

What problems do independent food businesses experience in Bristol?

and how can a Bristol Independents campaign help?

**Findings from six interviews conducted in October and
November 2011**

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What problems do independent food businesses experience in Bristol? How can a Bristol Independents campaign help?

Findings from six interviews conducted in October and November 2011

1 Summary

1.1. The Bristol Independents campaign was devised, in summer 2011, to begin the creation of a positive and recognisable unifying identity that could be used to promote locally owned and run businesses to people in Bristol.

1.2. The stimulus for the campaign was growing concern about the viability of the independent food sector in the face of continued expansion of the 'Big Four' food retail chains.

1.3. The initiation of the campaign has been delivered by members of the Bristol Food Network, with the help of a small amount of funding from NHS Bristol.

1.4. Six interviews were conducted during October/November 2011 with a range of workers involved with the independent business sector. The aim was to inform the strategy for the Independents campaign. This report describes the findings from these interviews.

1.5. The key messages for the Bristol Independents (BI) campaign are;

- It needs to promote local **independent** retail businesses irrespective of whether or not they are food businesses, and whether or not they sell organic, ethical, locally sourced etc.
- The meaning of local in this context is primarily about **locally owned and run** i.e. within the City region. Local sourcing is very welcome but is not the primary focus for an Independents campaign.
- The key 'hook' should be that money spent in locally owned businesses generates around twice as much benefit for the **local economy** compared with spending it in a national chain¹.
- It needs to build a **powerful umbrella brand** for BI businesses that becomes recognised across Bristol, and it needs to work hand in hand with the Bristol Pound (local currency).
- It needs to be built upon **participation** rather than consultation, weave a strong story about the value of independents, the narrative around place, and make clever use of communications media.
- It needs to help **bring together** diverse businesses, and it needs to link with trade organisations, and if possible play a role as a bridge between independent retailers and Bristol City Council.

1.6. The interviews also identified a range of complex problems faced by individual businesses, and by high streets as a whole. These are described in section 4 of this report.

1.7. Inevitably the interviewees spoke not just about the Bristol Independents campaign, but also about their perceptions of Bristol City Council (BCC). There was praise for the work of officers who are dedicated to supporting high streets, farmers markets and communities. Not surprisingly though, not all interviewees were aware of this work. The interviewees tended to view the City Council's work in its entirety and they noted how diverse departments can in effect give out different and contradictory messages. The traders' perception is that in terms of major investment decisions and permitted development the City Council as a whole seems unable or unwilling to actively support the development of the small independent business sector. The perception of interviewees was that BCC may underestimate the importance of small independents to the local economy, and may favour big players even where this means money leaving the local economy. The traders said that they would like **to work with** the Council and see this change.

2 Background

2.1 The 'Who feeds Bristol?' report of March 2011² highlighted the fragility and decline of the remaining independent sector food businesses in the West of England. Market diversity has reduced dramatically and four giant multiple chain retailers (Tesco, Asda, Morrisons, Sainsbury's) dominate the food sector³. Many parts of Bristol have no remaining high street shops selling 'cook from scratch' fresh ingredients. Independent food producers struggle to find 'routes to market' now that the delivery and wholesale infrastructure serving the independent sector has all but disappeared. St Philips market is the last remaining independent wholesale fruit and vegetable market serving the South West and South Wales and is under threat.

2.2 Concern about decline of our High Streets, not just in the food sector, has led the Government to commission a review by Mary Portas⁴. Concern within Bristol has prompted Bristol City Council to hold an 'Inquiry Day' to examine these issues.

2.3 Public concerns about loss of diversity and the threat to locally owned and run businesses has been manifest in high profile campaigns against Tesco Golden Hill, Tesco Stokes Croft and Sainsbury's Bedminster, and in the emergence of local buying groups, community food growing projects, community supported agriculture projects, community kitchens and ever growing waiting lists for allotments.

2.4 Much of the anger of campaigners has been directed at local planning authorities, yet planning law currently gives no power to discriminate between an independent business and a multinational chain. Bristol City Council has formally requested a change of 'Use Classes Orders' to create a power to support local independents.

2.5 Many customers and many traders are still unaware that the planned further expansion of the big chains brings threat to the local economy, to local jobs, to resilience and to the viability and diversity of our high streets. Studies have found that as little as 16 percent of money spent in a chain shop stays in the local economy, compared with 32% in an independent. For locally owned restaurants as much as 56% of money spent actually stays in the local economy, through its multiplier effect on local jobs. This benefits prosperity and resilience¹.

2.6 The Bristol Independents campaign was therefore devised, in summer 2011, to create a positive and recognisable unifying identity that could be used to promote locally owned and run businesses, to people in Bristol. The aim was to appeal to our love of diversity, character, friendliness, history and exchange. The first steps of the Bristol Independents campaign are described in a separate report compiled by Jane Stevenson. The campaign has been delivered by Jane Stevenson, Joy Carey and Kristin Sponsler on behalf of Bristol Food Network, with the help of a small amount of initial funding from NHS Bristol and with help and 'in-kind' support from Bristol City Council officers.

2.7 In order to better understand the problems faced by independent traders, and to inform the future development of the Bristol Independents Campaign, six interviews were conducted during October/November 2011 with a range of workers involved in the independent business sector. This report describes the findings from these interviews.

3 Method

3.1 The Bristol Independents team identified potential interviewees. The aim was to cover a range of different businesses, different roles and different geographical areas. The interviewees were;

- Abdul Malik, Managing Director of Pak Butchers (UK) Ltd., in Easton
- Alex Thompson and Chloe Lester of Dig-In, greengrocers in Church Road
- George Ferguson, founder of the Tobacco Factory theatre, café, bar, arts centre and outdoor markets in Bedminster
- Joe Wheatcroft, co-founder and director of Source food hall and café in St Nicholas Market
- Mike Abrahams, founder and partner in Wild Oats natural foods on Lower Redland Road
- Stacy Yelland, working for Easton and Lawrence Hill Neighbourhood Partnership as part of multi-sector team to support and strengthen the Stapleton Road, Old Market and Church Street neighbourhood.

3.2 Wilma Raabe on placement with NHS Bristol as part of her Masters course at Forum for the Future, contacted the interviewees to seek their cooperation and visited them to conduct the interviews. Typically the interviews lasted about an hour. All interviews took place during October/November 2011 and all, with permission, were tape-recorded. Themes were analysed. All interviewees have approved the final report.

3.3 The limitations of this inquiry are that it can only reflect the views and experience of these six interviewees. The interviewees were selected by the BI campaign team, so may be a biased sample. Nevertheless, the range of experience held by the interviewees is considerable and the findings yield important insights specific to Bristol in 2011. The fact that similar themes were identified by interviewees, despite them coming from different geographical areas and different roles, lends weight to the findings.

4 Findings

4.1 The six interviews covered a broad range of complex issues. They illustrate the fact that not only every street, but also every stretch of every street, has particular characteristics for example;

- ethnicity and cultural mix of customers, residents and traders,
- pattern of different retail and service businesses
- accessibility on foot, by public transport, bike and by car
- ownership of buildings, vacant premises and vacant sites
- crime levels at different times of day and night
- illegal and ‘under the radar’ businesses.

4.2 In order to present the findings in a manageable way, we will summarise them into what is in effect three ‘lists’ as follows;

- messages for the Bristol Independents campaign
- problems that were voiced
- dominant themes that emerged

4.3 Many of the important problems voiced are matters that the Bristol Independents campaign is not designed, or equipped to address. These matters are however reflected in the findings of the Mary Portas High Streets review⁴ the Bristol City Council Inquiry Day, and the Who Feeds Bristol report².

4.4 List number One; messages for the Bristol Independents campaign

Main messages;

- Overall the BI campaign is seen as positive by interviewees. They look forward to seeing the campaign develop and to understanding more about its aims, who is behind it, and what it can and cannot do.
- The BI campaign needs to be primarily about an identity for local **independent** businesses irrespective of whether or not they are food businesses, and whether or not they are organic etc. Trying to focus only on food and trying to bring in ethical and environmental criteria will be confusing, counterproductive and potentially divisive.
- The key ‘hook’ for why people should support local independents is to do with keeping money circulating in the local economy, its multiplier effect on local jobs, and the resilience that it brings. The primary focus needs to be about being locally owned and run. Studies have found

that as little as 16 percent of money spent in a chain shop stays in the local economy, compared with 32% in an independent. For locally owned restaurants as much as 56% of money spent stays in the local economy, through its multiplier effect on local jobs, and the benefits including resilience that this brings¹.

- The relationship between the BI campaign and the Bristol Pound (local currency paper and electronic being launched in 2012, backed by Bristol Credit Union) is potentially very strong and needs to be more clearly stated and used in communications; the two campaigns need to work hand in hand.
- The BI campaign needs to build a powerful umbrella brand for BI businesses that becomes recognised across Bristol.
- The BI campaign could be a means for bringing together all sorts of organisations and businesses and it needs to link strongly with farmers markets too.
- It is essential to base the campaign upon participation, not on consultation.
- The BI campaign needs to weave a story and make cleverer use of the media. Although there is good take up of stories about small scale community activities in the local media, in general the reporting on business, transport and the economy tends to reflect the influence of media funding from big corporations, with big business regarded as more 'serious' than small independents.
- The positive advantages of independents need to be highlighted – choice, community, social belonging etc.
- The BI campaign can play a role in acting as a bridge between independent traders and Bristol City Council, in order to help convey the problems that independent traders face, and to help publicise the support that BCC is offering now and in the future (see Appendix 1 for examples).
- Links could be formed with other trading associations; the National Market Traders Federation is one example.

4.4.1 Extra points;

- There can be confusion about whether 'local' also has to mean local sourcing, and also about how local is local in terms of where the business is run from. The BI meaning of 'local independent' needs to be clearly embedded in all the communications. The geography of what is local for this campaign is quite broad - the City, the West of England, the South West, and also our links with Cardiff.

- The BI campaign needs to be clearer about the fact that it is primarily about promoting the BI message to the general public and to traders. There is a risk that traders will see it as a something that can provide them with direct help and support, e.g. for new businesses starting up, which it is not equipped to do. Provision of direct help and support is important. There is a role here for the City Council and for business support organisations.
- The BI campaign needs to help communicate to the general public and traders, the importance for a strong local economy and strong food system of having a diverse and thriving independent sector, and the threat posed by further expansion of the market share of the 'Big Four', especially the threat to St Phillips wholesale.
- There is a need to build unity and cooperation amongst independent traders and the BI campaign could help to facilitate this wherever possible.
- There is a need to support the high streets that are surviving so that customers there do not take them for granted. There is also a far bigger challenge to help strengthen the high streets that are really struggling, and it would be good if the campaign could play a role in this.
- The interviewees mentioned several innovative ways in which traders can collaborate, raise the profile of the independent sector, and attract positive media coverage. Physical, visual events that change spaces and places such as store swaps, street events and 'out of shop' days were amongst the examples mentioned. This is already starting to happen and some events have attracted positive and insightful coverage by the BBC.

4.5 List number Two; problems faced by independent traders

- Many independent traders are so busy and overworked they do not have time or energy to engage with campaigns, to think strategically, to build links with other local traders, or to build links with existing local community groups such as the Stapleton Road Working Group, Old Market Community Association, Stokes Croft Traders etc. Even when traders express a wish to help set up local traders associations (for example) it is really difficult to get more than a tiny handful to turn up to a gathering.
- Many traders are unaware of the seriousness of the wider issues affecting the food system (resource depletion, ecological damage, slave labour, loss of market diversity etc)
- Many areas have empty boarded-up premises that create a derelict impression and attract litter and vandalism. Crime is a problem, for

example on Stapleton Road there have been three violent incidents in 2011.

- Unless there is a good mix of businesses it is hard for shops to thrive e.g. if it is only kebab shops and charity shops this does not attract people for their main shopping.
- There is a lack of transparency and information about who owns estate and premises and who is responsible for them, what the lease arrangements are. This makes it hard for local entrepreneurs to make sound business decisions.
- There is little in the way of accessible information about the business activity and turnover across the city. This also makes it harder for local entrepreneurs to make sound business decisions.
- There is no clear information and no clear overview to enable local businesses to find and connect with others who would be able to cooperate.
- There is little in the way of readily available help for new start-up businesses. Through organisations such as the Chamber of Commerce it should be possible to provide business support, to supply case studies about planning permission etc. The chains provide this for their branches or franchisees and have the power and resources to take a strong strategic overview, to access market and estates information, to provide powerful marketing, legal support, etc.
- Until a business is well established, it is not possible to find the time and space to work on collaboration and cooperation between businesses. However, Bristol is home to many young energetic skilled entrepreneurs, some bringing skills from abroad, who could engage if circumstances were right.
- There are many illegal businesses that change their names every couple of months in order to evade regulations.
- Rents and business rates can be very high for small businesses to cope with.
- There are too few women involved in running businesses in local high streets for example in Easton, and female customers can feel intimidated when there are clusters of men hanging out around the shops and businesses. Businesses run by women for women, such as beauty salons, have tended to move off the high street and are run from home, which is seen as more culturally acceptable.
- There are language and cultural barriers that make it difficult to integrate across cultural groups, and this results in distinct clusters e.g.

Polish, Somali, Pakistani each having separate clusters of shops not through any deliberate desire to be separate but just because it takes a lot of effort to integrate. The existing high street environment does not foster cultural interchange.

- Generally speaking the younger traders are more aware of the social and cultural issues affecting the streets, and are open to new ideas and working together. Older traders may tend to be less receptive; they may feel they've tried all this before.
- There is a need for cohesive branding of each distinct area, and for high streets to be promoted for all the businesses and services there, and to form communication channels with regular customers and to potential visitors.
- Noisy, heavy through traffic is a problem. Pavements are not pleasant spaces to linger and chat, bus services are expensive and unreliable, bike parking is limited, roads are dangerous for people on foot, and crossings are not well designed. Poor management of on-street parking means that parking is taken up all day by commuters which leaves inadequate convenient short-term shoppers' parking available. In general the interviewees were not aware of the successful transport and parking innovations that have worked well in other cities. (Note; Sustrans research in Bristol found that whilst shopkeepers estimated that 41% of customers came by car, the actual percentage was 22%⁵. Measures that make streets good for pedestrians, bikes and bus passengers are therefore as important as car parking. Europe-wide evidence is available on how best to manage parking for thriving high streets⁶).

4.6 List number Three; dominant themes

Key themes that emerged from the interviews can be summarised as follows;

- **A thriving high street needs a diversity of businesses.** Interviewees stressed the importance of having a good mixture in order to create a viable high street.
- **Cultural diversity is both a strength and a challenge.** It takes time, skill, and effort to bridge cultural differences, and often the physical environment does not help.
- **Lack of awareness of the need for a more resilient food system and local economy is a real problem.** The interviewees explained that it is not just the general public, but also many traders, that have insufficient knowledge of the food system they operate in. They believe that most traders and business people are unaware of the deep threats facing our food system and of the impact that further expansion of the giant multiples will have on the resilience of our local economy.

- **Need for support for our motivated and inexperienced entrepreneurs.** Several interviewees explained that Bristol has many energetic, dynamic business people some of them relatively young and inexperienced. There is a need for support and access to resources to make the best of this asset.
- **Collaboration and competition.** A theme that kept coming up, and that seemed to apply in all areas, was the difficulty with establishing local traders associations. There was recognition that competition is a positive force, making businesses perform well and be efficient, but also that collaboration was important too.
- **Role of the Council, reputation, responsibility and transparency.** There was a consistent view from the interviewees saying that they, and other traders, wondered about the workings of the City Council. There was a general perception that taking the actions of the Council as a whole, it appeared to be influenced by the needs of 'big business' in preference to the independent retail sector. There was a feeling that the Council gives out contradictory messages to local independent traders. Negotiating the different departments that have to be dealt with is confusing and difficult. The major chains have specialist staff dealing with these matters on a regionwide or national basis and therefore have a major advantage. They can also afford to take risks and flout the regulations. They can also access information that an individual trader would not have the specialist knowledge or resources to track down. There was a view that traders wanted consistent support from the Council, and that they wanted to be able to participate in creating a strong independent sector, rather than just being consulted. Traders struggle with the lack of transparency about estate ownership and leases, and information about the pattern of business activity in an area. This makes it hard for new businesses to make wise choices about premises and location for example.

5 Conclusions

5.1 The information obtained from the interviews has met its primary purpose of giving valuable advice for the development of the grassroots-initiated Bristol Independents campaign.

5.2 In addition, it provides information about problems in Bristol in 2011 faced by the independent retail sector, which supplements the evidence from the Bristol City Council Inquiry Day.

5.3 This report will be presented to Bristol's newly formed Food Policy Council, and will be circulated to officers and elected members within Bristol City Council, including the fourteen Neighbourhood Partnerships, as well as to relevant business support organisations.

Acknowledgements

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Appendix 1 Summary of Bristol City Council work to support high streets and independent small businesses.

Bristol's vision for strong high streets (retail centres) is set out in the Bristol Development Framework (June 2011) and BCC's Economic Development Guide 2012-25. Bristol's support for centres will be further confirmed in a Retail Action Plan (RAP).

The aim of the RAP will be on making centres more diverse and responsive to change by working together to create connected, enterprising, creative and green centres. Emerging themes include:

- 1) Developing a long-term approach to supporting and coordinating activity in neighbourhood retail centres
- 2) Planning and property
- 3) Business support and training
- 4) Building capacity
- 5) Business development and marketing

The RAP is being informed by ongoing liaison with traders' associations, business groups, the recent High Street Inquiry held by the Sustainable Development & Transport Scrutiny Commission and the Portas Review.

The below details some activity already underway that fit with the above themes:

1) Developing a long-term approach to supporting and coordinating activity in neighbourhood retail centres

Many of the issues impacting on centres or support to businesses are the responsibility of BCC ranging from Planning and Markets, to Trading Standards and Waste & Cleansing. There are 20-30 teams within BCC who have a role in centre activities.

Working with Neighbourhood Partnerships to look at ways of supporting Bedminster, Stapleton Road, Ridingleaze and Whiteladies Road.

Support Broadmead management and Business Improvement District through Destination Bristol. Destination Bristol are leading a wider City Centre Retail project on behalf of BCC. Supporting Stokes Croft, Old Market, Christmas Steps/Colston St, Park Street and the Old City.

Submitted Bristol Retail+ City Team Portas Pilot bid. Supported local bids from Bedminster, Old Market, Gloucester Road and Church Road. Outcome expected late May 2012.

2) Planning and Property

Consulting on Development Management/Site Allocations Development Management Documents, the Bristol Central Area Action Plan and Public Realm & Movement Framework.

3) Business support and training

Bristol Futures acts as a point of contact for traders' associations and business groups (e.g. Federation of Small Businesses) on any issues they need support on from BCC or its partners. Maintain www.bristol.gov.uk/retail and email account retail@bristol.gov.uk

Promote apprenticeships to retail businesses and market traders. Working with City of Bristol College and National Market Traders' Federation to develop a tailored apprenticeship programme for market traders.

Work with City of Bristol College and the National Retail Skills Academy to promote specialist retail training courses for businesses, including customer services, business planning, finance, sales, buying, visual merchandising, hospitality, catering, health and safety, food safety and hygiene.

Promote Small Business Rate Relief potentially available for businesses that occupy a property with a rateable value of less than £18,000.

Developing a toolkit of setting up an independent retail business.

4) Building capacity

Liaison with existing Traders' Associations and work with traders to develop new Traders' Associations. Recent examples include Brislington and Stapleton Road.

Run @ShopLocalBris Twitter site. This site has over 1,600 followers.

Development of wifi in retail centres included as part of the Bristol Urban Broadband Fund bid.

5) Business development and marketing

Run markets at St Nicholas and facilitate other markets across the city.

Development of Markets Strategy & Action Plan. This includes support for St Philips Wholesale Market.

Taking part in Love Your Local Market fortnight taking place from 23 June to 8 July.

Running Big Green Week, including a market and development of Good Bristol app, which will include the promotion of local shops etc.

Support local community based initiatives – the Bristol Pound and the Bristol Independents campaign. Working on Independents' Day taking place on 4 July.

Support and promote of Bath & Bristol Freight Consolidation project.

Promotion of community toilets scheme.

Prepared by Jason Thorne, Bristol City Council

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