1. BRIDGEND TOWN CENTRE HEALTH CHECK – INDICATORS OF VITALITY AND VIABILITY – 1998

1.1 INTRODUCTION

1.1.1 A report to the Bridgend Town Centre Regeneration sub-committee outlining the need for a health check for Bridgend town centre was approved by the 15 May 1998 meeting. This document provides an analysis of the key indictors of town centre health and presents the findings which show how Bridgend town centre is currently performing.

1.1.2 Planning Guidance (Wales) Technical Advice Note (Wales) 4, (TAN 4) Retailing and Town Centres, 1996 places importance on the need to assess the vitality and viability of town centres. It encourages such assessment as part of development plan preparation and as an important element in deciding whether proposals for new retail development are acceptable. Increasing pressure on town centres and limited public resources requires a reliable means of assessing their relative health so that appropriate action can be initiated. Vitality is reflected in how busy a centre is at different times whilst viability refers to the ability of the centre to attract continuing investment, not only to maintain its fabric, but to allow for its improvement. Baseline information and time series data can provide a picture of change and a guide to future trends.

1.1.3 Town centres are places which provide a broad range of facilities and serve as the focus for community and public transport. Their continuing health depends a great deal on them being able to draw enough people to spend time and money in the centre. However, growing competition between centres calls into question what functions town centres will be performing in the future.

1.1.4 Town centres have a range of functions which can be classified under a number of areas as follows:

- Market places: This covers the selling of comparison, convenience and specialist goods.
- Business centres: This includes the provision of financial and business services and administration.
- Educational, health and fitness resources: This covers the provision of schools, colleges and universities, as well as hospitals, recreation and health clubs, dentists and doctors.
- Meeting places: This covers aspects such as cafes, restaurants and pubs.
- Arts, Culture, and entertainment facilities: Libraries, museums, galleries, theatres, cinemas and concert halls.

1.1.5 A health check of a town centre focuses on four basic principles: attraction, accessibility, amenity, and action - the 4 A's.

1. **Attractions:** These are the foundations of a healthy town centre, and refer to what draws in its customers. The range or diversity of shops/services is the principal factor for town centre health.

2. **Accessibility:** This refers to how easy it is to reach the centre. There are two main aspects. The first, mobility refers to the time and cost of getting to the centre from where people live. Secondly, it depends on local facilities, infrastructure or linkages. Parking, bus and rail stations need to be easily found, conveniently sited and well integrated with the core of the town centre.

3. **Amenity:** The third component of a healthy town centre refers to how pleasant a centre can be as a place to visit. Many studies have shown the importance of a clean and attractive environment, poorly maintained places generally are a deterrent. A centre that is perceived as dirty or dangerous deters rather than attracts customers.

4. **Action:** The fourth component of health is concerned with making things happen. Fundamentally, success in improving a town centre depends on the ability of the local authority and all other agencies, such as major retailers, small businesses and voluntary associations to work together to promote the success of the town centre.

1.2. MEASURING THE HEALTH OF A TOWN CENTRE

1.2.1 The indicators of town centre vitality and viability can be split into 2 distinct categories; retailing criteria and property criteria. The retailing criteria are concerned with indicators of both size and success. Size can be measured by factors such as total floorspace, number of shops, vacancy rates, presence of national and multiple retailers. Success can be measured in terms of factors such as sales per square foot, turnover etc. Property criteria deal with rental and capital values.

1.2.2 There is an absence of agreed measures on how or what to assess as a measure of town centre vitality and viability. Two factors appear to have contributed to this, one is the view that you only need to walk down a street to determine the health of a town centre. The second reason is the absence of readily available information on what is happening to a particular town centre. Without commonly established measures too much time has been wasted in unnecessary arguments at public inquiries. The determination of retail planning applications has continued to focus on issues of economic impact such as the effect on turnover, trade diversion and traffic impacts. The calculation of catchment populations, retail expenditure and turnover in relation to floorspace are very complicated and fraught with difficulties because in the UK most people visit more than one centre to do their shopping.

1.2.3 Both TAN 4 (Wales) and Planning Policy Guidance Note 6, Town Centres and Retail Development, 1996, produced by the Department of the Environment Transport and the Regions (DETR) acknowledge that in practice most aspects of vitality and viability are difficult to evaluate. They have, however, tried to further their use to include two indicators capable of providing the main criteria for the purpose of planning applications and appeals. These two indicators are retail rents and yields, the latter being a measure of capital value which indicate how attractive a centre is to investors, and pedestrian flow or footfall which indicates how busy a centre is at different times. To these two key indicators others have been added which may be relevant and are important when looking at the underlying components of a healthy town centre in terms of the range, diversity of shops/services, retailer representation and change, vacancy rates etc.

1.2.4 The following indicators are therefore listed in TAN 4 (Wales) as useful in assessing the health and attraction of a town centre:

- Retail floorspace rents and commercial yield
- Pedestrian flow
- Retail provision
- The diversity of uses
- Retail representation and change
- Vacant street level property
- Accessibility
- Perception of safety and occurrence of crime
- State of the town centre environmental quality
- Customer views and behaviour
- Turnover in relation to floorspace

1.2.5 None of the above indicators taken in isolation can provide a true picture, however, taken together they can provide an effective insight into the performance of a town centre. They can be used to assess whether a town is at risk in comparison with other towns of similar size and function. The indicators are most effective when used as a measure of change over time. A health check is therefore something that needs to be done on a regular. Ideally this would be annually, but this raises significant resource issues.

1.3. RETAIL FLOORSPACE RENTS AND COMMERCIAL YIELD

1.3.1 **The rental value** for retail units in a town centre are normally quoted in terms of rent per square foot in zone A in the 100% prime pitch. Zone A is frequently defined as the first 6 metres depth of floorspace in retail units from the shop window. The 100% pitch refers to the highest value area within a town centre and is typically occupied by shops. This is an area of some 45-90 metres long in the most heavily used part of the high street, and is typically occupied by shops selling fashion and other comparison goods. The 100% pitch is often found in the traditional high street but could form part of a purpose built shopping centre.

1.3.2 Movement in the prime zone A retail rents is a useful indicator for assessing the health of a town centre and has advantages over other indicators in that data exists which covers all towns of significant size on a comparable basis over time.

1.3.3 An ability to forecast accurately the rental performance of the town centre will enable the authority to efficiently plan and target resources to improve town centre vitality and viability. Knowledge of changes in the rental value of a town centre over a period of time compared to other centres also provides an indication of the demand for retail space by retailers wanting to establish themselves in the centre and therefore encapsulates retail success.

1.3.4 Table (1) shows average prime retail rent trends for Bridgend town centre compared to other centres. The information has been obtained from the Erdman Lewis and Cooke & Arkwright Retail Rents Databases. The rental values relate to a hypothetical standard retail shop unit in the prime pitch.

Table 1 : Prime Zone A retail rental values (£/sq ft)

	90	**91**	**92**	**93**	**94**	**95**	**96**	**97**
Bridgend	55	55	55	55	55	55	58	58
Cardiff	165	160	155	145	140	140	150	160
Swansea	120	120	105	100	100	100	100	125
Newport	100	100	110	80	100	110	110	115
G.B	79	76	72	70	70	70	75	81

Source: Cooke & Arkwright Welsh Property Review, 1997
Colliers Erdman Lewis In Town Retail Rents, 1997

1.3.5 Between 1990 and 1995 average zone A prime rents for retail in G.B fell from £79 per sq ft to £70 per sq ft, but saw a rise to £75 per sq ft in 1996 and then up to £81 per sq ft in 1997. Cardiff, Newport and Swansea have also experienced declining zone A retail rents during the period 1990-95, but have seen a rise since 1995 in line with the national trend. In Cardiff, for example, between 1990-95 prime zone A rents fell from £165 per sq ft to £140 per sq ft, then rose to £150 per sq ft in 1996, and £160 per sq ft in 1997. In Bridgend, however, the trend has been different where zone A prime rents during the period 1990-95 remained constant at £55 per sq ft, but there was a small increase in 1996 to £58 per sq ft. In 1997 rental levels for Bridgend again averaged £58 per sq ft. This small increase is, however, out of line with the national trend where prime rents have increased by 13% since 1995. This increase is also reflected in Cardiff where average prime rents increased by 12.5% since 1995.

1.3.6 A major reason for the significant uplift in the G.B and Cardiff averages over the past year or so is caused by many retailers looking for bigger spaces particularly in the large town centres. The demand for space in the larger centres has come from retailers trading mainly in the growing areas of young fashion, multi-media and lifestyle products. These new large multiple retailers prefer locations in large quality town centres where catchment populations are large and affluent, such as Cardiff and Bristol, known as the 'Super Prime' centres. The large demand by retailers for space in the 'Super Prime' centres has led to a much faster rental growth in these locations.

1.3.7 The demand for such space is not occurring in Bridgend where average rental values have not risen as high. This trend provides evidence of the pressure on the vitality and viability of a small size town such as Bridgend. The demand to establish large multiple stores providing a full range of products at a competitive rate does not appear to exist in Bridgend. Infact most of the large retail development has taken place on the out of town retail parks where rental levels are much lower averaging £11 per sq ft.

Table 2 : Secondary Shop Rents (£/sq ft)

	90	91	92	93	94	95	96	97
Bridgend	35	35	35	35	35	35	25	25
Cardiff	65	65	60	60	65	65	65	70
Swansea	40	40	35	35	35	35	35	40
Newport	50	45	35	35	40	40	40	40

Source : Cooke & Arkwright Welsh Property Review 1997

1.3.8 For the most part rental values in the secondary zone for Bridgend saw little change between 1990-95 and were consistently lower than the other 3 big centres in South Wales. Since 1995 there has been an apparent fall in secondary rental values from £35 per sq ft in 1995 to £25 per sq ft in 1996 and 1997. This is not in line with the Cardiff and Swansea trends where average secondary rental values have increased. This could indicate a lack of interest by retailers and investors in premises outside the prime pitch areas which are characterized by non-class A1 uses such as professional and financial services, hot food takeaways and other low quality shops.

1.3.9 **Yield** enables the values of properties of different size and locations to be compared. It is the second and more complex indicator suggested in TAN 4 (Wales) It is the ratio of rental income to capital value and is expressed in terms of the market rents of a property as a percentage of the capital value. The lower the yield the higher the capital value resulting from a given rental income. Yields are based on the evidence of transactions where individual properties are bought and sold. The degree to which values decline with distance from the prime pitch vary from town to town. The level of yield broadly represents the market's evaluation of the risk attached to the income from shop rents.

1.3.10 Generally lower yields reflect competition by investors to secure income in a particular town. It is normally the case that towns with large shopping areas in their centres tend to have lower yields than smaller towns.

Table 3 : Retail Floorspace Yields

	Prime	Secondary
Bridgend	6.5% - 7.25%	(Not Available)
Cardiff	5.0% - 6.0%	7.0% - 10.0%
Swansea	5.5% - 6.5%	7.5% - 11.0%
Newport	6.0% - 7.75%	7.5% - 12.0%

Source : Cooke & Arkwright Welsh Property Review, 1997

1.3.11 The yield for Bridgend ranges from 6.5% to 7.25% which is higher than that for Cardiff and Swansea. This indicates that Bridgend town centre is not rated as highly as Cardiff and Swansea by investors which have yields of 5.0% - 6.0% and 5.5% - 6.5% respectively. However Bridgend's yield is considered average for a town of this size, it compares favourably with Newport for example, and suggests that there is a degree of investor confidence in the area. This is borne out by Great Portland Estates Plc's purchase of the Rhiw Centre which was agreed in late 1997.

1.3.12 From major life and pension funds it is possible to assess total returns and investment performance of a centre. The Investment Property Database (IPD), which is the premier source of information on the performance of the UK property
* market, has produced a league table of performing town centres (Appendix A). The table is based on the assessment of the performance of 250 centres across the UK between 1994 and 1997. The ranking of centres is based upon total returns which is the industry standard for measuring investment performance; it is the sum of the annual change in the capital value of a property and the rental income received by the landlord. The change in the capital value is in turn the product of a change in rental values and movements in property yields.

1.3.13 Total returns are particularly relevant to town centre health checks because they encompass movements in both rental values and property yields. The league table provides a useful insight into those centres which are maintaining their place in the retail hierarchy and those which are not. Bridgend is ranked 147th in the league of 250 centres analysed; its total return has been valued at 6% averaged over a three year period between 1994 and 1997. The league table shows that Bridgend in 1994 was ranked 29th and has infact fallen 118 places between 1994 and 1997 according to the I.P.D.special report.

1.3.14 The ranking shows that Bridgend town centre falls roughly in the middle of the league table. Town centres towards the bottom of the league table are likely to be unhealthy because their low returns reflect falling rental values and relatively unfavourable movements in yields. On the other hand town centres right at the top of the league table may also be unhealthy because their high returns and rental growth are the result of a shortage of premises or likely constraints on development. Bridgend's ranking indicates that investor confidence in the town centre has fallen over the last 4 years. By comparison Cardiff is ranked 68th Newport 44th and Merthyr Tydfil 142nd.

1.3.15 In summary, the evidence of the IPD survey suggests that city centres display the greatest vitality and viability while small industrial and market towns are under most pressure.

1.3.16 It should, however, be noted that although the findings of the IPD league table survey are interesting for comparison purposes they must be treated with caution because the relationship between total returns and town centre health is complex and non-linear,

1.3.17 Office rental levels and yields provide an indication of the demand by companies and employers to locate in the town centre. The establishment of offices in town centres is good for maintaining their vitality and viability, they create employment, diversify the economy of a town and reduce the need for travel. Although retailing underpins town centres offices play an important part in ensuring the health of a town centre.

Table 4 : Office Rents and Yields

	Rents (£/sq ft) 1997	**Yield (1997)**	
		Prime	**Secondary**
Bridgend	£4.30 - 8.00	12.0% - 14%	14.0% -16.0%
Cardiff	£14.0 - 16.0	7.0% - 8.0%	10.0% - 12.05
Swansea	£6.00 - 8.00	10.0% - 11.0%	12.0% - 14.0%
Newport	£8.00 - 10.00	9.0% - 11.0%	12.0% - 15.0%

Source : Cooke & Arkwright Welsh Property Review 1997

1.3.18 For 1997 best rents for commercial offices in Bridgend ranged between £4.30 per sq ft and £8.00 per sq ft. This is considered to be average for a small industrial town in Wales. However rents in Bridgend are much lower than those achieved in Cardiff which range from £14 per sq ft to £16 per sq ft.

1.3.19The yields for prime offices are lower than that for secondary locations. This reflects the higher demand for offices in the prime locations, and therefore the higher rents achievable. Cardiff, Swansea and Newport yields for both prime and secondary locations are lower than Bridgend's which reflects their more attractive positions as office locations. Bridgend's office yields as with retail yields are again considered average for an industrial town of this size in Wales.

4. PEDESTRIAN FLOW

1.4.1 The second key indicator of town centre performance is pedestrian flow or footfall. This provides the most basic measure of usage, counting the number of people passing a particular point at a particular time. The more people on the street, the livelier the centre will feel. Pedestrian flow is therefore more concerned with measuring vitality rather than viability. To be of value, it is important that pedestrian counts are undertaken at various locations, not just in the prime shopping area, and at different times of the day. Pedestrian flows can also be used to assess initiatives to improve town centres and in assessing the impact of out of town retail development.

1.4.2 It is difficult to assess changes in pedestrian flows over a period of time for Bridgend town centre because there is no published pedestrian flow information available to enable comparisons to be made. No detailed pedestrian count surveys were undertaken by the consultants who produced the Bridgend Town Centre Study. However, from observation Adare Street, Caroline Street, and Wyndham Street stand out as enjoying high pedestrian flow. Low flows are most apparent in the secondary area of Nolton street. This is an area where further survey work is needed to enable proper monitoring.

1.5. RETAIL PROVISION

1.5.1 Figures for floorspace and retail units for Bridgend and other locations have been derived from GOAD survey data (1997). The floorspace data relates to the footprint of retail outlets.

Table 5 : Floorspace in Bridgend compared with other locations

	All Outlets	**Floorspace , *000 sq ft***
Bridgend	301	655.4
Cardiff	731	1,714.7
Swansea	478	1,587.4
Merthyr Tydfil	233	430.8
Pontypridd	209	396.6

Source : Goad 1997

1.5.2 In Bridgend there is a total of 301 outlets occupying a gross floorspace area of 655,400 sq ft which is much larger than Merthyr Tydfil's and Pontypridd's retail areas. Bridgend's retail area represents about a third of Cardiff's. Similarly Swansea's retail area more than doubles that of Bridgend in terms of floorspace occupied.

1.5.3 Retail provision is expressed as total floorspace. In table 6 floorspace has been broken down into three categories:

Comparison goods outlets - predominantly selling durable non-food goods (primarily use class A1)

Convenience goods outlets - predominantly selling food (primarily use class A1)

Services outlets - banks, building societies, restaurants, takeaway (primarily use classes A2 and A3)

Table 6 : Change in the Number of Retail Outlets

	1986	**1989**	**1994**	**1997**
Convenience	32 (10.5%)	28 (9.0%)	22 (7.1%)	18 (5.9%)
Comparison	157 (51.5%)	160 (52.5%)	160 (52.1%)	153 (50.8%)
Services	67 (22%)	73 (24%)	86 (28.0%)	95 (31.5%)
Total	256	261	268	266

source : Goad

1.5.4 Between 1986 and 1997 there has been a small increase in retail outlets in Bridgend, however, between 1994 and 1997 there has been a decrease. In 1997 50.8% of all retail outlets sold comparison goods, 5.9% convenience goods and 31.5% provided services to the general public.

1.5.5 Within the retail categories the most apparent trend has been a noticeable increase in service sector outlets and a decrease in convenience goods outlets.

Since 1994 there has also been a decrease in the number of comparison goods outlets. These figure broadly accord with national trends in town centres where there have been similar changes in these sectors. The trend can be attributed to retailers favouring out of town locations on the new retail parks which have developed since 1994, e,g Halfords moved out of the Rhiw centre to the Bridgend Retail Park. Retailers such as Tesco, Lidl, Shoe City, Comet, and Carpet stores have located on the Bridgend and Waterton Retail Parks.

1.5.6 *Appendix B sets out changes from GOAD figures by outlet during this 11 years period. The main conclusions which can be drawn from this more detailed analysis are that:

- Newsagents and butchers have been the main losses from the convenience sector in recent years.
- Hairdressers, health centres, restaurants, coffee bars and fast food takeaway have been the principal gains in the services sector.
- The main losses in the comparison goods sector has been in the DIY/houseware and electrical goods categories.
- The representation of clothes and footwear outlets is slightly higher than the national average.

Table 7: Change in Retail Floorspace ***000's Sq ft (Ground floor footprint floorspace)***

	1994	**1995**	**1996**	**1997**
Convenience	74.7 (12.6%)	68.2 (11.5%)	118.6 (17.9%)	117.9 (17.9%)
Comparison	322.6 (54.4%)	343.8 (57.9%)	333.4 (50.4%)	326.3 (49.7%)
Services	129.1 (21.7%)	126.8 (21.3%)	128.0 (19.3%)	132.3 (20.1%)
Miscellaneous	66.4 (11.2%)	54.2 (9.1%)	80.5 (12.1%)	78.9 (12.0%)
Total	592.8 (100%)	593.0 (100%)	660.5 (100%)	655.4 (100%)

Source : Goad

1.5.7 The GOAD floorspace information (1997) shows that Bridgend town centre is dominated by comparison uses, occupying 326,000 sq ft (50%) of the total floorspace. The centre is well provided for in terms of service uses both in terms of floorspace (20%) and number of units (32%). The level of convenience goods provision is less well represented with 117,900 sq ft (18%). Although the number of convenience goods outlets has declined over recent years, the actual floorspace occupied has infact increased significantly. The floorspace for the comparison and services sector has not changed significantly.

1.6. THE DIVERSITY OF USES

1.6.1 Bridgend town centre has a well balanced provision of retail and non-retail outlets. There is a broad range of multiple and independent retailers. Convenience provision is provided by Kwik Save and Tesco. The comparison goods outlets are complemented by well represented services facilities consisting of all the major high street Banks, Building Societies and financial institutions. There is a range of bars, restaurants, coffee shops and fast food takeaways (32). Other uses within proximity of the town centre include hotels and a concentration of offices along Court Road. There are few existing leisure, entertainment and cultural facilities in the town centre. Cultural activities are important because they express the character of a town and contribute to its vitality.

1.7. RETAILER REPRESENTATION AND CHANGE

1.7.1 Bridgend has a reasonable range of national multiple retailers including Boots,
* Woolworth, WH Smith, Burton's, and Argos (Appendix C contains the full list). However, the centre lacks a major department store or a mainstream fashion based variety store such as BHS, C&A or Marks and Spencer.

1.7.2 In terms of convenience goods Bridgend contains a number of important food stores. Tesco operate a 52,000 sq ft superstore at Brewery Lane. The Kwik Save superstore, within the Brackla Street Shopping centre provides (54,000 sq ft). Kwik Save also operate two other food stores within the town. The oldest is at Quarella Road (14960 sq ft). The newer store is off Brackla Street and extends to approximately 27,000 sq ft. There is also a small Iceland store in the Brackla Street Shopping Centre. (5,000 sq ft)

1.7.3 In order to estimate the level of retailer demand for representation in Bridgend town centre information is available from Focus Database, which is produced by the firm property intelligence and is based upon information provided by retailers to the firm. This indicates that in 1997 there were some 14 retailers seeking representation in Bridgend. Some of them may be seeking out of town locations. A full list is
* provided in Appendix D.

Table 8: Distribution of Outlets by size

		No	Per cent
Under	1,000 sq ft	113	37.5
Between	1,000 and 2,499 sq ft	137	45.5
Between	2,500 and 4,999 sq ft	32	10.6
Between	5,000 and 9,999 sq ft	7	2.3
Between	10,000 and 14,999 sq ft	8	2.6
Between	15,000 and 19,999 sq ft	2	0.6
Between	20,000 and 29,999 sq ft	0	0.0
	30,000 sq ft and above	2	0.6

Source: Goad

1.7.4 Retail shop units in the town centre are relatively small in nature. Around 45% have an area less than 2500 sq ft (232 sq mt). 37% are infact less than 1,000 sq ft (92 sq mt). This tends to limit the choice of premises available to new large retailers looking for large units in town centres.

1.8. VACANT STREET LEVEL PROPERTY

1.8.1 Vacancy rates are much used in assessing town centre health. TAN 4 (Wales) suggests that street level vacancy in the primary retail area should be taken into account when measuring vitality and viability, but should be used with care, as vacancies can arise even in the strongest towns.

Table 9: Number of Vacant Units

	1986	1989	1994	1995	1996	1997
No of vacant units	29	24	35	34	39	30
Per cent of all units	10.1	8.4	11.5	11.2	12.7	9.9

Source : Goad

1.8.2 Vacancy rates (table 9) have risen and fallen in recent years, but there has been a significant decrease over the last year where the rate has fallen from 12.7% to 9.9% of the total number of shops . This represents 11% of the floorspace. This is well below the national average of 14.4% for towns monitored by GOAD.

1.8.3 GOAD figures for retail vacancy include both property that is waiting redevelopment and that which is under construction and therefore need to be treated with caution. In many other cases shops have been replaced by a charity shop or discount store that would not be reflected in vacancy figures but has a major effect on the range and quality of retail offer. In other cases retail closures in fringe areas have led to change of use rather than vacancy.

1.9. ACCESSIBILITY

1.9.1 Bridgend is highly accessible. It is located within easy reach of junctions 35, 36 and 37 of the M4. The newly constructed Cross Valley Link Road and the Bridgend Northern Distributor Road have substantially improved accessibility to the town centre from the surrounding catchment area, they provide quick access to the town centre car parks, the bus and train stations.

1.9.2 A new bus station is located on Quarella Road and the railway station on Court Road close to the main concentration of offices. Both provide good public transport accessibility and are within easy walking distance of the town centre. However the distance between the two discourages the convenient interchange between the two public transport modes. The railway station serves trains between London and Swansea via Cardiff which are frequent. The station also serves the Cardiff-Bridgend-Maesteg line which provides an hourly accessibility to Bridgend for the residents of the Llynfi Valley.

1.9.3 Bridgend is currently not pedestrianized and there is a degree of pedestrian/vehicular conflict which makes movement within the town centre difficult, although the situation has improved since the construction of the Bridgend Cross Valley Link Road. The centre is well served by both surface and multi-storey car parks located primarily to the south and east of the town centre. Long stay car parks provide all day parking. Generally the long stay car parks are located at Tremains Road (43 spaces) and Brackla Street No. 1 multi-storey (392 spaces). Short stay parks are provided at the Rhiw (423 spaces) and Brackla Street surface car park (126 spaces).

1.9.4 A shopper survey conducted by Ove Arup and Partners for the Bridgend Town Centre Study showed that there was considerable variation in the use of the car parks. The survey confirmed that car parks located nearest the centre, i.e. the Rhiw multi-storey and Brackla Street surface car park were most used where as the Brackla multi-storey car park primarily serves the Brackla Centre with few users returning into the town centre, this is mainly due to their distance from the town centre.

1.10. PERCEPTION OF SAFETY

1.10.1 It is not possible to assess the level of crime in Bridgend town centre. The Police Authority do not collect information on town centre / car park related crime, so it is difficult to establish how the rate has changed over the years.

1.10.2There is a CCTV system covering the town centre with some shops also having their own surveillance this system. There are some useful guides to improving security which emphasize the importance of deterring crime through a concerted programme, which includes providing positive options for young people and designing spaces so that there is natural surveillance. Lighting in parts of the town centre particularly in subways leading to remote car parks has potential to be improved. These areas could be made more secure by using illuminated modern, bright relatively vandal proof standard lights. This would contribute to improving the town's image.

1.11 ENVIRONMENTAL QUALITY

1.11.1 Bridgend has two covered shopping centres the Rhiw and Brackla centres. The Rhiw centre provides an attractive covered and pedestrianized area of modern shops. The Brackla Centre is located on the periphery of the centre and is in a relatively poor condition due to low levels of investment. Retailers such as Argos, Kwik Save and Iceland are located there.

1.11.2 Environmental improvements have taken place in the town centre in recent years including new street paving and street furniture. However, there still remains a degree of pedestrian/vehicular conflict along the main shopping streets which adversely affects the attractiveness of the shopping centre environment.

1.12 CUSTOMER VIEWS AND BEHAVIOUR

1.12.1 Interviews in town centres and at home can be used to establish the characteristics of shoppers in Bridgend. This covers aspects such as the mode of transport they use, their origins, why they shop there, what they buy, how much they spend, and what other centres they use to do their shopping. Shopper surveys will also help the Council in evaluating the effectiveness of town centre improvements and in setting further priorities. To obtain this information on shopper behaviour would require shopper surveys to be designed, carried out, and analysed which will have resources implications. A shopper survey was undertaken by Ove Arup and Partners in 1995 as part of the Bridgend Town Centre Study and was based on a sample of 269 people interviewed at 10 different locations throughout the centre.

1.13. TURNOVER IN RELATION TO FLOORSPACE

1.13.1 Reliable information on turnover is not generally available at the local level. To obtain accurate information on the turnover and profits of town centre retailers would require a survey of the retailers who may not be willing to provide this kind of information which is of a commercially valuable nature. Turnover can only be broadly estimated through the application of national figures. It is therefore not a suitable indicator of town centre health.

1.14 CONCLUSION

1.14.1 Based upon the above health check analysis of the various indicators for Bridgend town centre, the following main conclusions can be drawn.

- Bridgend town centre has experienced a small increase in prime zone A retail rental values over the last 2-3 years. However, rental values in the secondary zone have been in decline and it is estimated that they have decreased from an average £35 per sq ft in 1995 to £25 per sq ft in 1997.
- The retail floorspace yields for Bridgend of 6.5%-7.25% (1997) is considered average for a town of its size.
- Office rents and yields are again also average for a town of Bridgend's size.
- Over the last 12 years there has been a significant increase in service sector outlets and a decrease in convenience goods outlets.
- There has been an increase in the total ground floor retail floorspace area of Bridgend town centre since 1994. The floorspace has increased from 592,800 sq ft in 1994 to 655,400 in 1997. This amounts to an additional 62,600 sq ft which represents a 9.6% increase.
- The vacancy rate in Bridgend town centre of 9.9% (1997) is well below the national average level of 14.4%.
- The majority of premises in Bridgend town centre (45%) have a floorspace area of less than 232 sq mt.

1.14.2 From the above findings it is considered that Bridgend town centre, taking into account its size and position in the retail hierarchy i.e. that of a sub regional centre, is currently holding its own particularly as it has to compete with the much larger regional centres of Cardiff and Swansea. The town centre is reasonably well provided for in terms of retail and non-retail outlets and has an acceptable balance of national multiple and independent retailers, supported by the services sector including financial institutions. The centre, however, lacks a high quality department store, and there is also a deficiency of leisure and cultural facilities.

1.14.3 The low vacancy rate, rising rental levels in the primary zone , and average yields indicate that Bridgend is still a viable centre with a degree of investor confidence.

1.14.4 Accessibility into the town centre is generally good with numerous car parks, a bus station and rail station. However, there is a need for environmental improvements in certain areas characterized by a poor environment. Pedestrianization should when implemented significantly enhance the retail environment in Bridgend.

1.14.5 The health check is also important for assessing the impact of out of town retail development on town centres. Although some national comparison and convenience goods retailers have in recent years located outside the town centre, new stores have also opened up in the town centre. The demand for floorspace in the town centre remains reasonably strong as evidenced from increasing prime rental values.

1.14.6 On balance therefore the findings show that so far out of town retail development, including foodstores, which has taken place over the past seven years has had an impact on Bridgend town centre which has lost virtually all its bulky DIY, carpets and furniture floorspace together with a substantial part of its electrical and household goods floorspace. The centre has maintained its vitality and viability by evolving and attracting new and different types of retail floorspace such as fashion goods, and by increasing floorspace in the the service sector. However, it is too early to measure any cumulative impact of The Pines Factory Outlet development.

1.14.7The Health Check needs to be repeated at regular intervals, say annually, to assess the future direction of trends already perceived and to enable planning policies to be tailored to ensure that Bridgend Town Centre retains its position in the retail hierachy of South Wales.