuinely fulfils their business function, and be part of a small business community.

The narrative should also talk about the creation of a unique new mixed-use community that enjoys a vibrant mix of residents and commercial, along with the incorporation of high-quality public realm and exciting amenities.

The narrative should also describe St Philips as a location for the emerging creative cluster and talk about how creative SMEs are increasingly choosing it as a business location.

Brand Identity & Narrative

It will be critical to develop an exciting brand identity and narrative for the development and create a unique identity for the scheme. We are finding that small businesses seeking new space want to be part of a story and feel a sense of belonging to a brand identity and a place. This is becoming much more important, particularly for creative businesses and start-ups.

A place-shaping narrative will be critical, and maker and creative businesses are keen to be part of a buzzy urban community rather than the usual industrial estates and unloved light industrial buildings without lift access or good natural light. The scheme presents the perfect opportunity to capitalise on this shift in requirements and demands.

The narrative should describe how the project will become a dynamic maker mews. It should also talk about the wider renaissance of this area of Bristol, focusing on key developments and important creative businesses and artist studios in the wider area.

We are finding that makers have a checklist of requirements when looking for new space which needs to be built into the scheme narrative. This will include facilities and services such as:

- The quality and configuration of the space
- The sustainability of the development
- Opportunities for signage for passing trade
- Calendar of events and activities
- Consumer profile

Key Messaging

It is our view that the key themes of the campaign should be:

- The redevelopment of key sites in Temple Quarter, and its growth as a business location
- A dynamic new creative business cluster
- A new place for start-ups and small business
- Quality of space and different sized units

Events & Activations

As part of the marketing strategy a series of events and activations to engage potential tenants will be important, to get these businesses on-site to see the full potential of the development and commercial spaces. Consideration should be given to using local influencers from the creative business community in the marketing strategy.

Website

It will be critical to create a purpose-built professional website and not just buy one off-the-shelf. The website and social media will be the first points of engagement for many potential tenants, and we need to demonstrate the quality of the product. The website should have sufficient capacity to incorporate CGI / video footage, and be as exciting and interactive as possible.

The website should contain content including details about the scheme, including site plans of the unit sizes, specifications, the wider narrative about the visual identity, and the various local amenities. The site will also need to include data and details about the consumer profile of the area and the vision for the regeneration of the area.

MARKETING STRATEGY

Social Media

It will be important to have social media channels for the development and to build a loyal following of interested parties to ensure the maker spaces and studios are in demand.

Twitter (now known as X) as a medium is not always the most positive forum for engaging people, but is still a good place to communicate with the type of businesses we want to attract and to communicate with local people about the scheme. Instagram is a much more positive forum, and by utilising high-quality photography and CGI's of the scheme we will attract a decent following and provide a platform to share our key messaging.

Where possible we should again use local influencers and pre-let tenants to lead the messaging, as this is much more likely to cut through and reach the audience we need to communicate with.

PR

It will be important to try and maximise PR in key targets publications, particularly those that might attract end- users. However, it will also be useful to build up PR coverage in property publications. The target publications will be:

- Co-Star
- Property Week
- Estates Gazette
- Local Publications
- Retail Week
- CEZ Press
- Bristol Business Community Forums

Brochure

It will be important to create both a physical and digital version of the brochure to provide leave-behinds for agents to use when speaking with potential tenants.

With the product we are creating it will be important to ensure the quality of the brochure meets the standard we are delivering with the building. We have a chance to create something interesting that people will want to look at and that will create a buzz.

This will require great photography, CGI's and high-quality written content, wrapped within a great brand narrative and visual identity.

Database

It will be important to gather a database of potential end occupiers, particularly as the market is increasingly looking at opportunities in advance. Gathering this data is just as important as the brand identity and narrative, and will provide a key source of potential tenants particularly with the scarcity of product in Bristol.

The following information should be gathered:

- Business Name
- Business Owner
- Sector
- Contact Details and Address
- Website
- Twitter
- Instagram

The scheme will need a reasonable level of investment in the marketing and the creation of a marketing narrative that strongly communicates the offer. It cannot be a case of just putting up agency boards and waiting for tenants to turn up - this scheme will require a pro-active approach to curation through directly approaching businesses about the opportunity as well.

We will produce a multifaceted letting strategy to promote the development using both traditional and innovative marketing tactics.

We will also identify and approach key local business stakeholders such as:

- Local businesses forums and associations
- Chamber of Commerce
- Local Council inward investment teams
- Sub-regional business forums
- Local business leaders
- Local Councillors
- Key local business influencers and entrepreneurs

All of the above-detailed stakeholders have a wealth of local knowledge and understanding of the local business community and often have serious leads and local intelligence on potential requirements.

During the leasing campaign, we will regularly undertake detailed research of the current retail, leisure and makers market in the local area and the wider sub-region to understand the current level of demand in the locality.

2 YEARS OUT

Product and Brand Launch:
The scheme website goes live along with branded site hoarding with key scheme details and messaging.

Launch Social Media Channels:
Begin to regularly share content on Instagram and Twitter to build up a following.

Soft Marketing Begins:
Undertake pre-let opportunities from agents' existing network.

Launch Event:
For key local stakeholders and business forums.

Initial PR:
For trade publications.

Engage Influencers:
Start using thought leadership to promote the scheme with key influencers. This should include the following mix of thought leaders:

- Local business leaders
- Scheme architects
- Key figures in the Council
- Leasing agents
- The visual identity and branding company

1 YEAR OUT

Full Marketing:
On agent's websites and further details on the scheme hoarding around rent, product and completion date.

Undertake Site Visits:
Along with site-based events for potential occupiers to look at the building works.

Liaise with Potential Occupiers:
In surrounding schemes, particularly those on short term leases with premises under threat of redevelopment.

Further PR:
With key trade publications.

6 MONTHS OUT

Key Leasing Period:
When most businesses start to look for new space if they need to move.

Launch Refreshed PR & Social Media Campaigns:
Use new imagery, CGI's, drone flyovers, etc.

Organised Visits:
For key local stakeholders, business forums and potential tenants.

OPENING PERIOD

Refresh PR & Social Media Campaigns:
Use some new messaging and potential a refresh of the brand with a view of the scheme becoming operational.

Further Site Visits:
A chance to show potential occupiers the building in operation.

Events for Local Businesses:
Particularly with local Councillors, Chamber of Commerce and other relevant business forums.

MARKETING STRATEGY

11

FIT OUT SPECIFICATION

ENHANCED SHELL AND CORE

Glazing
Specification should include clear glazing with 12% outer light reflection, semi-low iron glass.

Doors
Specification to include outward opening door-and-a-half frames that are thermally broken aluminium with PPC finish.
Lock and 4 keys to be supplied – Master key to be held by developer / operator

Shuttering
Spec to be agreed with architects and operator taking advice from Secure by Design Officer.

Level of Finish
Construction of shell and core + structural floor screeded and sealed with floor paint. External walls insulated, party walls finished, structural soffits painted all fire and environmental requirements achieved.

Mezzanines
The unit height will require a minimum of 5.27 meters clear to enable a mezzanine level. Further discussion required on whether a mezzanine is installed and what percentage level of unit coverage i.e 30% or 50% coverage of floor area. If mezzanine is provided as part of spec further work is required on the specification of the system.

Walls
To be white washed or as struck concrete
Wall loadings should be capable of supporting storage and fixing loads

Signage
A full signage and wayfinding strategy will be designed and provided by the landlord. Tenants will be provided with guidelines as to how to use this.

Ceilings
The tenant must ensure that any fixtures or fittings to the ceiling do not interfere with the cabling, pipework and lagging contained within, installing suspended ceilings where necessary. Landlord approval is required for any fixtures and fitting to any ceiling within the unit. Access must be maintained to all Landlord media.

Soffits
To be white washed as struck concrete or similar. Where plasterboard construction used for soffit / upper floor construction the boards should be taped & jointed and painted.

Structural Floor Loadings
The slabs to the units shall be designed for the following loading allowances as a minimum, or as per BS EN 1991-1-1 and the UK National Annex, where higher:
Specialist advice to be taken due to unique nature of project – load bearings critical. Suspect it will be the following:
Plant areas 7.5kN/m2 Staff only areas 3.0kN/m2 Workshop floor/maker space area 20kN/m2

Mechanical, Electrical and Plumbing
The design, installation and operation of all systems shall comply with all statutory and regulatory obligations where applicable, including the following:
All relevant British Standard Specifications Engineering Regulations (IEE) (BS7671) Institute of Plumbing Design Guide (IOP) Water Regulations The Building Regulations Loss Prevention Council (LPC)
British Standard Code of Practice (BSCP) CIBSE Guides to Current Practice and Technical Memoranda Institute of Electrical Local Fire Brigade Requirements Building Research Establishment (BRE) Digest Recommendations Health & Safety at Work Act CDM Regulations

Acoustic and Environmental Considerations
Consideration to be given in the detailed design of the external envelope to the acoustic, malodorous, dust and vibration transfer from the adjacent uses.

Emergency Lighting
Emergency Lighting to be provided and must adhere to the legal requirements. Building must have lighting fitted to emergency routes and exits requiring illumination.

Ventilation Systems (to check / take suitable professional advice)
A louver allowance of .25m2 aerodynamic free area for both the general ventilation inlet and discharge to be allowed at high level on each floor.
The Tenant will be responsible for providing their own ventilation systems, utilising the louvers.
The Tenant will be responsible for ensuring that the units meet Part F of the Building Regulations as a minimum.

Security Systems
Tenant may install their own security system
Telephone and Communications
Incoming ducts provided
Tenant to undertake own works on connection to telephone and data.

Spare Ducts
To allow the provision of any additional tenant requirements and future proof for any future technological advancements or innovation that tenant may require.

Tenant's Plant
It is the responsibility of the future tenant to provide all necessary additional works to support their plant requirements within their allocated demise and all works are subject to the approval of the Landlord.

ENHANCED SHELL AND CORE

Electrical Installation
Developer to provide an independent 3-phase electrical supply and a meter with supply capacity based on 300 watts/m2 All to be registered with an energy provider and operational prior to handover.
Tenant to take out account directly with utility company.
MPAN Number to be held by Developer / Operator for inclusion in the tenant pack.

Electrical Regulations
All electrical installations, materials, components, equipment and workmanship must comply with statutory and other obligations and the regulations of any Local Authority, Public Services or Statutory Undertaking relating to the execution of the works. In particular they must comply with the requirements of:
The IEE Regulations for Electrical Installations (BS7671)
Regulations under the Electricity Acts
Health & Safety at Work Act
The Electricity at Work Regulations
The National Inspection Council for Electrical Installation Contracting
The Building Regulations
C.I.B.S.E. Guides
CDM Regulations
BS 5266 Emergency Lighting: Code of Practice
BS EN 1838 Lighting Applications: Emergency Lighting
BS 5839 Fire Detection and Fire Alarm Systems for Buildings: Code of Practice
BS EN 7430: 2011 Code of Practice for Earthing
All other Relevant British Standard Specifications and Codes of Practice

Power Distribution
Developer to leave incoming power operational to feed lighting and also 1 double socket close to meter. Further distribution undertaken by tenant.

Gas Supply
Developer to supply any incoming gas supply and meter, registered and operational prior to handover. Pipework to be left terminated beyond the meter. Supply capable of supplying 200W / m2. Tenants to take out directly with utility company. MPRN Number to be advised to the developer / operator for inclusion in tenant pack

Water Supply
Developer to supply an incoming 28mm cold potable water supply delivering an equivalent of 1.5 litres / second at bar 3 per 100 sqm of GIA.
Meter provided by developer
Water supply to be registered with utility company and operational prior to handover

Small Kitchen Point
Howdens or similar
White or Grey Units, surfaces and cupboards– Contemporary style not old fashioned
Sink
Tiling
Include 2 double electrical sockets
Remaining wall areas to be painted white

Bathrooms (location to be agreed)
Basic WC facilities to be provided by the developer. Numbers to be calculated based on full-time equivalent (FTE) staffing numbers and calculated using the following guidance in the Homes & Communities Agency (HCA) Employment Density Guide. Will need to be suitable for the appropriate light industrial/maker space category (typical figures between 25sqm to 47sqm per FTE should be expected with Male : Female ratio being 50%: 50% split.
WC facilities to comprise basic sanitaryware (Ideal Standard, Concept range, or similar quality level), floor finishes of tile or sheet flooring, tiled walls to wet areas with remainder painted moisture resistant plasterboard with scrubbable bathroom paint. At least one in each group of WCs to be Doc M compliant accessible cubicle.
Where larger numbers are clustered together it will be acceptable to provide a cubicle system.
Shower rooms will be required to promote cycling to work to be provided by the developer close to the principle staff/worker entrance
Provision of toilet cubicles to be DDA Compliant
Sink and taps
Toilet system
Toilet roll holder
Sanitary bin solution
Both to be half tiled – using neutral metro tile
Remaining wall areas to be painted
Appropriate easy clean vinyl flooring
30 minute fire doors with locking system

Cycle Storage
As determined in planning agreement – allow one space per 250 sqm and 1 additional space per 1000 sqm for visitors.

PLUG & PLAY

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Meter provided by developer
Water supply to be registered with utility company and operational prior to handover
Power Distribution
Developer to incorporate incoming power to feed lighting and provide double socket close to meter. Further distribution of double sockets located strategically across each unit.
Air-conditioning and ventilation (HVAC)
Developer to provide heating and ventilation system to include radiator and air conditioning system to provide cooling if necessary

Signage Power
Supply Developer to provide a supply cable left suitably terminated on the soffit close to the middle of the main entrance doors ready to be adapted and extended to supply internal or external signage by the incoming tenant. Developer to provide a conduit from within the unit to the identified projecting signage and/or external signage location allowing the tenant to connect their signage without affecting the warranty of the envelope. Conduits to be left capped and weathertight

Bathrooms (location to be agreed)
Basic WC facilities to be provided by the developer. Numbers to be calculated based on full-time equivalent (FTE) staffing numbers and calculated using the following guidance in the Homes & Communities Agency (HCA) Employment Density Guide. Will need to be suitable for the appropriate light industrial/maker space category (typical figures between 25sqm to 47sqm per FTE should be expected with Male : Female ratio being 50%: 50% split.

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Sink and taps
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Small Kitchen Point
Howdens or similar
White or Grey Units, surfaces and cupboards– Contemporary style not old fashioned
Sink
Tiling
Include 2 double electrical sockets
Remaining wall areas to be painted white

PLUG & PLAY

Telecommunications (Phone & Data)
Developer to provide a working telephone and fibre data connection (with a minimum bandwidth of 100Mbps per 100sqm GIA) and register to a service provider ready for the tenant to take on a contract directly. Cabling to be brought into the unit and left terminated in a suitable and convenient location within a distribution point ready for the operator to provide onward distribution to individual tenancies.

Security Alarm
Developer to provide basic intruder alarm system with sensors on doors and windows (no PIR). To be registered to monitored service and left operational prior to handover. System to be capable of expansion (with sufficient zones) to cover subdivision of unit into individual sub-tenancies of an average size of 70sqm each. Tenant to take out account directly with monitoring company.

Fire & Smoke Alarm
Developer to provide two-stage BS 5839 L1 grade fire alarm system for the unit with the capacity in the future to allocate a zone individual sub-tenancies of 70sqm average size. They system should be linked into and identified as an individual zones on a wider landlord's system (e.g. the adjacent residential or office accommodation). Design to be developed and installed in line with the requirements of developed fire strategy for the wider development

Sprinklers
Developer to provide sprinkler system to entire unit if required in line with the requirements of developed fire strategy for the wider development. Sprinkler heads to be laid out on a regular grid with regular isolation valves allowing for adaptation by incoming operator following partitioning of unit.

Smoke Extract
Consideration to be given to the management of smoke in the event of a fire. A strategy for passive or mechanically assisted smoke extraction to be developed and installed by the developer in line with the requirements of detailed fire strategy for the wider development, and capable of further extension by an incoming operator to serve a partitioned layout with an average unit size of 70sqm.

Cycle Storage
As determined in planning agreement – allow one space per 250 sqm and 1 additional space per 1000 sqm for visitors.

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