RETAILING AND COMMERCIAL CENTRES IN BRIDGEND COUNTY BOROUGH

2003

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PLANNING DEPARTMENT - BRIDGEND COUNTY BOROUGH COUNCIL
CIVIC OFFICES, ANGEL STREET, BRIDGEND, CF31 4WB
Tel. 01656 643165

RETAILING IN BRIDGEND COUNTY BOROUGH 2003

1.1 INTRODUCTION

1.1.1 The protection and enhancement of the viability, attractiveness and vitality of the town and district centres in the County Borough is one of the key objectives of the Bridgend Unitary Development Plan (UDP). To ensure this however, an effective monitoring programme needs to be in place to examine how the Established Commercial Centres (ECCs) of the County Borough are performing on an annual basis.

1.1.2 Town, district and local centres can provide a broad range of facilities and serve as a focus for the community and public transport. They have a range of functions including: market places, business centres and meeting places, as well as providing educational, health, fitness, arts, cultural and entertainment facilities.

1.1.3 Their continuing health depends on them being able to draw enough people to spend time and money in the centre. However, growing competition between centres and the impact of large-scale out-of-centre developments can have a detrimental impact on the function of the centre, calling into question their future economic viability.

1.2 TOWN CENTRE HEALTH CHECKS

1.2.1 In recent years, the focus of retail development has been on Bridgend town and its environs. To this end previous monitoring of the impact of retail developments has been in the form of the annual Bridgend Town Centre Health Check, which is now in its sixth year. Last year, for the first time, Health Checks were introduced for Maesteg and Porthcawl town centres. The three Health Checks are a vital component in assessing the effectiveness of the regeneration of these towns and the vitality, viability and attractiveness of those Town Centres.

1.2.2 The Health Checks (introduced in section 2) will draw on a variety of data from different sources to assess against various 'indicators' as suggested by Central Government. Conducted on an annual basis, as exemplified by the Bridgend Town Centre Health Checks, the quality and attractiveness of all three town centres can be assessed and, where necessary, compared to other centres outside the County Borough and national statistics and trends.

1.3 ESTABLISHED COMMERCIAL CENTRE SURVEY

1.3.1 There are thirteen ECCs within Bridgend County Borough as defined in the adopted Ogwr Borough Local Plan and the emerging UDP, these are within the settlements of: Aberkenfig, Blaengarw, Brackla, Caerau, Nantyffyllon, Nantymoel, Ogmore Vale, Pencoed, Pontycymmer and Pyle/Kenfig Hill, as well as the Town Centres of Bridgend, Maesteg and Porthcawl.

1.3.2 There are well over 1,800 individual properties within the ECCs of the County Borough, and by monitoring their occupancy both the vitality and viability of those Centres and the effectiveness of Development

Plan policies can be assessed. By use of the Council's Geographical Information System (GIS) this data has been plotted onto an Ordnance Survey base, giving an effective visual tool of the performance of the ECC over time. This data (along with the Health Checks) will be particularly useful to Planning Consultants in the course of their submissions of major retail planning applications, and will also aid the Local Planning Authority in its decisions on smaller scale retail developments and regeneration initiatives.

1.3.3 It is envisaged that the use of this data will enable the Local Planning Authority to effectively review its Development Plan policies when they are examined again. This annual survey will be able to identify areas where retailing activity has been permanently lost (i.e. through the demolition or change-of-use of former retail units) and therefore require the boundary of the ECC to be amended to exclude these areas in the next review of the Development Plan. Alternatively, whilst surveying, additional buildings and/or land may be identified which could suit new development for suitable retail / leisure uses and therefore require the boundary to be amended to include new areas.

1.3.4 In Section 6, the data for each ECC is given in alphabetical order by centre, immediately followed by a plan of each centre showing property occupier and use and a short biography.

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TOWN CENTRE HEALTH CHECKS IN BRIDGEND COUNTY BOROUGH

2.1 PLANNING POLICY BASIS OF TOWN CENTRE HEALTH CHECKS

2.1.1 It is an objective of both the Welsh Assembly Government and Bridgend County Borough Council (through the Unitary Development Plan and other initiatives), that the vitality, viability and attractiveness of town, district, local and village centres is enhanced.

2.1.2 *Planning Policy Wales 2002* (paragraph 10.1.3) defines the above terms as follows:

"Vitality is reflected in how busy a centre is at different times and in different parts, attractiveness in the facilities and character which draw in trade. Viability, on the other hand, refers to the ability of the centre to attract investment, not only to maintain the fabric, but also to allow for improvement and adaptation to changing needs".

2.1.3 *Technical Advice Note (Wales) Number 4: Retailing and Town Centres* (1996) expands on this concept by giving advice on the kinds of indicators which can be used to assess the vitality, viability and attractiveness of Town Centres; these are reproduced in Figure 1 below. Collectively compiled and analysed, this data can be used to assess the performance of the Town Centre on a regular basis.

2.1.4 Some of the information suggested will not be available, particularly in the two smaller town centres of Maesteg and Porthcawl. In other circumstances data may be available, but its purchase may not be cost-effective to the Council. However, retail information submitted to support relevant planning applications will be used as a substitute for this.

2.1.5 Town Centre Health Checks were initiated in Bridgend by the former Bridgend Town Centre Regeneration Sub-Committee in May 1998. Since that time there has been an annual survey of that town centre and the data from these checks will be incorporated into this year's survey. For Maesteg and Porthcawl, the 2003 Health Check will build on the data from their initial Health Checks last year, and through subsequent years (when trends can be analysed) data will be used to track the progress of these smaller town centres.

Technical Advice Note (Wales) Number 4: Retailing in Town Centres
Suggested Indicators

Information for Measuring Vitality, Viability and Attractiveness

Turnover in relation to floorspace: turnover figures vary greatly and can be of assistance as an indication of the relative activity of different shopping areas and centres.

Commercial yield on non-domestic property: (i.e. the capital value in relation to the expected market rental) may be of assistance in demonstrating the confidence of investors in the long-term profitability of the centre.

Shopping rents: pattern of movement in primary shopping area rents (i.e. the frontage which attracts the highest rental value);

Retailer representation and change: present representation and demand from the retailers wanting to come into the town, or to change their representation in the town, or to contract or close their representation.

The diversity of uses: how much space is in use for different functions, such as: offices; shopping; other commercial; cultural and entertainment activities; restaurants; hotels; educational uses; housing, and how that balance has been changing;

Accessibility: the ease and convenience of access by a choice of means of travel, including the quality, quantity and type of car parking, the availability of public transport services and the quality of provision for pedestrians and cyclists;

Pedestrian flow: the numbers and movement of people on the streets, in different parts of the centre at different times of the day and evening, and changes over time;

The proportion of vacant street level property: vacancies can arise even in the strongest town centres, and this indicator must be used with care;

Customer views: regular surveys of customer views will assist authorities in monitoring and evaluating the effectiveness of town centre improvements and of town centre management;

Environmental quality: this should include information on air quality, noise, trees, landscaping, open spaces, litter and graffiti;

Perception of safety/occurrence of crime: this should include information on safety and security.

(TAN (W) 4: Paragraph 5 refers)

Figure 1

BRIDGEND TOWN CENTRE HEALTH CHECK 2003

3.1 INTRODUCTION

3.1.1 The 2002 Health Check for Bridgend Town Centre concluded that the centre had remained relatively stable over the previous 12 months, with vitality levels remaining comparable with (and mostly above) many other towns of its size within the South Wales region.

3.1.2 Retail rents remained stable, whilst Office rental rates increased. Retailer representation had extended to include more national retailers. Pedestrian flows were up, and were boosted by the continuing programme of events organised by the Bridgend Festivals Committee throughout the year.

3.1.3 In early 2004, Bridgend County Borough Council commissioned Research and Marketing Limited to undertake a household and street survey regarding people's perception of Bridgend Town Centre (as well as Porthcawl and Maesteg centres) the results of this survey will be highlighted throughout this report.

3.2 RETAIL AND OFFICE FLOORSPACE RENTS AND COMMERCIAL YIELD

Retail Rents

3.2.1 Primary retail floorspace rents (as shown in Figure 2 below) remained the same in Bridgend Town Centre for the fifth year in a row. Whilst this is comparable with Neath, which has also seen static rental levels since 1999, other towns, such as Llanelli and Pontypridd have seen rises over this period. Of the bigger cities, prime retail rents in Newport and Swansea have also remained the same as last year, but Cardiff, the retail powerhouse of the region has seen an approximate 5% growth in rents since 2002.

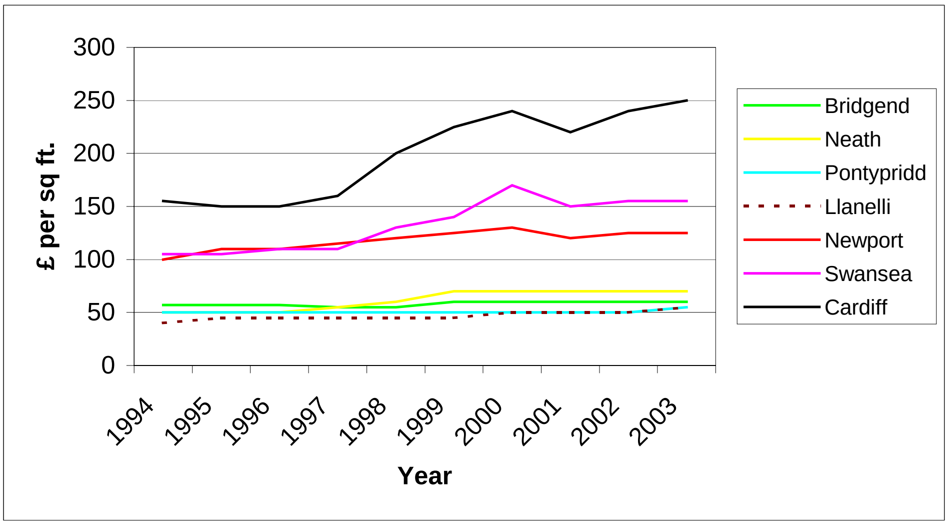

Figure 2 Primary Retail Rents

Source: Colliers CRE

3.2.2 On the other hand rents in the out-of-centre retail parks of the County Borough have risen to £13.50 per sq ft. from £13 in 2002. This figure is likely to continue to rise as the supply of out-of-centre retailing floorspace decreases in light of stricter government retail planning policy.

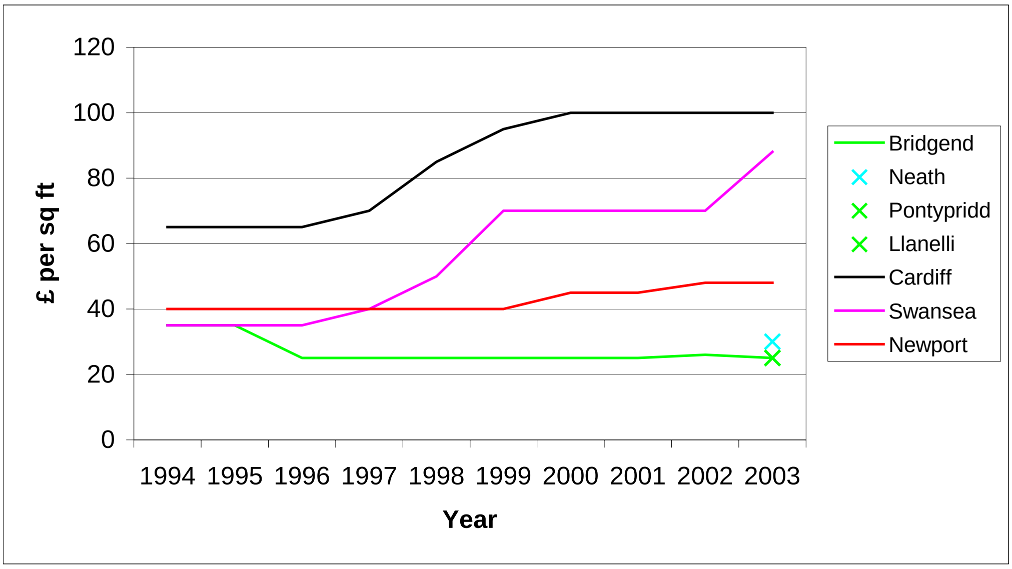

Figure 3 Secondary Retail Rents

Source: Cooke and Arkwright

3.2.3 Secondary retail rents in Bridgend Town Centre fell slightly in 2003 to £25 per sq. ft, losing the nominal rise in this rate which it had experienced the year before. Data provided by Cooke and Arkwright for the first time this year has enabled a comparison of secondary retail rates with towns of a comparable size to Bridgend.

3.2.4 As can be seen from Figure 3 (above), in 2003, Bridgend Town Centre had the same secondary retail rents as Llanelli and Pontypridd (£25 per sq ft). Neath achieved secondary rates of £30 per sq. ft. The progress of Bridgend Town Centre's secondary retail rates in relation to these other centres will now be tracked in subsequent Health Checks. This will enable a more realistic overall comparison of Bridgend to be made against centres of comparable size.

Commercial Yield

3.2.5 Yield indicates investor confidence in a town centre. 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 therefore greater investor confidence. The level of yield broadly represents the market's evaluation of the risk attached to the income from shop rents. It is normally the case that towns with large shopping areas tend to have lower yields than smaller towns.

3.2.6 Growing investor confidence in the town centre has been indicated by the reduction of retail yield in 2003 as indicated by figure 4 below. This is very positive for the future investment potential of the town, particularly as the large centre rates in Cardiff, Newport and Swansea, remained the same over the same period.

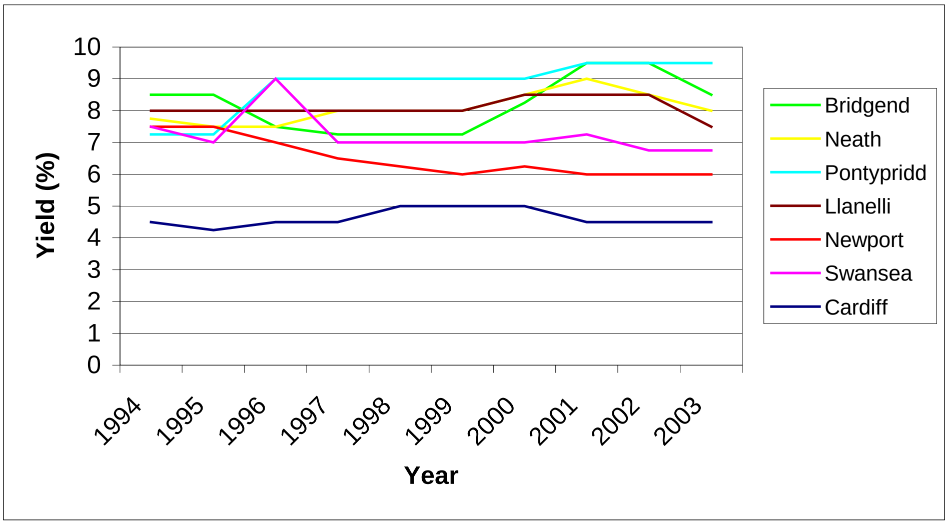

Figure 4 Primary Retail Yield

Source: Valuation Office Agency

3.2.7 This improvement is contrary to the trend experienced in previous years since 1999. In this respect, it was disappointing to note in the consultation draft *Wales Spatial Plan*, the Welsh Assembly Government only chose retail yield to assess the performance of town centres. Given Bridgend's rise in yield rates in the period 1999 - 2002 it was assessed in that document as having a moderate - weak retail performance with a 'weakening recent trend'. Representations have been made to the Welsh Assembly Government by the County Borough Council that using this one indicator of vitality is very crude and indeed contrary to its own advice on assessing town centre performance (see Section 2 above).

Office Rents

3.2.8 Prime office rents in Bridgend hit £14 per sq ft in 2003, equalling that of Newport and rising above Swansea (see figure 5 below). This is certainly good news for commercial confidence in Bridgend. However the rise in rents could be related to the short supply of quality office accommodation in the town centre. This shortage should be rectified, however, due to the completion of the Ravenscourt office development, adjacent to Brewery Lane, and the redevelopment of the former Chest Clinic on the corner of Court Road and Nolton Street into high quality offices.

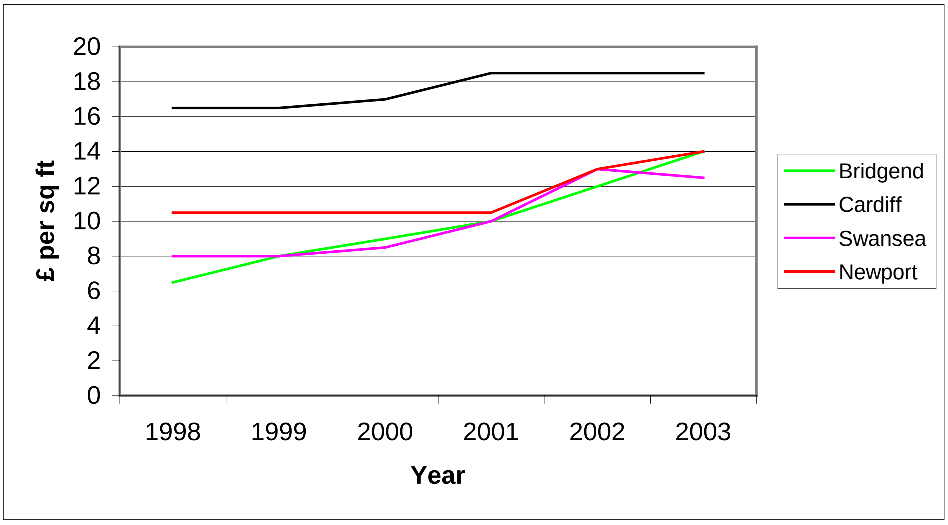

Figure 5 Prime Office Rents

Source: Cooke and Arkwright

3.3 Retailer Representation & Change and Diversity of Uses

How do you rate: Range and Choice of Services?
62.3%: good or very good; 17.4%: neither good nor poor; 16.6%: poor or very poor
Range and Choice of Non-Food Shops?
37.8%: good or very good; 23.5% neither good nor poor; 35.1% poor or very poor
Range and Choice of Food Shops?
36.5%: good or very good; 18.6% neither good nor poor: 38.3% poor or very poor
Source: RMLtd Telephone Survey

3.3.1 Table 1 below shows the results of 2003 Bridgend Retail Survey for Bridgend Town Centre. The number and type of convenience goods outlets has remained the same. There has been a small movement in the number of comparison goods stores, up 3 on the previous year. The service sector continues to do well in Bridgend town centre, increasing by 4 units on the previous year.

3.3.2. Most encouraging is the decrease in the vacancy rate which, in 2003, fell to 11.35% of total units and 9.34% of floorspace (see section 6). These are comparable with the national average of 10.48% and 7.93% respectively.

3.3.3. Whilst the figures look encouraging, it should be noted that there have been no new national multiple retailers locating to Bridgend Town Centre during 2003. Conversely there has been an increased presence of locally-based shops and services within the primary shopping areas of the centre, which are usually the preserve of the national-multiple store, especially Caroline Street.

3.3.4. Public perceptions of the range of services however is encouragingly positive, with over 60% rating it as good or very good. This reflects the diverse range of financial and other non-retail services available to patrons of the town centre. With regard to the range and choice of shops, the public is more-or-less equally divided.

Convenience Goods	1999*	2000*	2001*	2002#	2003#
Bakers & Confectioners	7	7	6	5	5
Butchers & Poulterers	1	1	1	1	1
Grocery	6	6	6	5	5
Off licences / Confectioners / Tobacconists / Newsagents	2	2	2	2	2
Total	**16**	**16**	**15**	**13**	**13**
Comparison Goods					
Footwear and Repair	9	9	9	6	6
Mens and Boys Wear	6	5	3	4	4
Womens, Girls, Children and General Wear	30	29	29	26	27
Furniture, carpets & textiles	13	13	14	13	13
Booksellers, arts, crafts, stationers, copy bureaux	13	12	14	9	10
Electrical, gas, music & photographic	16	15	18	20	21
DIY, hardware & housewares	7	7	5	6	5
China, glass, fancy & leather goods	9	10	8	6	8
Cars, motorcycles & motor accessories	2	2	2	1	1
Chemists, drug stores & opticians	10	10	11	13	13
Variety, department & catalogue	3	3	5	7	7
Florists, nurserymen & seedsmen	3	3	2	3	2
Toys, hobby, cycle & sports	13	11	11	9	9
Jewellers & repair	8	8	7	9	8
Other	7	7	8	13	14
Total	**149**	**144**	**146**	**145**	**148**
Service					
Restaurants, coffee bars, fast food & takeaways	34	33	36	36	38
Pub / Club				18	19
Hairdressers, beauty parlours & health centres	25	25	24	20	21
Laundries and Dry Cleaners	1	1	1	1	1
Travel Agents	8	8	7	7	7
Banks, Building Societies and Financial Services	22	21	22	25	26
Estate Agents and Valuers	12	12	9	13	12
Professional Services				13	18
Other	4	5	5	23	18
Total	**106**	**105**	**104**	**156**	**160**
TOTAL COMPARISON / CONVENIENCE / SERVICE	**271**	**265**	**265**	**314**	**321**
VACANT UNITS	**26**	**33**	**35**	**57**	**53**
VACANT UNITS (% OF TOTAL)	**8.75**	**11.07**	**11.63**	**12.20**	**11.35**
RESIDENTIAL PROPERTIES				**60**	**60**
TOTAL OTHER PROPERTIES	**4**	**5**	**5**	**36**	**33**
TOTAL	**271**	**265**	**261**	**467**	**467**
Sources: * = Experian Goad # = Bridgend CBC					

Table 1 Retail Provision in Bridgend Town Centre

3.3.5 The construction of the proposed 8680 sq. m (gross) Asda store at Cheapside would act as a major catalyst, giving impetus to private developers to redevelop existing centres / stores or to develop the Key Retail Redevelopment Sites allocated in the Unitary Development Plan. The attraction to shoppers of such a large development would also draw in other national multiple retailers who would wish to capitalise on the growth in movements across the town centre to the new foodstore.

3.3.6 In relation to this, Table 2 highlights (as last year) the fact that the majority of outlets in the town centre are below 2,499 sq. ft. in size. Whilst this unit size tends to encourage small, locally generated business enterprise, they do not provide flexibility for major retailers who require larger units in a town the size of Bridgend. It is envisaged that the development of the Asda store and the associated spin-offs described above will go some way in rectifying the situation.

Distribution of Outlets by Size	**Number**	**%**
Under 1,000 sq ft.	222	47.54%
Between 1,000 and 2,499 sq. ft.	161	34.48%
Between 2,500 and 4,999 sq. ft.	49	10.49%
Between 5,000 and 9,999 sq. ft.	22	4.71%
Between 10,000 and 14,999 sq. ft.	9	1.93%
Between 15,000 and 19,999 sq. ft.	3	0.64%
Between 20,000 and 29,999 sq ft.	1	0.21%
30,000 sq. ft. and above	0	0.00%
Total	**467**	**100.00%**

Table 2 Outlet Size Distribution

Source: Bridgend CBC

Bridgend Market

3.3.7 For the first time in 2003, the composition of Bridgend Market was also surveyed, as it makes an important contribution to both the comparison and convenience goods offer of the town centre.

BRIDGEND MARKET - 2003	**No. of Units**
Convenience	
Butchers and Poulterers	4
Grocery	1
Off Licences / Confectioners / Tobacconists / Newsagents	1
Total	**5**
Comparison	
Footwear and Repair	1
Womens, Girls, Children and General Wear	4
Furniture, carpets and textiles	1
Booksellers, Arts, Crafts, Stationers, Copy Bureaux	3
Florists, Nurserymen and Seedsmen	1
Toy, Hobby, Cycle and Sports	2
Jewellers and Repair	2
Total	**14**
Service	
Restaurants, Coffee Bars, Fast Food and Takeaways	4
Hairdressers, Beauty Parlours and Health Centres	1
Total	**5**

Table 3 Retail Provision in Bridgend Market

Source: Bridgend CBC

3.3.8 Table 3 above shows just how much this contribution is, as the market provides 5 additional convenience units, 14 comparison goods and 5 service units which would not have been accounted for in either the

County Borough's annual survey nor through commercially provided data. This data shall be collected in forthcoming Health Checks so that the health of Bridgend Market can also be assessed in relation to the town centre.

3.4 Pedestrian Flow

3.4.1 Pedestrian flow is one of the most basic measures to reflect the vitality of a centre. The more people on the street, the livelier the centre will feel.

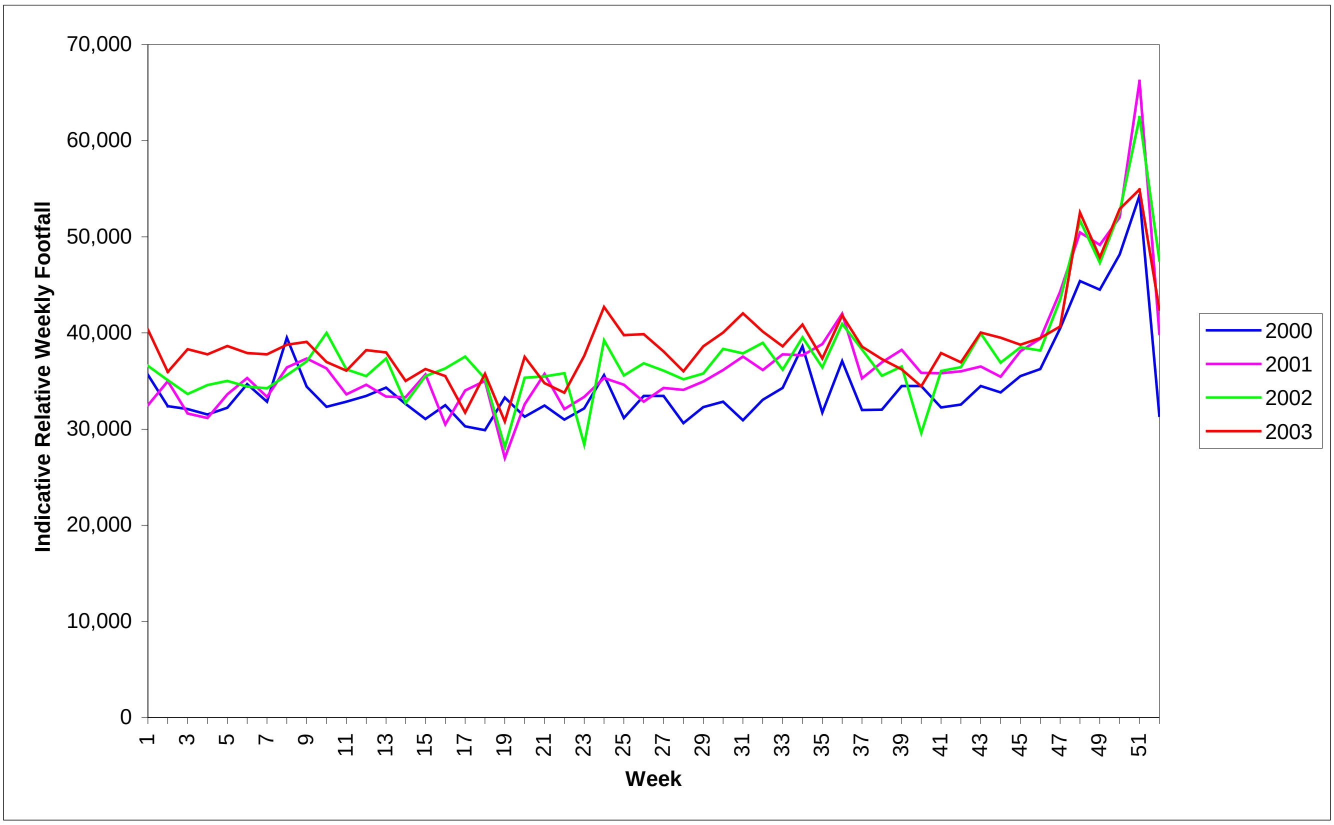

Figure 6 Weekly Footfall Figures - Rhiw Shopping Centre

Source: Rhiw Shopping Centre Management

3.4.2 Weekly footfall figures for the Rhiw Shopping Centre show, on average, a 3.3% increase in the numbers of people visiting this prime shopping area between 2002 and 2003[1]. This is an increase on the previous year's rise of 2.5%. National data provided by *Footfall* suggests that visits to shopping centres in 2003 were consistently below or at best equal to levels in 2002. Therefore in terms of attractiveness to visitors, Bridgend performed better than average when compared with other centres across the country. This is no doubt helped by the successful cultural events held in the town throughout the year.

3.4.3 In 2004 the County Borough Council will install electronic pedestrian counting devices in primary and secondary locations around the town

[1] The pedestrian counts are taken during sample surveys and do not represent the total number of pedestrians using the centre. The flows are taken at different times of the day during busy, medium and low flow periods. The count is for the number of people passing a particular point at a particular time. The total flow counts are therefore directly comparable for each week, and with previous years.

centre. These will enable a more accurate picture of patronage of the town centre to be given in future Health Checks.

3.5 ACCESSIBILITY

60.5% of Bridgend Town Centre arrive by car as driver; 13.4% as a passenger; 13% by bus; 9.3% walk; 2.1% by train; and 1.2% by taxi.

24.7% of users considered Bridgend Town Centre to have good or very good access; 10.7% thought it was neither good nor poor; 35.8% thought it was poor or very poor; 28.8% didn't know.

64.2% of users thought that the Town Centre was very good or good in terms of pedestrian friendliness. 13.6% considered it to be neither good nor poor, whilst 13.7% thought it was poor or very poor; 8.4% did not know.

17.6% of users of Bridgend Town Centre consider the cost of car parking to be very good or good; 20.8% thought it was neither good nor poor; 43.7% consider it to be poor or very poor; 17.9% did not know.

Source: RMLtd Telephone Survey

3.5.1 The town centre has retained its high levels of accessibility during 2003. The redevelopment of the bus station however has meant a temporary shift of focus for bus services to Cheapside. This, coupled with implementation of phase four of the pedestrianisation and environmental improvements at the War Memorial in Dunraven Place, has led to the imposition of a vehicle prohibition order from Queen Street to Market Street.

3.5.2 Despite the ongoing works to the bus station, bus service provision, both internally within the County Borough and beyond has remained strong. The railway continues to provide regular commuter and long-distance services to and from Bridgend Station. The level of car-parking provision has remained good and has increased in the town centre during 2003 due to new parking provision at the former Palais de Dance site. (see table 4 below).

CAR PARK	NUMBER OF SPACES
Tondu Road	89
Tesco	269
Tremains Road	43
Bridgend Railway Station	91
Brackla Surface	126
Kwik Save	71
Rhiw Centre	423
Brackla Long Stay	392
Brackla Short Stay	353
Bowls Hall	97
Recreation Centre	115
Swimming Pool	40
Embassy Cinema -Palais de Dance	88
TOTAL	**2197**

Table 4 Car Parking Provision in Bridgend Town Centre - 2003

Source: Bridgend CBC

3.5.3. The public perception survey revealed that over a quarter of people arrive in the town centre by means other than the private car, with many using public transport, which is very sustainable. However this could also be in part due to the cost of car parking, which the majority of people considered to be too high.

3.5.3 Whilst almost 36% of people considered access to Bridgend Town Centre to be poor or very poor, this should be considered against the fact that the ongoing physical works and the redevelopment of the bus station will have altered people's opinions in the short term. This is offset by the fact that 62% of people consider Bridgend to be pedestrian friendly.

3.6 CUSTOMER VIEWS

3.6.1 As mentioned in section 3.1 above, and has been featured throughout this report, the County Borough Council commissioned Research and Marketing Limited to undertake a town centre perception survey in early 2004. This survey consisted of telephone and on-street interviews. Whilst it is not possible to present all of the results in this report, below are selected questions and their respective results:

<u>Main reason for visiting the town centre</u>

Non-food shopping: 47.4%; Food and Grocery Shopping: 14.4%; Work / Business: 10.5%; Financial Services: 9.3%; Window Shopping: 5%;

<u>Where people came from</u>

Home: 86.2%; Work: 11.1%

<u>Average journey time to town centre</u>

18 minutes

<u>Frequency of visits</u>

Daily: 22.5%; 2-3 times a week: 29.5%; Weekly: 23.3%; Fortnightly: 7.3%; Monthly: 6.8%; Less Often: 8.8%

<u>Average spend in town centre</u>

Non-food: £18.85; Food: £7.06

<u>Average length of time spent in Bridgend</u>

122 minutes (just over 2 hours)

<u>What people most like about the town centre</u>
Nothing/very little: 20.1%; Familiarity: 12.3%; Good non-food shops: 11.8%; All shops in same place: 8.5%; Easy to get to by on foot: 8.2%; Easy to get to by car: 8%; Good food shops: 7%; Good range of services: 4.2%; Atmosphere: 3.5%…

What people most dislike about the town centre

Nothing/very little: 26.1%; Poor range of non-food shops: 17.3%; Difficult to park: 5.7%; Poor range of food stores: 5.5%; Traffic: 4.5%; Poor unattractive environment: 3.8%; Cost of Car Parking: 3.8%; Poor choice of places to eat/drink: 3.2%; Streets dirty / badly maintained: 3.2%

What improvements to Bridgend could be made to meet day-to-day needs

More/better non-food shops: 23%; Nothing: 13.1%; More/better car parking: 8.2%; More/better food shops: 6.7%; More/better seating: 5.8%; Cheaper parking: 5.7%; Cleaner Streets: 4.7%; Better public transport: 4%; Trees / flower displays / landscaping: 2.3%.

3.7 PERCEPTION OF SAFETY / OCCURRENCE OF CRIME

64.8% of users of Bridgend Town Centre said it had a good or very good feeling of safety and security. 21.2% thought it was neither good nor poor; 10.3% considered it to be poor or very poor.

Of those who considered it to be poor or very poor:
46.8% said it was due to 'Young people hanging about'
36.4% said it was due to 'evidence of anti-social behaviour'
14.3% said it was due to 'reputation / perception / press reports'

Source: RMLtd Telephone Survey

3.7.1 For the first time, data has been provided by South Wales police on the occurrences of crime in the town centre.

3.7.2 Figures 7, 8 and 9 (overleaf) contain information relating to crime statistics in Bridgend Town Centre. It should be stressed that this data refers only to occurrences of crime reported to the police and will not reflect the total number of incidents. Whilst total thefts from shops had risen up to 2001, for the past two years the number of reports of shop-lifting have fallen.

3.7.3 In terms of public order offences, it is reassuring to note that the occurrences violent behaviour offences are low and this is reflected in the majority of the public's view that the town centre has a good or very good feeling of safety and security. However, reported cases of Grievous Bodily Harm and Actual Bodily Harm are on the increase. In terms of the general location of the occurrences of crime, figure 9 indicates that most Public Order Offences occur in the Derwen Road, Wyndham Street and Market Street areas of the town centre. Not surprisingly, these areas have the highest concentration of pubs, bars and nightclubs in the town centre, which are associated with anti-social behaviour, particularly when these establishments close for the night.

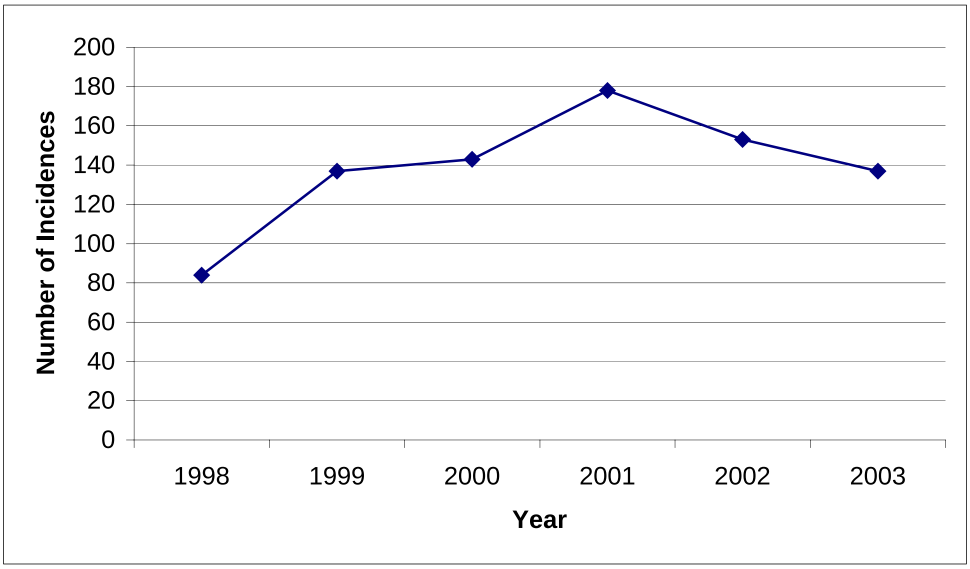

Figure 7 Reported Incidences of Theft from Shops

Source: South Wales Police

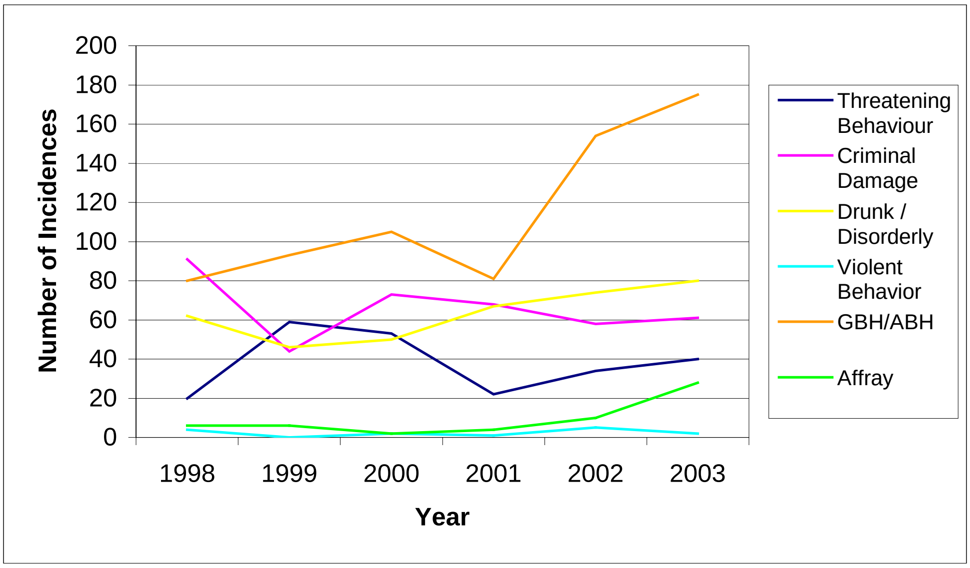

Figure 8 Reported Public Order Offences in Bridgend Town Centre by Category

Source: South Wales Police

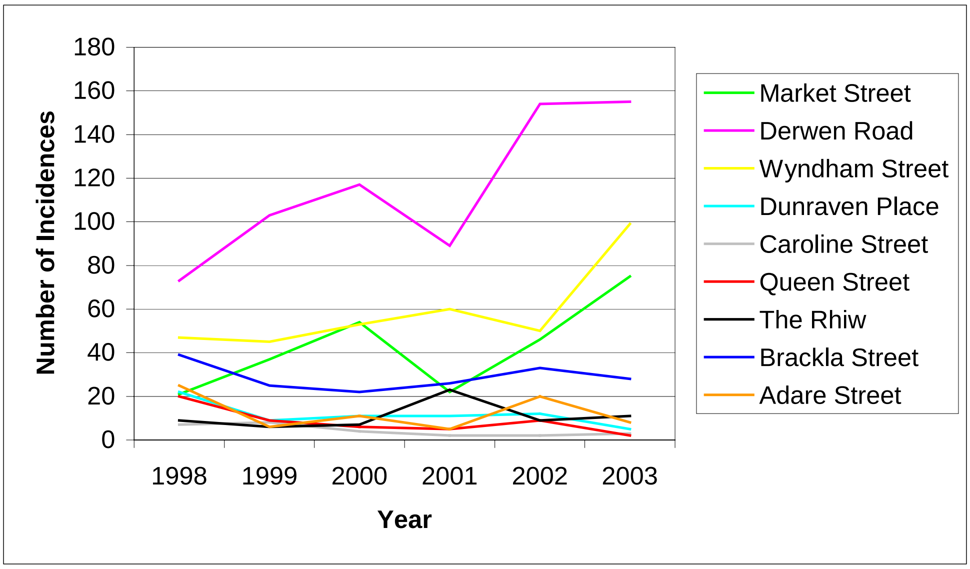

Figure 9 Reported Total Public Order Offences in Bridgend Town Centre by Location

Source: South Wales Police

3.8 Environmental Quality

41.5% of users consider Bridgend Town Centre to have a very good or good quality of environment; 23.6% thought it was neither good nor poor; 33.5% considers it to be poor or very poor.

Source: RMLtd Telephone Survey

3.8.1 The ongoing pedestrianisation, public realm improvements and grant-aided building improvements continue to improve the environmental quality of the town centre. This can explain the mixed views from the public, some of whom would base their views on work which has been completed and some of whom would be reflecting the continuing work which is causing some disruption. In late 2003, Phase Four of the works were completed around the War Memorial in Dunraven Place (see pictures below). Preliminary design work was also carried out with regard to other areas of the town centre in 2003 including enhancement proposals for Areas 3 (Queen Street / Dunraven Place), 1 (Market Street), and 5 (Court Road) by McGregor Smith.

Figure 10 The War Memorial Before and After Pedestrianisation Works

Credit: Bridgend CBC

3.8.2 In 2003 a consultants brief was prepared for the formulation of a Development Brief for the Elder Street site area. The aim of the commission will be to consider and determine the potential of the Elder Street site to provide a range of uses within the existing listed buildings and in new development of the site. It is envisaged that there will be considerable progress on this brief and subsequent development proposals during 2004.

3.8.3 The BCBC/WDA sponsored Town Improvement Grant (TIG) scheme is still in operation. In 2003, over £130,000 was distributed in grants to eight schemes in the town centre. A TIG brochure explaining the grants available was produced in 2003 and is available from the Conservation and Environmental Policy Section of the Council's Planning Department to anyone interested in the scheme.

3.9 National Vitality Score

3.9.1 Finally, Experian Goad produce an annual *Retail Centre Ranking* report which gives 250 centres across the UK a 'vitality index', expressed against London's West End, which has vitality of 1,000. For 2003, the data has been reclassified into Regions.

3.9.2 In the Wales region Bridgend has been ranked tenth, a relative drop of 1 place on last year's positions. In South Wales, whilst the towns (along with the major cities) of Cwmbran and Carmarthen are above Bridgend, it is still ranked above Neath, Llanelli, Merthyr Tydfil and Pontypridd.

3.10 CONCLUSIONS

' During the last 5 years, how far do you agree that Bridgend has become a nicer place to visit or shop?'
Strongly Agree: 17.1%
Slightly Agree: 31.4%
Neither Agree nor Disagree: 31.4%
Slightly Disagree: 16%
Strongly Disagree: 22%
Don't know: 4.3%
Source: RMLtd Telephone Survey

Economic Indicators

3.10.1 In economic terms the retail sector in Bridgend had a difficult year in 2003, with static and decreased primary and secondary retail rents respectively. However, with the indicated decrease in retail yield, this could point to a renewed investor interest in the town centre. The real bonus to the town centre is that it achieved the same office rental rates figures as Newport, and greater than Swansea. With new commercial office developments due to completed in Bridgend in 2004; this will aid in the town's ability to maintain these buoyant rates.

3.10.2 In terms of economic confidence in terms of investment, no new national multiple retailers have located to the town in 2003 and the trend of more locally-based retailers in the prime-shopping areas had been identified. This is offset by another fall in vacancy rates and a rise in footfall. Public opinion is divided as to whether the range of choice of shops is good or bad. However, if Bridgend wishes to maintain it's place or increase it's presence in the regional retail hierarchy it must start attracting more multiples to the town centre.

Social Indicators

3.10.3 Accessibility continues to remain high for people trying to get to the town centre, and from the perception survey the majority of the public think that the town centre is pedestrian friendly. One major issue for users is the cost of car parking in the town centre with almost 44% saying the cost was poor.

3.10.4 The perception survey has also identified many other issues in the town:

1) The majority of patrons come from their home and arrive in less than 20 minutes;
2) The majority of people come to the town centre more than once a week, and spend an, on average, over 2 hours in the centre.

This demonstrates that Bridgend does have enough attractors to encourage people to stay for prolonged periods.

3.10.5 When it comes to likes and dislikes, the public were more ambivalent. With approximately the same number of people indicating there was nothing or very little they particularly liked or disliked about the town. However, once again, better shops were identified as being the most needed improvement. One way of achieving this would be the construction of the Asda store, which is discussed in section 3.3 above.

Environmental Indicators

3.10.6 The ongoing pedestrianisation and public realm investment continues to improve the environment of the town centre; these projects will continue into 2004 and beyond. The Town Improvement Grant scheme continues to support private individuals who may wish to renovate their premises. Whilst, again, public perception of environmental quality is mixed, this will probably remain the case until all the major works are completed and the public can begin to appreciate fully the improvements which have been made and the benefits that they bring.

Conclusion

3.10.7 Bridgend Town Centre continues to produce both positive and negative indicator reports in this year's Health Check. This is understandable as the centre continues to experience disruption due to the work necessary to implement pedestrianisation and the physical regeneration schemes. This is certainly apparent in the mixed results from the public perception survey. Given the amount of disruption and the scale of works involved it certainly is a reasonable and positive conclusion that the town centre has continued to 'hold it's own' during this difficult time and this is a testament to the way in which the regeneration strategy has been implemented.

3.10.8 However, whilst the environmental improvements are certainly making the centre achieve a more pleasant environment, in terms of the important economic indicators of attracting increasing rentals and more well-known high street names, it is seriously behind its sub-regional competitors. This coupled with the Unitary Development Plan Public Inquiry Inspector's opinion that: "*Bridgend Town Centre is not as healthy as it might be"*, the Council, along with its partners, needs to be more proactive in achieving the economic as well as the environmental regeneration of the town centre. This has already begun in Elder Street / Dunraven Place and by granting consent for, and supporting the development of the proposed Asda store at Cheapside. This proactive approach however needs to be rolled out further into the centre.

PORTHCAWL TOWN CENTRE HEALTH CHECK 2003

4.1 INTRODUCTION

4.1.1 The Porthcawl Town Centre Health Check assesses the overall performance of Porthcawl town centre against the relevant indicators set out in TAN 4 (Wales). The comparative basis for this study area is in some way limited due to this being only the second health check for the town to be carried out by the County Borough Council. In early 2004, Bridgend County Borough Council commissioned Research and Marketing Limited to undertake a household and street survey regarding people's perception of Porthcawl Town Centre (as well as Bridgend and Maesteg centres) the results of this survey will be highlighted throughout this report.

4.1.2 The seaside resort of Porthcawl is located within 5 miles of junction 47 of the M4, approximately mid way between Cardiff and Swansea. The town is one of the primary resorts on the southeast coast of Wales and has a significant retirement and commuter residential base with a population of around 16,100.

4.1.3 Porthcawl's retail area is concentrated along the pedestrianised John Street, where the main retail multiples and key service providers, such as banks and building societies are located. John Street currently benefits from the occupation of a number of multiple convenience and comparison occupiers including Woolworths, Boots, Peacocks and Clarks. The major high street banks and building societies are also represented. However, the town lacks a major store to attract shoppers and anchor the town centre as a whole.

4.2 Porthcawl Regeneration

4.2.1 For some considerable time, Porthcawl has experienced the structural problems found in most British seaside resorts. Improvements in air travel and cheap package holidays have resulted in the shift to foreign holidaymaking. It can be said that towns like Porthcawl have born the brunt of such a phenomenon and now offers what some would argue is a ‘dated product’. The emerging Porthcawl Regeneration Strategy is an attempt to redress such decline by proposing to deliver a modern regeneration ‘package’.

4.2.2 CDN Planning have been commissioned by Bridgend County Borough Council to prepare a Development Framework for the Regeneration Area identified in the Unitary Development Plan. The area is located at the heart of Porthcawl. Halcrow (Marina, Highways, Landscape and Engineering issues) and Alder King (market conditions and viability) have provided additional inputs.

4.2.3 The regeneration of the foreshore and former dockland environments provides a unique and exciting opportunity for the community to create a vibrant new focus that will create social, economic and environmental benefits for the town itself and the wider area. The scale of the regeneration site; its southerly outlook; its expansive views of the Bristol Channel and English coast beyond; and its relationship with the existing town create a set of local characteristics that are unique not only in the context of Welsh seaside towns but within the UK itself.

4.2.4 The draft development framework seeks to:

• Realise the potential of Porthcawl waterfront, centre and environs, as a focus for residents, visitors, shoppers and workers.
• Retain and reinforce the positive attributes of the area and enhance its attractiveness.
• Provide a flexible framework for both public and private investment.
• Establish a development framework that will assist in establishing a consensus for change.

4.2.5 The draft development framework for the Porthcawl Regeneration Area, together with an independent 'Sustainability Appraisal' has been the subject a full public consultation and comment exercise.

4.2.6 Due to the Regeneration Areas close relationship with the town centre, the regular monitoring of the town centre’s ‘health’ and assessment of its vitality and viability will enable planning policies to be tailored to ensure that the regeneration of the area is a success.

4.3 RETAIL AND OFFICE FLOORSPACE RENTS

4.3.1 The primary retail floorspace rents remained static in Porthcawl Town Centre in 2003, at £27-£28 per sq. ft. . The current level of retail rents is still quite low, which exemplifies the weak nature of Porthcawl’s retail core. It is also interesting to compare Porthcawl’s retail centre to other centres of similar size within the County Borough such as Maesteg. Prime retail rents in Maesteg are within the low to mid £20’s and therefore lower than rents in Porthcawl. Such a comparison suggests that locally there is stronger retailer confidence in Porthcawl, which to some extent may be explained higher levels of wealth and affluence in the local catchment area, and greater accessibility to the M4 corridor.

4.3.2 When compared to other South Wales seaside towns, Porthcawl is faring a little better then Penarth, which has a prime retail rent of £26 per sq.ft. It is not faring as well as Barry town centre which is achieving around £43 per sq.ft, however Barry town centre does serve a much larger population base than Porthcawl.

4.3.3 In terms of office rents in Porthcawl there is very limited information available. Due to the lack of new evidence over the last 12 months national and local letting agents consider the best figures available are those for 2002, which stand at £10 per sq. ft. (prime) and £7 per sq. ft. (secondary). Office rent figures in Porthcawl will be kept under review and updated in subsequent town centre health checks when information is available, aiding future comparative analysis.

4.4 RETAILER REPRESENTATION, CHANGE AND DIVERSITY OF USES.

How do you rate: Range and Choice of Services?
61.3%: good or very good; 18.3%: neither good nor poor; 17.2%: poor or very poor
Range and Choice of Non-Food Shops?
32.2%: good or very good; 24.5% neither good nor poor; 41.1% poor or very poor
Range and Choice of Food Shops?
26.7%: good or very good; 18.3% neither good nor poor: 50.1% poor or very poor
Source: RMLtd Telephone Survey

4.4.1 Table 5 below, shows the results of the 2003 Bridgend Retail survey for Porthcawl Town Centre. It indicates that Service Sector outlets continue to dominate the Town Centre in 2003. In terms of Comparison and Convenience goods, in 2003 over 28% of all units were comparison outlets, where as, only 5% of all units were convenience outlets. There has been a slight increase in both convenience and comparison outlets over the last year.

4.4.2 Over the same period there has been a decrease in the number of service sector outlets from 92 in 2002 to 87 in 2003. However, the service sector continues to play an important role within Porthcawl with 33% of all the units attributed to this sector. It should be noted that this is 6% higher than comparison outlets. An explanation for the high percentage of service outlets and in particular A3 outlets in Porthcawl (which accounts for greatest proportion of all service outlets – 33%) is that it reflects the tourist nature of the town. The importance of the Service sector is also reflected in public perception of the range of services offered in the town centre with over 61% rating this sector as good or very good.

4.4.2 There are only 2 foodstores in Porthcawl; a Somerfield on Lias Road and a small Spar on John Street. Neither provides the retail offer for a typical bulk shopping trip. This is emphasised by 50% of patrons of the town centre rating the choice of Food Shops in Porthcawl as poor or very poor. A detailed analysis of food shopping patterns in the County Borough, by Colliers CRE in 2002, has also shown that there is a deficiency in food shopping in the Porthcawl Area with many residents travelling to Bridgend to conduct their grocery shopping. The Council has therefore allocated land at the Hillsboro Place Car Park and adjoining land for new large-scale convenience retailing, together with a smaller element of comparison goods to help redress the balance.

4.4.3 From 2002 to 2003 the number of vacant outlets in Porthcawl increased from 12 to 14 outlets. Vacancy levels are an important indicator of vitality and viability, but should be used with care, as vacancies can arise in the strongest towns. Despite this increase in vacancy levels, it should be pointed out that vacant properties account for only 5.28% of all properties surveyed in 2003 and is well below the national average of 10.48%. The low vacancy level suggests that Porthcawl is able to attract and retain independent retailers.

PORTHCAWL	2002	2003
Convenience Goods		
Bakers & Confectioners	3	3
Butchers & Poulterers	2	2
Grocery	5	5
Off licences / Confectioners / Tobacconists / Newsagents	2	3
Total	**12**	**13**
Comparison Goods		
Footwear and Repair	4	4
Men's and Boys Wear	0	0
Women's, Girls, Children and General Wear	16	14
Furniture, carpets & textiles	7	8
Booksellers, arts, crafts, stationers, copy bureaux	8	8
Electrical, gas, music & photographic	6	8
DIY, hardware & housewares	3	2
China, glass, fancy & leather goods	1	1
Cars, motorcycles & motor accessories	1	1
Chemists, drug stores & opticians	7	7
Variety, department & catalogue	4	4
Florists, nurserymen & seedsmen	0	0
Toys, hobby, cycle & sports	3	4
Jewellers & repair	4	4
Other	9	9
Total	**73**	**74**
Service		
Restaurants, coffee bars, fast food & takeaways	17	20
Pub / Club	7	7
Hairdressers, beauty parlours & health centres	10	7
Laundries and Dry Cleaners	2	2
Travel Agents	5	4
Banks, Building Societies and Financial Services	7	7
Estate Agents and Valuers	6	6
Professional Services	8	8
Other	30	26
Total	**92**	**87**
TOTAL	**177**	**174**
VACANT UNITS	**12**	**14**
VACANT UNITS (% OF TOTAL)	**4.50%**	**5.28%**
TOTAL OTHER PROPERTIES	78	77
TOTAL PROPERTIES SURVEYED	267	265
Sources: Bridgend CBC		

Table 5

4.4.4 Table 6 illustrates that just under half of all properties surveyed in 2003 are below 1,000 sq. ft in size. This suggests that Porthcawl does well in encouraging small independent retailers serving local needs, however it does not provide the flexibility for major retailers who require large stores.

Distribution of Outlets by Size		
Under 1,000 sq ft.	129	48.68%
Between 1,000 and 2,499 sq. ft.	106	40.00%
Between 2,500 and 4,999 sq. ft.	20	7.55%
Between 5,000 and 9,999 sq. ft.	8	3.02%
Between 10,000 and 14,999 sq. ft.	1	0.38%
Between 15,000 and 19,999 sq. ft.	0	0.00%
Between 20,000 and 29,999 sq ft.	1	0.38%
30,000 sq. ft. and above	0	0.00%
Total	**265**	**100%**

Table 6

4.4.5 The size and shape of units on John Street impose restrictions when catering for the larger store formats. This situation could change with any re-development / extension of the town centre. There is the possibility of several outlets combining to form one larger unit. The 2003 survey has shown that this has occurred on a small scale and explains the fall in the total number of units surveyed.

4.4.6 Porthcawl Town Centre currently benefits from the occupation of a number of multiple comparison and convenience retailers, which include:

Comparison Goods:
Birthdays
Boots
Clarks
New Look
Peacocks
Stead & Simpson
Superdrug
Seconds Ahead
Woolworths

Convenience Goods:
Greggs
Somerfield
Spar
Sweetmans
Victoria Wine

4.4.7 The above list is rather limited and serves only very local needs i.e. the needs of the local incidental food and non-food shopper. The town also lacks a major store to attract shoppers and to anchor the town centre as a whole.

4.4.8 Overall, Porthcawl offers a relatively diverse range of uses. In addition to shopping, the town centre caters for pubs, restaurants and household services as well as a library and a museum. Porthcawl town centre serves as a tourist destination and contains a mix of uses appropriate to a small coastal town.

4.5 PEDESTRIAN FLOW

4.5.1 It is difficult to assess changes in pedestrian flows over a period of time for Porthcawl town centre because there is no published pedestrian flow information available to enable comparisons to be made. However, from observation, there appears to be a moderate to high flow along the pedestrian section of the prime pitch along John Street. John Street facilitates the linear movement pattern of shoppers which occur between Somerfield and Woolworth at each end of the primary centre. Low flows are most apparent on the periphery of the centre i.e. in the secondary shopping area of New Road. New Road is separated from the core centre by the A4106 dual carriageway, which impedes movement into the area. A pedestrian subway links the north end of John Street with the secondary shopping area of New Road. However, the fact that it runs under the road means it is not very 'user friendly', which could explain the low foot flows which are apparent in New Road. Better signage from the pedestrianised part of John Street could help in encouraging visitors to explore the New Road shopping area. This is an area where further survey work is needed to enable proper monitoring.

4.6 Accessibility

43.6% of respondents travel to Porthcawl Town Centre by car as driver; 17.4% as a passenger; 11.5% by bus; 27.2% walk; and 0.3% by taxi.

45.9% of users considered Porthcawl Town Centre to have good or very good access by Public Transportation; 42.6% thought it was neither good nor poor; 10.1% thought it was poor or very poor; 1.3% didn't know.

86.8% of users thought that the Town Centre was very good or good in terms of pedestrian friendliness. 9.2% considered it to be neither good nor poor, whilst 3% thought it was poor or very poor; 1.0% did not know.

37.7% of users of Porthcawl Town Centre consider the cost of car parking to be very good or good; 33.4% thought it was neither good nor poor; 28.9% consider it to be poor or very poor.

Source: RMLtd Street Survey

4.6.1 Porthcawl town centre is highly accessible by car, bicycle and public transport. The town is located within easy reach of the M4 and has a good link road to junction 37. Accessibility for pedestrians within the town has increased in recent years by the pedestrianisation of John Street from the southern side of its junction with Lias Road, southwards to the northern side of its junction with Well Street, and for Old School Road from the eastern side of its junction with the road leading from Mary Street car park eastwards to its junction with John Street. Both schemes have greatly reduced the pedestrian/vehicular conflict within the town centre. The above appears to be consistent with the Public Attitude Surveys, with 86.8% of users considering the Town Centre to be very good or good in terms of pedestrian friendliness.

Public Transport:

4.6.2 Regular bus services run to and from nearby principal towns. The two main bus operators providing these services are the First Group (South Wales) and Shamrock(operating as Bridgend Bus Company), with Stagecoach providing the Aberdare service. Outside the County Borough, there is an hourly service from Swansea (Monday to Saturday), a service running every 20 minutes from Cardiff (every 60 minutes on Sunday), and a service from Aberdare running 9 trips Monday to Saturday and 4 trips on a Sunday. The service from Cardiff picks up at several points along the route, including Bridgend, where it connects with services from the Valleys. However, there is a direct service from Bridgend (every 30 minutes) and a service from the Princess of Wales Hospital (every 60 minutes only in evenings).

4.6.3 Shamrock bus group runs all services within Porthcawl. They are responsible for servicing three main routes. These include frequent services running daily to Danygraig, Trecco Bay and Rest Bay. Within the town, bus stopping areas are present in key locations e.g. outside the Somerfield supermarket and along the northern section of John Street.

4.6.4 The services outlined above indicate that access to Porthcawl is well facilitated by the bus sector. However, Porthcawl lacks direct rail links, which may act as a significant drawback for visitors wishing to shop in the town. The nearest principal station to the town is at Bridgend, which is situated on the main Swansea-Paddington line. There also exists the benefit of a bus shuttle link to and from this station. Further, the opening of Pyle Station in May 1995 enabled a more direct rail-road link to Porthcawl. However, the full benefits of this additional service are yet to be experienced due to the absence of a direct bus shuttle link running regular trips to and from Pyle Station.

4.6.5 In future, links to Porthcawl are set to be strengthened by a proposal for a Park and Ride facility to serve the town. Such a measure will aid the diversion of car-borne journeys to Porthcawl onto buses. This will help to improve the shopping environment by reducing congestion within the town centre.

Car Parking:

4.6.6 Table 7 below lists the off-street car parks within Porthcawl.

Car Park	**No. of Spaces**
John Street	80
Hillsboro Place – North & South	340
Somerfield	170
Salt Lake	2000
Sandy Lane	350
Mackworth Road	320
TOTAL	3260

Table 7

4.6.7 Currently, there are 3,260 off-street car park spaces in Porthcawl town centre and an additional 1,800 spaces at the Rest Bay seasonal car park. Of the off-street car parks, John Street, Hillsboro Place and the Somerfield (rooftop) car park serve the shopping centre. The remaining car parks, Salt Lake, Mackworth Road and Sandy Lane are long – stay car parks, which serve the main summer visitors to the town. Hillsboro Place and John Street car parks operate a ‘pay and display’ system. With respect to on-street parking, there is unrestricted parking adjacent to the town centre in Hillsboro Place, James Street, Mary Street, Dock Street, Well Street, the Square and John Street which accounts for a total of approximately 140 spaces. The Esplanade and Eastern Promenade provide around 270 spaces, adjacent to the seafront. These on-street spaces are occupied all year-round.

4.6.8 Porthcawl has experienced the structural changes found in most British seaside resorts. This coupled with the fact that the majority of shopping trips in the centre are for a limited number of purchases, means that easy and accessible parking is fundamental to the future success of the town centre. At present, there is an adequate supply of parking for both shoppers and visitors.

4.6.9 Overall, it can be said that Porthcawl is widely accessible by both public and private modes of transport.

4.7 Customer Views and Behaviour

4.7.1 As mentioned in 4.1.1 above, and has featured throughout this report, the County Borough Council commissioned Research and Marketing Limited to undertake a town centre perception survey in early 2004. This survey consisted of telephone and on-street interviews. Whilst it is not possible to present all of the results in this report, below are selected questions and their respective results:

Main reason for visiting the town centre:

Food and Grocery Shopping: 26.2%; Non-food shopping: 24.9%; Window Shopping: 22.3%; Work / Business: 6.6%.

Where people came from:

Home: 92.8%; Work: 4.3%.

Average journey time to town centre:

18 minutes.

Frequency of visits

Daily: 28.2%; 2-3 times a week: 30.2%; Weekly: 12.8%; Fortnightly: 5.2%; Monthly: 7.9%; Less Often: 14.4%; First visit: 1.3%.

Average spend in town centre

Non-food: £10.88; Food: £10.01.

Average length of time spent in Porthcawl

94 minutes (just over 1 hour 30 minutes).

What people most like about the town centre
Familiarity: 23.3%; Atmosphere: 19.0%; Nothing/Very little: 7.5%; %; Easy to get to by on foot: 6.9%; Easy to get to by car: 5.9%; Attractive environment/nice place: 5.6%; Good food shops: 4.9%; Good non-food shops: 4.6%; All shops in same place: 3.3%.

What people most dislike about the town centre
Nothing/very little: 39.3%; Poor range of non-food shops: 20.7%; Poor range of food stores: 10.2%; Streets dirty / badly maintained: 3.2%.

What improvements to could be made to meet day-to-day needs
None/nothing: 25.6%; More/better non-food shops: 21.0%; More/better food shops: 13.8%; Cleaner Streets: 6.2%; Improve safety & security: 5.9%; Better sports and leisure facilities: 4.9%; Cheaper parking: 3.6%; Trees / flower displays / landscaping: 3.0%; More/better parking: 2.0%.

4.7.2 The primary catchment area of Porthcawl is very localised. The findings suggest that the centre is pre-dominantly used for incidental goods or top-up shopping with a relatively low retail expenditure. The above findings suggest that Porthcawl town centre is rated poorly for those criteria which matter most to shoppers, such as its range of goods and is used more because it is seen as a convenient shopping centre.

4.8 Environmental Quality

76.0% of users consider Porthcawl Town Centre to have a very good or good quality of environment; 12.8% thought it was neither good nor poor; 9.9% considers it to be poor or very poor.

Source: RMLtd Street Survey

4.8.1 The environmental quality of Porthcawl town centre appears to be of a reasonably high standard, especially in the core area in John Street, which has undergone pedestrianisation and public realm improvements. Porthcawl also has an attractive promenade, providing high quality sea views, which attract a high number of visitors, particularly in the summer season and at weekends.

4.8.2 Environmental quality in terms of ‘street-scape’ is especially good in John Street. The street furniture (i.e. benches and monuments) and lighting along John Street sympathetically amalgamate with each other. This amalgamation reflects and blends with the historical connections and maritime feel of the area. Further, there is very little clutter, litter and graffiti in the town centre. However, there is poor provision for greenery within the town centre, especially within the pedestrianised portion of John Street.

Figure 11: View of John Street – Porthcawl

Figure 13:Example of Public Art – Porthcawl)

Credits: BCBC

4.8.3 From the Public Attitude Survey, patrons of Porthcawl town centre seem to be satisfied with the environment, with three quarters of the respondents stating that they liked the atmosphere and the attractive environment that the centre offered.

4.9 Perception of Safety / Occurrence of Crime

79.9% of users of Porthcawl Town Centre said it had a good or very good feeling of safety and security. 20% thought it was neither good nor poor; only 4.9% considered it to be poor or very poor.

Of those who considered it to be poor or very poor:
40.9% said it was due to 'Young people hanging about'
40.9% said it was due to 'evidence of anti-social behaviour'
18.2% said it was due to 'reputation / perception / press reports'

Source: RMLtd Telephone Survey

4.9.1 At present, it is not possible to assess the level of crime in Porthcawl town centre, due to the fact that the Police Authority do not collect information on town centre / car park related crime. However, the public's perception of Porthcawl in terms of safety and security is very encouraging with over three-quarters of respondents rating it good or very good.

4.9.2 Security within the town has recently been increased by the installation of CCTV cameras at key points. A large number of outlets also have their own surveillance systems. It has been mentioned that there is a subway link, which effectively cuts off New Road from the main commercial centre. Further, this subway link lacks security features and could therefore be improved through the provision of better security measures i.e. better lighting and more CCTV cameras. Car Parks within the town also have the potential to be made more 'secure' through improvements in lighting. These areas could benefit from increasing modern, bright vandal proof lights. This would also contribute to improving the town's image.

4.10 CONCLUSION

4.10.1 From the indicators listed above, the town centre's performance can be summarised as follows:

- Porthcawl town centre has experienced a small increase in prime retail rents over the last year. Figures for secondary retail rents were unavailable at the time of the study.
- Office rents in Porthcawl are also higher than those in other comparable centres within the County Borough i.e. Maesteg.
- Over the last 12 months there has been a decrease in the number of service sector outlets, however the Service Sector still dominates the Town Centre in 2003.
- The vacancy rate in Porthcawl is 5.28%, which is well below the national average of 10.48%.
- The majority of premises in Porthcawl town centre (48.68%) have a floorspace area of less than 1,000 sq. ft.
- There is limited multiple retail offer within Porthcawl. The shape and size of existing units impose restrictions on large multiple retailers locating in the town.
- The town is widely accessible by all forms of transport, however there is a deficiency in the rail mode.
- There is generally good car-parking provision for shoppers within the town.
- The environmental quality of the town has been enhanced in recent years from public sector investment i.e. through pedestrianisation and the provision of street furniture.

4.10.2 The town centre perception survey has also given a strong indication of the town's vitality and viability by analysing shopper behaviour and attitudes. The users of the town centre seem extremely satisfied with the environment, with three-quarters of respondents stating that they liked the atmosphere and that Porthcawl has an attractive environment and is a nice place.

4.10.3 Notwithstanding the above, the range of food and non-food shops seemed to be a large factor in what patrons dislike about the centre. In accordance with the ratings given for the range and choice of food and non-food shops respondents of both the on-street and telephone survey stated that an improvement with regard to these factors would encourage them to visit Porthcawl more often. This enforces the need to attract a major anchor store to Porthcawl, which in turn would attract shoppers and anchor the town centre as a whole.

4.7.1 4.10.4 In conclusion it is essential that the Health Check process for Porthcawl be repeated on an annual basis, so that the vitality and viability of the town can be measured. Regular monitoring of the town centre's 'health' will allow an assessment of future direction of trends already perceived and enable planning policies to be tailored to ensure that the regeneration of the area is a success.

MAESTEG TOWN CENTRE HEALTH CHECK 2003

5.1 Introduction

5.1.1 The 2002 Town Centre Health Check for Maesteg was the first health check to be carried out on the town by the County Borough Council. The comparative basis in that study was therefore limited due to it being the base-line study. In the 2003 study, the scope for comparison and measurement of change in the overall health of the town is therefore much wider.

5.1.2 Maesteg is the main shopping centre in the Llynfi Valley located in the northern part of the County Borough. It is located about 9.3 miles to the north of Bridgend town and is approximately 7.8 miles from junction 36 of the M4. There is a railway station with direct trains to Cardiff and connections to the main Swansea – London line at Bridgend.

5.1.3 In terms of character the town can best be described as an Edwardian Industrial Town. The commercial core is compact and is centred around Talbot Street and the area to the north, Commercial Street and Bethania Street. Most of the buildings are terraced rows of shops with both residential accommodation and office uses on two or three storeys above.

5.1.4 Overall Maesteg is a relatively small town located in an area which has suffered from industrial decline and population loss. However it still remains an important source of economic and cultural activity.

5.1.5 It is recognised that for small towns, there is a general scarcity of readily available data and information, particularly in terms of property development. Vitality and viability data such as rental values and capital yield are normally more widely available for larger centres where many more transactions take place. It is therefore not possible to produce an analysis as comprehensive as in the case of a medium to large size town such as Bridgend or Cardiff.

5.1.6 In early 2004, Bridgend County Borough Council commissioned Research and Marketing Limited to undertake a household and street survey regarding people's perception of Maesteg Town Centre (as well as Bridgend and Porthcawl centres). The results of this survey will be highlighted in this report.

5.1.7 The 2002 Maesteg health check concluded that the town has a reasonably good mix of convenience / comparison and service sector uses. However, vacancy rates were above the national average, with much of the vacant floorspace being concentrated in the secondary frontage of Commercial Street. The environmental quality was seen as being 'generally fairly good', however, it was concluded that the enhancement of the physical environment of the town centre should be a priority and would be the key to increasing the attractiveness of the centre. It was pointed out that financial assistance to property owners through various grant schemes and public sector investment in the public realm were likely to bring improvements to the built environment.

5.2 PROPERTY MARKET INDICATORS:

5.2.1 Knowledge of retail rental values when compared over time and with other centres provide an indication of the demand for retail space by retailers competing to establish themselves in a centre.

5.2.2 Zone A prime rents for Maesteg compared to other centres in 2002 and 2003 are shown in table 8 below:

	£ sq ft (2002)	£ sq ft (2003)	Change (%)
Maesteg	23	25	8.7%
Bridgend	60	60	0%
Porthcawl	27	28	3.7%
Neath	70	70	0%
Port Talbot	45	45	0%
Pontypridd	50	55	10%
Merthyr Tydfil	60	65	8.3%
Cardiff	240	250	4.2%
Swansea	155	155	0%

Table 8 Primary Retail Rents

Source: Colliers CRE & Cooke & Arkwright

5.2.3 The table clearly shows where Maesteg stands in comparison with other centres. The most recent figures for 2003 suggest that the average prime retail value for Maesteg stand at £25 per sq. ft. This figure is much lower than in other centres. This indicates a situation of weak demand for retail space by retailers and investors. This reflects Maesteg's lower role in the retail hierarchy compared to other bigger centres such as Bridgend or the super prime centres such as Cardiff and Swansea. It also underlines Maesteg's smaller catchment area.

5.2.4 However, despite the existence of low prime retail rents in Maesteg, over the past year, they have increased by 8.7%. This is a positive increase, especially when compared to other comparable centres such as Porthcawl which seen an increase of only 3.7% over the same period.

5.2.5 Maesteg functions as an important town centre providing a range of residential, retail, service and community facilities, serving the Llynfi Valley and surrounding area. It however, does not attract retailers in the growing areas of young fashion, multi-media and lifestyle comparison products. These types of retailers normally seek town centres where catchment populations are large. This has the effect of depressing rental values and highlights Maesteg's subordinate role as a comparison goods centre.

5.2.6 There is a lack of information for Maesteg to enable an assessment of investor confidence in the area. It is not one of the centres included by Experian Goads Retail Centre Ranking which assesses the vitality and attractiveness of a centre by combining factors of the retail criteria type.

5.2.7 In terms of Maesteg office rents there is limited information available to enable comparisons to be made from last year's figures. The Council have contacted national and local letting agents to ascertain their views, however, lack of evidence over the past 12 months means that the most up-to-date available figure are those for 2002, which stand at £5 per sq. ft. (secondary) and £8 per sq. ft. (Prime).

5.3 DIVERSITY OF USES:

How do you rate: Range and Choice of Services?
56.6%: good or very good; 17.4%: neither good nor poor; 23.7%: poor or very poor.
Range and Choice of non-food Shops?
28%: good or very good; 21.1%: neither good nor poor; 49.3%: poor or very poor.
Range and Choice of Food Shops?
40.8%: good or very good; 23.7%: neither good nor poor; 34.9% poor or very poor
Source: RMLtd Telephone Survey

5.3.1 The information in table 9 below compares the retail land use surveys of the Maesteg commercial area undertaken in 2002 and 2003.

	No. of Units (2002)	No. of Units (2003)	% (2002)	% (2003)	GB Average %
Convenience	10	10	6.06	6.06	9.30
Comparison	59	56	35.76	33.94	48.12
Services	55	63	33.33	38.18	30.61
Vacant	24	20	14.54	12.12	10.48

Table 9 Diversity of Uses

Sources: Bridgend County Borough Council and Goad Town Centre Reports

5.3.2 Table 16 indicates that in 2003, service goods accounted for the highest number of outlets within Maesteg Town Centre, whereas comparison goods outlets were the more dominant in 2002. It can be seen that the number of service outlets has increased over the past year from 33% to 38% of all properties within the commercial area. There has therefore been a slight decline in comparison goods in favour of the service sector and is a trend associated with most British towns and cities. This exemplifies Maesteg's relative attraction in meeting food and drink demand, where the uses are concentrated in the secondary frontages of Commercial Street. This may also be a strong indication of demand for professional and financial services which is drawn from a wider catchment area.

5.3.3 The stock of convenience goods outlets within Maesteg has remained static at 6% between 2002 to 2003. Compared to the national average, Maesteg town centre has fewer convenience goods outlets than could reasonably be expected. The convenience goods sector does, however satisfy a main shopping need particularly in the food sector where there are a number of supermarkets including Somerfield, Aldi and Iceland.

The fortunes of the town centre are however to a large extent dependent upon the survival of independent retailers.

5.3.4 From 2002 to 2003 the number of vacant properties in Maesteg has decreased from 24 to 20 units. This is a positive trend as vacancy levels are an important indicator of vitality and viability. However, care should be taken when interpreting vacancy rates as vacancies can occur in the strongest towns. Although vacancy rates have decreased to 12% over the past year, it should be noted that they are still higher than the national average of 10.48%. Much of the vacant floorspace is located in the secondary frontage of Commercial Street where there are several properties in poor physical condition.

5.3.5 In addition to comparison, convenience and service uses there are also many uses of a non-retail nature and include commercial office, residential uses, and civic and cultural buildings, which add to and enhance the vitality and viability of the town.

	Floorspace Sq Ft (2002)	Floorspace Sq Ft (2003)	% (2002)	% (2003)	National Average (%)
Convenience	34,100	24,832	13.25	9.75	16.70
Comparison	91,149	87,363	35.41	34.23	57.96
Services	85,885	91,386	33.36	35.87	20.54
Total	**211.134**	**203.581**			

Table 10 Diversity of Uses (floorspace)

Sources: Bridgend County Borough Retail Survey and Goad Town Centre Reports

5.3.6 It is estimated that convenience / comparison / services outlets account for a total of 129 properties and cover an area of approximately 203.581 sq. ft. This is considerably smaller than Bridgend which has a total floorspace area of approximately 600,000 sq. ft. Table 10 highlights that in the past year there has been a reduction in the amount of floorspace occupied by convenience sector outlets, despite the number of these outlets remaining static over this period. This can be explained by the town centre loosing its Somerfield store on Llynfi Road and the opening of Bargain Booze on Talbot Street. This effectively left a reduction in the convenience floorspace due to the size of the former being much greater than the latter.

5.3.7 Maesteg has experienced a slight decrease in comparison floorspace from 2002 to 2003. More significantly however, the proportion of comparison floorspace in Maesteg is over 23% lower than the national average. This clearly shows an under-representation of comparison shopping, particularly of the footwear and fashion type. This also reveals that Maesteg is not a main centre for comparison shopping. It lacks a large department or variety store to secure its appeal. There is also an apparent absence of other key attractors and large multiple retailers. This absence clearly reduces Maesteg's attraction and its ability to retain expenditure and expand its catchment area.

5.3.8 Table 10 also illustrates that from 2002 to 2003 there was an increase in the proportion of service goods floorspace from 33% to almost 36%. This figure is significantly higher than the national average of 20%. This trend is inherently linked to the overall growth in the total number of service goods outlets over this period.

5.3.9 Table 11 below illustrates the distribution of outlets by size within Maesteg Town Centre:

Under 1,000 sq. ft.	78	47.27%
Between 1,000 and 2,499 sq. ft.	62	37.58%
Between 2,500 and 4,999 sq. ft.	19	11.52%
Between 5, 000 and 9,999 sq. ft.	3	1.82%
Between 10, 000 and 14,999 sq. ft.	2	1.21%
Between 15,000 and 19,999 sq. ft.	1	0.61%
Between 20,000 and 29,999 sq. ft.	0	0.00%
30,000 sq. ft. and above	0	0.00%
Total	**165**	**100.00%**

Table 11 Outlet Size Distribution

Source: Bridgend BCBC

5.3.10 Almost half of all properties surveyed in 2003 are below 1,000 sq. ft. This suggests that Maesteg like Porthcawl does well in encouraging small independent retailers serving local needs. However this does not provide the flexibility for major retailers who require large stores. The shape and size of units located on Talbot Street and Commercial Street impose restrictions when catering for the larger store formats. As in most town centres, this situation has the potential to change with any re-development / extension of the town centre giving the possibility of combining several outlets to form larger single units.

Maesteg Market:

5.3.11 The market plays an important role in the life of the town and in the diversification of the retail facilities on offer. As with the health check for Bridgend, for the first time in 2003, the composition of the Town's Market was also surveyed. The results of the survey for Maesteg Market are shown overpage. These figures have been compiled from stalls located both within the indoor and outdoor market.

5.3.12 Table 12 (below) shows the contribution which the market stalls make to the service, convenience and comparison goods offer of the town centre. The market provides for 9 additional convenience units, 14 comparison units and 2 service units which have not been accounted for in either the County Borough's Annual Retail Survey nor through commercially provided data. This data shall be collected in the forthcoming health checks for Maesteg, so that the health of Maesteg Market can also be assessed in relation to the town centre.

MAESTEG MARKET	No. of Units
Convenience	
Bakers and Confectioners	3
Butchers, Poulterers and Fishmongers	4
Grocery	1
Off Licences/Confectioners/Tobacconists/Newsagents	1
Total	**9**
Comparison	
Women's, Girls, Children and general wear	1
Booksellers, arts, crafts, stationers, copy bureaux	3
Electrical, gas, music & photography	1
Florists, nurserymen and Seedsmen	2
DIY, hardware & housewares	1
Jewellers and Repair	2
Toy, hobby, cycle and sport	1
Furniture, carpets & textiles	1
Variety	2
Total	**14**
Service	
Restaurants, coffee bars, fast food and takeaways	1
Hairdressers, Beauty Parlours and Health centres	1
Total	**2**

Table 12 Retail Provision in Maesteg Market

5.4 RETAILER REPRESENTATION:

5.4.1 Maesteg has a range of national multiples represented within the town centre and include the following: -

Comparison Goods:	**Convenience Goods:**
Woolworths	Somerfield
Shoefayre	Aldi
Argos	Iceland
New Look	Greggs
Blockbuster	Spar
Seconds Ahead	

5.4.2 New Look is a recognised key attractor in Goad town centre reports. In terms of convenience goods Maesteg contains a Somerfield store. However, the town lost its second Somerfield store located just off Llynfi Road earlier this year, as a result of fire damage. This vacant site offers the potential of a commercial opportunity, particularly to a multiple retailer due to the size of the property. Maesteg contains 3 bakers, 3 grocers and 2 butchers. In terms of comparison multiple retailers, Maesteg unfortunately lost its Boots store earlier this year.

5.4.3 Maesteg has a good selection and range of service outlets, particularly in the financial and banking sectors. The following national service providers are represented : -

HSBC
Lloyds TSB
National Westminster Bank
Lunn Polly
Principality

5.4.4 It was mentioned in paragraph 5.3.11 that the market with its stalls play an important role in the life of the town, and in the diversification of the retail facilities on offer. Overall, Maesteg offers a relatively diverse range of uses. In addition to shopping, the town centre caters for pubs, cafes and household services as well as a library.

5.4.5 However, the list of multiple retailers in Maesteg is rather limited and serves only local needs of the incidental food and non-food shopper. The town lacks a major store to attract shoppers and to anchor the town centre as a whole. However, it seems as if this situation is likely to change in light of the Inspector of the Bridgend UDP inquiry recommending that the land adjacent to Maesteg RFC ground should remain allocated as a key retail development site. The site also has the benefit of outline planning permission for a foodstore. The attraction of a major supermarket multiple at this location would act as a key attractor within the town and significantly add to the centre's vitality and viability.

5.5 ACCESSIBILITY

47.0% of Maesteg Town Centre arrive by car as driver; 13.8% as passenger; 16.1% by bus; 19.1% walk; 0.7% by train; and 3.0% by taxi.

60.2% of users considered Maesteg Town Centre to have good or very good access by public transport; 9.5% thought it was neither good nor poor; 13.2% thought it was poor or very poor; 17.1% didn't know.

75% of users consider that car parking facilities within the Town Centre are good or very good; 10.5% thought they were neither good nor poor; 7.6% thought they were poor or very poor; 6.9% didn't know.

53.3% of users thought that the Town Centre was very good or good in terms of pedestrian friendliness; 18.4% considered it to be neither good nor poor; 20.4% thought it was poor or very poor; whilst 7.9% didn't know.

Source: RMLtd Telephone Survey

5.5.1 Both the bus and railway stations are located within the commercial area. The principal bus routes from Maesteg include a quarter hourly service to Bridgend, an hourly service to Swansea, and approximately a quarter hourly service to Cymmer.

5.5.2 In terms of road transport , the principal road accesses to the centre are the A4063 and the B4282. The A4063 provides access north to Caerau and south to Bridgend and the M4 motorway. The B4282 provides access westwards to Port Talbot. At present there is little access provision for cyclists and pedestrians. There are however many residential properties within and adjoining the commercial area, and consequently there is an extensive catchment area within walking distance. There is ample, but time limited on-street car parking within the centre, such as on Commercial Street. The multi-storey car park located on Llynfi Road provides for 340 free car-parking spaces which serve the town centre. The Council has recently spent significant amounts of money on improving this car park. These have included:

painting, new lighting, new surfaces and the installation of CCTV cameras to increase safety.

5.5.3 The town is an important transport link which caters for both the town and the surrounding hinterland. However there is a certain degree of congestion in and around the shopping core area which adversely affects the physical environment. There is little segregation of pedestrian and vehicular traffic which devalues the shopping experience. There is little integration between the rail and bus stations. This does not help in interchanging between the 2 modes.

5.6 PEDESTRIAN FLOWS

5.6.1 There have been no detailed recent pedestrian flow count surveys undertaken for Maesteg. However, RMLtd are being commissioned to undertake one in 2004. The results of which will be reported in the 2004 town centre health check for Maesteg. Observations indicate a relatively strong pedestrian flow within the retail core. Talbot Street is where the multiples are located, and can clearly be identified as the hot-spot within the centre where activity is at its highest. Although Commercial Street is the main retail street, activity is somewhat less. The Aldi/Argos/Iceland developments have considerably enhanced the pedestrian flow within the town centre and have proved to be an asset in increasing the attractiveness of the town. They have also become an important local alternative.

5.7 ENVIRONMENTAL QUALITY

37.9% of users consider Maesteg Town Centre to have a very good or good quality of environment; 28.6% thought it was neither good nor poor; 32.5% considers it to be poor or very poor. Source: RMLtd Telephone Survey

5.7.1 The overall quality of the environment is generally good. However too much floor space is given over to vehicles at the expense of pedestrians. Vehicular/pedestrian conflict detracts from the visual and environmental aspect of the area.

5.7.2 Within the commercial core economic decline has led to a spiral of reduced expenditure in the repair and maintenance of building fabrics. This in turn has led to deterioration in the built environment and an untidy visual appearance. This is most apparent in the rear elevations

Figures 12 & 13: Maesteg indoor market Traditional shopfronts on Commercial Street

of the buildings. Maesteg is currently in the early stages of a regeneration programme designed to enhance its physical appearance and townscape. The County Borough Council is assisting in the accessing and management of grant schemes aimed at environmental improvements such as Town Improvement Grants, Commercial Improvement Area scheme, and Townscape Heritage Initiative funded by the Heritage Lottery Fund. The Townscape Heritage Initiative has been encouraging property owners in Maesteg to apply for grants to improve the external appearance of their buildings and shopfronts, in order to make shopping more accessible and pleasant for residents and visitors. In addition, the establishment of The Maesteg Conservation Area will result in greater control over the design of buildings and public realm improvements.

5.7.3 The first phase of the town centre's regeneration is scheduled to commence in summer 2004. Projects planned for the commercial area include: widening pavements for pedestrian comfort and safety, the planting of trees along both sides of Commercial street, the framing of historic buildings, the introduction of furnished pedestrian areas with improved signage, lighting as well as improving access for buses and cyclists. Bicycle racks will be installed to encourage more cycle users into the town. Clearly defined parking bays will also be introduced to combat the existing problems of illegal parking within the town.

5.7.4 A new paving surface, coated with practical chewing-gum resistant substance is to be installed, together with 'vandal-resistant' benches which have been specially designed to deter skaters from using them. All new street furniture, materials and lighting has been selected to complement the townscape of Maesteg and improve the image of the town. A special key feature of the new paving is the insertion of bronze discs at key locations designed and moulded by young people in Maesteg.

5.7.5 As part of the regeneration programme, a series of banners and posters have been designed by pupils at Maesteg Comprehensive School. A logo has been chosen which depicts an image of the Maesteg Town Hall, incorporating a green swirl to represent the 'Greening of Maesteg'. The logo includes the strap-line 'Maesteg Matters' emphasising the pride of place which the regeneration programme is intending to promote. The banners will be erected on street lighting columns in order to help mark visitors arrival into the town centre.

5.8 CUSTOMER VIEWS AND BEHAVIOUR:

5.8.1 As it was mentioned in the Introduction to this health check, the County Borough Council commissioned Research and Marketing Limited to undertake a town centre perception survey in early 2004. This consisted of telephone and on-street interviews. Whilst it is not possible to present all of the results in this report, below are selected questions and respective of their results:

Main reason for visiting the town centre

Non-food shopping: 16%; food and grocery shopping: 34.3%; work / business 10.5%; financial services 11.8%; browsing / window shopping: 10.8%;

Where people came from

Home: 94.4%; Work 4.9%

Average journey time

12 minutes

Frequency of visits

Daily: 38.9%; 2 – 3 times a week: 40.2%; Weekly: 12.4%; Fortnightly: 1.3%; Monthly: 2.9%; Less often: 3.6%.

Average spend in town centre

Non-food gods: £13.32; Food goods: £13.68.

Average length of time spent in Maesteg

70.02 minutes (just over 1hour 10 minutes).

What people most like about the Town Centre

Nothing / very little: 17.3%; Familiarity: 27.8%; Good non-food shops: 3.3%; All shops in same place: 2%; Easy to get to on foot: 7.2%; Easy to get to by car: 7.5%; Good food shops: 6.2%; Good range of services: 1.0%; Atmosphere: 8.5%.

What people most dislike about the town centre

Nothing / very little: 24.5%; Poor range of non-food shops: 31.4%; Difficult to park: 1.3%; Poor range of food stores: 6.9%; Traffic: 4.6%; Poor / unattractive environment: 4.9%; Cost of car parking: 0.7%; Poor choice of places to eat / drink: 2.3%; Streets dirty / badly maintained: 8.2%.

What improvements to Maesteg could be made to meet day-to-day needs

More / better non-food shops: 32%; Nothing: 23.3%; More / better food shops: 10.8%; More / better car parking: 2%; More / better seating: 0.7%; Cheaper Parking: 0.7%; Cleaner Streets: 12.1%; Better public transport: 1%; Trees / flower displays / landscaping: 0.7%; More pedestrian friendly shopping areas: 3.6%.

5.9 PERCEPTION OF SAFETY / OCCURRENCE OF CRIME

62.5% of users of Maesteg Town Centre said it has a good or very good feeling of safety and security; 19.4% thought it was neither good nor poor; 15.8% considered it to be poor or very poor. Of those who considered it to be poor or very poor: 45.8% said it was due to “young people hanging about” 35.4% said it was due to “evidence of anti-social behaviour” 14.6% said it was due to “reputation/perception/press reports

5.9.1 At present, it is not possible to assess the level of crime in Maesteg Town Centre, as the Police do not collect information on town centre / car park related crime.

5.9.2 The Town Centre has for a number of years, benefited from the installation of CCTV cameras at key points which has greatly improved security within the town. As it was mentioned above, additional CCTV cameras are being installed at the Town’s multi-storey car park. This will help to increase safety and reduce car park related crime even further within the town. In addition, there are plans to review CCTV coverage within the town, with the possibility of increasing their number and making changes to their positioning.

5.9.3 Furthermore, plans to improve lighting within the town will also help to improve the perception of safety within the town. The installation of modern, bright vandal proof lights will contribute to improving the town’s image.

5.10.1 CONCLUSIONS:

5.10.2 From the indicators listed above, the town centre’s performance can be summarised as follows:

- Maesteg has experienced a positive increase in prime retail rents of 8.7% over the past year. Figures for secondary retail rents were unavailable at the time of the study.
- Over the past year, there has been an increase in service sector outlets (from 33% - 38%) and a slight decrease in comparison goods outlets (from 35% - 33%), whilst convenience goods outlets have remained static over this period.
- From 2002 to 2003, vacancy rates have decreased from 14.54% to 12.12%. However, this figure is still above the national average of 10.48%.
- The majority of premises in Maesteg town centre (47.27%) have a floorspace area of less than 1,000 sq. ft.
- There is a rather limited multiple retail offer within Maesteg. The shape and size of existing units impose restrictions on large multiples from locating in the town. A ‘poor range of non-food shops’ was cited as the most common reason (31% of shoppers) for disliking the town centre. Only 16% of shoppers stated that ‘non-food shopping’ was their main reason for visiting the town centre. 32% of shoppers believed that more/better non-food

shops were improvements, which could improve Maesteg to meet day-to-day needs.

- The town is widely accessible by all forms of transport – 60.2% of users considered Maesteg to have good or very good access by public transport.
- The town has good car-parking facilities with 75% of users considering that car-parking facilities are either good or very good.
- The environmental quality of the town is in need of enhancement with only 37.9% of users considering that it has either a good or very good quality of environment.
- Over 62% of users consider the town centre to have either a good or very good feeling of safety and security.

5.10.3 The assessment of Maesteg Town Centre for 2003 has illustrated some evident signs of increased levels of vitality and viability from 2002. This is reflected in increases in prime retail rents and decreases in vacancy levels. Notwithstanding this however, retail rents in Maesteg are considerably lower than other comparable centres in South Wales. The health check has also illustrated how the customer surveys revealed public satisfaction as well as dissatisfaction with certain elements of the town centre.

5.10.4 Overall, Maesteg Town Centre fulfils an important local role as a top-up shopping centre. It also has a localised role as a centre for the provision of a range of services and non-food shopping needs. However, the town is somewhat deficient in the latter as illustrated in the results of the 'on-street' surveys. The likely attraction of a new supermarket on the rugby ground site will significantly add to the centre's vitality and viability and thus act as an 'anchor store' and as a key attractor within the town. However this will not provide for an anchor in the same way as a 'Marks & Spencer' or a 'Debenhams' would do so for example. Such a type of development would go a long way to resolve the deficiency in non-food shopping provision in Maesteg.

5.10.5 The environmental quality of the town is set to be enhanced by a series of phases of town centre regeneration. The first of which is scheduled to commence in summer 2004. Public sector investment in the public realm and the increased availability of financial assistance to property owners through various grant schemes will be key tools in enhancing the physical environment and increasing the overall attractiveness of the town. In light of the fact that the customer surveys revealed a low level of satisfaction with the environmental quality of the town, then it must be concluded once again, that enhancements in the physical environment should be a key priority.

6.1 INTRODUCTION

6.1.1 As outlined in section 1, for the second time, the Council has undertaken its own survey into the uses of all of the smaller Established Commercial Centres within the County Borough.

6.1.2 As with the Town Centre Health Checks, *Technical Advice Note (Wales) Number 4: Retailing and Town Centres* (1996) states that area wide information which could be useful to Local Planning Authorities is:

"*…the amount and distribution of different forms of retailing across a local authority area can provide a useful profile of the industry and assist in identifying the shopping hierarchy. Usually expressed as total gross floorspace, the main types of retailing identified are: convenience (mainly food) and comparison or durable goods (clothes, DIY, electrical components. etc). Outstanding planning permissions and known commitments should also be monitored.*"

6.1.3 The retail hierarchy of the County Borough is defined by Policy R2 of the adopted Ogwr Borough Local Plan as follows:

Sub Regional Centre:	Bridgend
Town Centres:	Maesteg, Porthcawl
Neighbourhood Centres:	Aberkenfig, Caerau, Kenfig Hill / Pyle, Pencoed, Pontycymmer
Community Shopping Centres:	Blaengarw, Brackla, Nantyffyllon, Nantymoel, Ogmore Vale.

Whilst this is hierarchy is consolidated (by defining both neighbourhood and community centres as district centres) in the emerging Bridgend Unitary Development Plan, the existing retail hierarchy gives a good indication as to the level of services that one could expect to be offered in each of the centres.

6.1.4 This survey was conducted in December 2003 and, whilst all floors of properties were surveyed, in line with other commercially provided data, <u>all figures relate to ground floor uses only</u>. In addition to this data, also included in this section are GIS based maps similar to those available commercially, but produced by the Local Planning Authority. These give an effective visual presentation of the vitality and viability of the centres by immediately highlighting areas which are rich in commercial activity and those which are not with high levels of vacancies or non-retail uses.

BRIDGEND TOWN CENTRE - 2003	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	467	882,221
Total Service / Convenience / Comparison / Vacant	374	742,581
Total Other	93	139,640
Total Vacant	53	82,365
% Vacant	11.35%	9.34%
Total Convenience	13	39,417
% Convenience	2.78%	4.47%
Total Comparison	148	318,838
% Comparison	31.69%	36.14%
Total Service	160	301,960
% Service	34.26%	34.23%
Convenience Goods		
Bakers & Confectioners	5	4,746
Butchers & Poulterers	1	463
Grocery	5	32,766
Off licences / Confectioners / Tobacconists / Newsagents	2	1,442
Total	**13**	**39,417**
Comparison Goods		
Footwear and Repair	6	8,676
Mens and Boys Wear	4	5,210
Womens, Girls, Children and General Wear	27	67,694
Furniture, carpets & textiles	13	20,990
Booksellers, arts, crafts, stationers, copy bureaux	10	15,145
Electrical, gas, music & photographic	21	25,930
DIY, hardware & housewares	5	5,845
China, glass, fancy & leather goods	8	5,027
Cars, motorcycles & motor accessories	1	1,615
Chemists, drug stores & opticians	13	27,319
Variety, department & catalogue	7	69,847
Florists, nurserymen & seedsmen	2	2,454
Toys, hobby, cycle & sports	9	13,347
Jewellers & repair	8	6,168
Other	14	43,572
Total	**148**	**318,838**
Service		
Restaurants, coffee bars, fast food & takeaways	38	48,728
Pub / Club	19	65,229
Hairdressers, beauty parlours & health centres	21	13,627
Laundries and Dry Cleaners	1	818
Travel Agents	7	8,364
Banks, Building Societies and Financial Services	26	43,518
Estate Agents and Valuers	12	16,038
Professional Services	18	21,087
Other	18	84,551
Total	**160**	**301,960**
Distribution of Outlets by Size		
Under 1,000 sq ft.	222	47.54%
Between 1,000 and 2,499 sq. ft.	161	34.48%
Between 2,500 and 4,999 sq. ft.	49	10.49%
Between 5,000 and 9,999 sq. ft.	22	4.71%
Between 10,000 and 14,999 sq. ft.	9	1.93%
Between 15,000 and 19,999 sq. ft.	3	0.64%
Between 20,000 and 29,999 sq ft.	1	0.21%
30,000 sq. ft. and above	0	0.00%
Total	**467**	**100.00%**

PORTHCAWL TOWN CENTRE - 2003	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	265	402,732
Total Service / Convenience / Comparison / Vacant	188	302,574
Total Other	77	100,158
Total Vacant	14	25,769
% Vacant	5.28%	6.40%
Total Convenience	13	37,318
% Convenience	4.91%	9.27%
Total Comparison	74	101,041
% Comparison	27.92%	25.09%
Total Service	87	138,445
% Service	32.83%	34.38%
Convenience Goods		
Bakers & Confectioners	3	3,122
Butchers & Poulterers	2	3,003
Grocery	5	27,394
Off licences / Confectioners / Tobacconists / Newsagents	3	3,800
Total	**13**	**37,318**
Comparison Goods		
Footwear and Repair	4	5,630
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	14	21,323
Furniture, carpets & textiles	8	11,098
Booksellers, arts, crafts, stationers, copy bureaux	8	7,481
Electrical, gas, music & photographic	8	6,222
DIY, hardware & housewares	2	2,669
China, glass, fancy & leather goods	1	280
Cars, motorcycles & motor accessories	1	2,530
Chemists, drug stores & opticians	7	11,819
Variety, department & catalogue	4	13,509
Florists, nurserymen & seedsmen	0	0
Toys, hobby, cycle & sports	4	3,305
Jewellers & repair	4	5,145
Other	9	10,032
Total	**74**	**101,041**
Service		
Restaurants, coffee bars, fast food & takeaways	20	28,137
Pub / Club	7	17,373
Hairdressers, beauty parlours & health centres	7	4,650
Laundries and Dry Cleaners	2	1,970
Travel Agents	4	5,371
Banks, Building Societies and Financial Services	7	10,721
Estate Agents and Valuers	6	4,693
Professional Services	8	7,965
Other	26	57,565
Total	**87**	**138,445**
Distribution of Outlets by Size		
Under 1,000 sq ft.	129	48.68%
Between 1,000 and 2,499 sq. ft.	106	40.00%
Between 2,500 and 4,999 sq. ft.	20	7.55%
Between 5,000 and 9,999 sq. ft.	8	3.02%
Between 10,000 and 14,999 sq. ft.	1	0.38%
Between 15,000 and 19,999 sq. ft.	0	0.00%
Between 20,000 and 29,999 sq ft.	1	0.38%
30,000 sq. ft. and above	0	0.00%
Total	**265**	**100.00%**

MAESTEG TOWN CENTRE - 2003	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	165	254,782
Total Service / Convenience / Comparison / Vacant	149	232,124
Total Other	16	22,658
Total Vacant	20	28,976
% Vacant	12.12%	11.37%
Total Convenience	10	24,832
% Convenience	6.06%	9.75%
Total Comparison	56	86,929
% Comparison	33.94%	34.12%
Total Service	63	91,386
% Service	38.18%	35.87%
Convenience Goods		
Bakers & Confectioners	3	2,874
Butchers & Poulterers	2	1,335
Grocery	3	19,224
Off licences / Confectioners / Tobacconists / Newsagents	2	1,399
Total	**10**	**24,832**
Comparison Goods		
Footwear and Repair	5	5,328
Mens and Boys Wear	1	1,798
Womens, Girls, Children and General Wear	10	13,110
Furniture, carpets & textiles	4	5,576
Booksellers, arts, crafts, stationers, copy bureaux	2	2,056
Electrical, gas, music & photographic	5	3,746
DIY, hardware & housewares	3	3,595
China, glass, fancy & leather goods	2	5,027
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	8	8,557
Variety, department & catalogue	4	22,314
Florists, nurserymen & seedsmen	2	1,270
Toys, hobby, cycle & sports	4	4,445
Jewellers & repair	1	434
Other	5	10,107
Total	**56**	**87,363**
Service		
Restaurants, coffee bars, fast food & takeaways	16	17,545
Pub / Club	9	23,788
Hairdressers, beauty parlours & health centres	7	4,036
Laundries and Dry Cleaners	1	3,660
Travel Agents	3	2,691
Banks, Building Societies and Financial Services	8	14,445
Estate Agents and Valuers	4	3,746
Professional Services	5	3,993
Other	10	17,481
Total	**63**	**56,489**
Distribution of Outlets by Size		
Under 1,000 sq ft.	78	47.27%
Between 1,000 and 2,499 sq. ft.	62	37.58%
Between 2,500 and 4,999 sq. ft.	19	11.52%
Between 5,000 and 9,999 sq. ft.	3	1.82%
Between 10,000 and 14,999 sq. ft.	2	1.21%
Between 15,000 and 19,999 sq. ft.	1	0.61%
Between 20,000 and 29,999 sq ft.	0	0.00%
30,000 sq. ft. and above	0	0.00%
Total	**165**	**100.00%**

ABERKENFIG - 2003	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	86	103,549
Total Service / Convenience / Comparison / Vacant	44	67,393
Total Other (includes Residential Properties & Community Facilities etc.)	42	36,156
Total Vacant	0	0
% Vacant	0.00%	0.00%
Total Convenience	5	6,168
% Convenience	5.81%	5.96%
Total Comparison	18	23,584
% Comparison	22.93%	22.78%
Total Service	21	37,641
% Service	24.42%	36.35%
Convenience Goods		
Bakers & Confectioners	0	0
Butchers & Poulterers	1	1,464
Grocery	3	3,832
Off licences / Confectioners / Tobacconists / Newsagents	1	872
Total	**5**	**6,168**
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	2	1,421
Furniture, carpets & textiles	6	8,471
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	2	1,981
DIY, hardware & housewares	1	1,776
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	1	1,970
Variety, department & catalogue	0	0
Florists, nurserymen & seedsmen	1	377
Toys, hobby, cycle & sports	4	5,889
Jewellers & repair	0	0
Other	1	1,690
Total	**18**	**23,584**
Service		
Restaurants, coffee bars, fast food & takeaways	7	15,446
Pub / Club	5	13,315
Hairdressers, beauty parlours & health centres	3	2,971
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	2	2,293
Estate Agents and Valuers	0	0
Professional Services	1	75
Other	3	3,541
Total	**21**	**37,641**
Distribution of Outlets by Size		
Under 1,000 sq ft.	49	56.98%
Between 1,000 and 2,499 sq. ft.	31	36.05%
Between 2,500 and 4,999 sq. ft.	4	4.65%
Between 5,000 and 9,999 sq. ft.	2	2.33%
Between 10,000 and 14,999 sq. ft.	0	0.00%
Between 15,000 and 19,999 sq. ft.	0	0.00%
Between 20,000 and 29,999 sq ft.	0	0.00%
30,000 sq. ft. and above	0	0.00%
Total	**86**	**100.00%**

6.2 ABERKENFIG

6.2.1 The Established Commercial Centre (ECC) of Aberkenfig is located within the Mid Ogwr Policy area of the adopted Ogwr Borough Local Plan (1995). The centre occupies a central location within the County Borough just south of Tondu and north of the M4. It is located within close proximity of and has a good link road to, Junction 36 at Sarn.

6.2.2 The designated ECC boundary of Aberkenfig is mostly confined to properties fronting Bridgend Road, however the library on Heol – y – Llyfrall and the Police Station on Pandy Road and other premises also lie within the boundary.

6.2.3 The results of the 2003 ECC survey for Aberkenfig illustrate that over the past year, there has been little change in the diversity of the centre's retail offer. Since 2002 there has been an increase in the number of service outlets from 19 to 21 units (24.42% of all properties), whilst the number of comparison outlets has decreased slightly from 19 to 18 units (22.93% of all properties). Over the same period, the stock of convenience outlets remained static (5.81% of all properties) with no vacant properties at the time of the study, indicating that the centre's vitality and viability was high.

6.2.4 Car Parking:

Car Park	Type & Location	Capacity
Heol-y-Llyfrau	Surface Free, Heol-y-Llyfrau.	32
Hope Street	Surface Free, Hope Street.	25
East Street	Surface Free, East Street	30
TOTAL		**87**

6.2.4 Currently, there are 87 off-street car park spaces in Aberkenfig. The accompanying plan of Aberkenfig shows that the centre lacks banking facilities and that there are some properties which could be left out of the designated boundary in any future reviews. For example, numbers' 32 to 38 Bridgend Road are located within the boundary, but form a row of 4 isolated residential units. It would make little material difference if these properties were not included in the designated ECC boundary in the future. The plan of Aberkenfig clearly illustrates that the intensity of commercial activity is focused on the southern half of the centre, whereas the majority of units located in the northern half of the centre are residential in character.

BLAENGARW - 2003	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	32	35,327
Total Service / Convenience / Comparison / Vacant	14	17,642
Total Other (includes Residential Properties & Community Facilities etc.)	18	17,685
Total Vacant	7	5,748
% Vacant	21.88%	16.27%
Total Convenience	1	1,206
% Convenience	3.13%	3.41%
Total Comparison	2	1,345
% Comparison	6.25%	3.81%
Total Service	4	9,343
% Service	12.50%	26.45%
Convenience Goods		
Bakers & Confectioners	0	0
Butchers & Poulterers	0	0
Grocery	0	0
Off licences / Confectioners / Tobacconists / Newsagents	1	1,206
Total	**1**	**1,206**
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	1	506
Furniture, carpets & textiles	0	0
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	0	0
DIY, hardware & housewares	0	0
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	0	0
Variety, department & catalogue	0	0
Florists, nurserymen & seedsmen	0	0
Toys, hobby, cycle & sports	0	0
Jewellers & repair	0	0
Other	1	840
Total	**2**	**1,346**
Service		
Restaurants, coffee bars, fast food & takeaways	1	678
Pub / Club	2	8,224
Hairdressers, beauty parlours & health centres	1	441
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	0	0
Estate Agents and Valuers	0	0
Professional Services	0	0
Other	0	0
Total	**4**	**9,343**
Distribution of Outlets by Size		
Under 1,000 sq ft.	25	78.13%
Between 1,000 and 2,499 sq. ft.	4	12.50%
Between 2,500 and 4,999 sq. ft.	3	9.38%
Between 5,000 and 9,999 sq. ft.	0	0.00%
Between 10,000 and 14,999 sq. ft.	0	0.00%
Between 15,000 and 19,999 sq. ft.	0	0.00%
Between 20,000 and 29,999 sq ft.	0	0.00%
30,000 sq. ft. and above	0	0.00%
Total	**32**	**100.00%**

6.3 BLAENGARW

6.3.1 The Community Shopping Centre of Blaengarw is a small, isolated ECC, comprising only 32 properties in total. The centre is located at the far north of the Garw Valley, within the County Borough.

6.3.2 The designated ECC boundary of Blaengarw incorporates all properties on Katie Street and also includes properties on Gwendoline Street to the south and the Public Hall on Blaengarw Road.

6.3.3 The small number of properties in this centre, coupled with the fact that there are only 7 properties which are engaged in commercial activity suggest that it has a very localised catchment area.

6.3.4 The 2003 ECC survey for Blaengarw showed that the centre is over-represented by vacant properties, in that there were 7 vacant units. In addition there were 4 service outlets, only 1 outlet selling convenience goods and a further 2 outlets selling comparison goods. Of the commercial activity that exists in the centre, it can be seen that the service sector is the dominant player, this mainly consisting of A3 outlets. Since 2002, the centre has lost 1 convenience outlet, which has subsequently increased the vacancy rate from 6 to 7 properties over this period. 78% of units within the centre are under 1, 000 sq. ft. in size which is characteristic of a community shopping centre in a predominantly residential area.

6.3.5 Car Parking:

Car Park	Type & Location	Capacity
Glaengarw Site	Surface Free, King Edward Street.	25
Alexandra Hotel Site	Surface Free, Victoria Street	20
TOTALS		**45**

6.3.6 The attached plan shows that there are a high number of residential units on the south side of Katie Street. In light of this and the high number of vacant outlets, then a future consideration could be to review the ECC boundary so that it excludes the residential properties on Gwendoline Street.

BRACKLA - 2003	**No. of Units**	**Gross Area (sq. ft.)**
Total Properties Surveyed:	16	44,261
Total Service / Convenience / Comparison / Vacant	14	29,773
Total Other (includes Residential Properties & Community Facilities etc.)	2	14,488
Total Vacant	0	0
% Vacant	0.00%	0.00%
Total Convenience	4	18,180
% Convenience	25.00%	41.07%
Total Comparison	3	4,209
% Comparison	18.75%	9.51%
Total Service	7	7,384
% Service	43.75%	16.68%
Convenience Goods		
Bakers & Confectioners	1	1,066
Butchers & Poulterers	0	0
Grocery	1	13,950
Off licences / Confectioners / Tobacconists / Newsagents	2	3,165
Total	**4**	**18,180**
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	0	0
Furniture, carpets & textiles	0	0
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	0	0
DIY, hardware & housewares	0	0
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	2	3,165
Variety, department & catalogue	0	0
Florists, nurserymen & seedsmen	0	0
Toys, hobby, cycle & sports	0	0
Jewellers & repair	0	0
Other	1	1,044
Total	**3**	**4,209**
Service		
Restaurants, coffee bars, fast food & takeaways	3	3,165
Pub / Club	0	0
Hairdressers, beauty parlours & health centres	1	1,098
Laundries and Dry Cleaners	1	969
Travel Agents	0	0
Banks, Building Societies and Financial Services	0	0
Estate Agents and Valuers	1	1,130
Professional Services	0	0
Other	1	1,023
Total	**7**	**7,384**
Distribution of Outlets by Size		
Under 1,000 sq ft.	1	6.25%
Between 1,000 and 2,499 sq. ft.	12	75.00%
Between 2,500 and 4,999 sq. ft.	0	0.00%
Between 5,000 and 9,999 sq. ft.	2	12.50%
Between 10,000 and 14,999 sq. ft.	1	6.25%
Between 15,000 and 19,999 sq. ft.	0	0.00%
Between 20,000 and 29,999 sq ft.	0	0.00%
30,000 sq. ft. and above	0	0.00%
Total	**16**	**100.00%**

6.4 BRACKLA

6.4.1 The ECC of Brackla is a relatively small, “healthy” community shopping centre, known as the ‘Triangle’ Centre and is located to the east of Bridgend Town Centre.

6.4.2 The ECC boundary encompasses all units within the Brackla Shopping Centre as well as a church and the health and fitness centre, doctor’s surgery, public house and community centre which lie immediately to the east and south. The boundary also includes un-developed land around these two buildings, which provides scope for any future commercial development.

6.4.3 The centre is made up of only 16 properties, but is anchored by the large Co-operative store. In total there are 4 units selling convenience goods and only 3 units selling comparison goods. There were no vacant units at the time of the study, this indicates that the centre has high levels of vitality and viability. Such composition in the diversity of retail uses within the centre is the same as it was in the 2002 ECC Survey. Evidence of high levels of vitality and viability within the centre is further supported by a recent planning application which is currently before the Council for additional retail units at the centre.

6.4.4 Brackla’s community shopping centre contains a satisfactory grouping of shops and services in order to serve its catchment area. However, despite the centre being over-represented in the service sector, it lacks banking and financial services.

CAERAU - 2003	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	54	48,825
Total Service / Convenience / Comparison / Vacant	19	22,916
Total Other (includes Residential Properties & Community Facilities etc.)	35	25,909
Total Vacant	2	2,788
% Vacant	3.70%	5.71%
Total Convenience	2	2,863
% Convenience	3.70%	5.86%
Total Comparison	4	3,563
% Comparison	7.41%	7.30%
Total Service	11	13,702
% Service	20.37%	28.06%
Convenience Goods		
Bakers & Confectioners	0	0
Butchers & Poulterers	0	0
Grocery	2	2,863
Off licences / Confectioners / Tobacconists / Newsagents	0	0
Total	**2**	**2,863**
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	0	0
Furniture, carpets & textiles	0	0
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	0	0
DIY, hardware & housewares	0	0
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	2	1,668
Variety, department & catalogue	0	0
Florists, nurserymen & seedsmen	0	0
Toys, hobby, cycle & sports	0	0
Jewellers & repair	0	0
Other	2	1,894
Total	**4**	**3,562**
Service		
Restaurants, coffee bars, fast food & takeaways	4	2,809
Pub / Club	2	6,620
Hairdressers, beauty parlours & health centres	1	592
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	1	624
Estate Agents and Valuers	0	0
Professional Services	2	2,605
Other	1	452
Total	**11**	**13,078**
Distribution of Outlets by Size		
Under 1,000 sq ft.	43	79.63%
Between 1,000 and 2,499 sq. ft.	8	14.81%
Between 2,500 and 4,999 sq. ft.	3	5.56%
Between 5,000 and 9,999 sq. ft.	0	0.00%
Between 10,000 and 14,999 sq. ft.	0	0.00%
Between 15,000 and 19,999 sq. ft.	0	0.00%
Between 20,000 and 29,999 sq ft.	0	0.00%
30,000 sq. ft. and above	0	0.00%
Total	**54**	**100.00%**

6.5 CAERAU

6.5.1 The ECC of Caerau is located in the Llynfi Valley, to the north of Nantyffyllon. The commercial area of Caerau is made up of 54 properties, and is therefore relatively small. The boundary mainly includes properties along Caerau Road and Dyffryn Road.

6.5.2 The results of the 2003 ECC survey illustrate that Caerau is dominated by residential properties and has more commercial properties providing services than properties selling convenience or comparison goods. Out of the properties surveyed there are 35 residential properties, 11 service outlets, 4 comparison goods outlets and 2 convenience goods outlets. Only 2 units are currently vacant within the ECC, resulting in a vacancy rate of 3.70%. In fact, vacancy rates have fallen since 2002, when there were 4 vacant units within the centre. Over the same period the number of convenience and comparison outlets have remained static, whilst the number of outlets selling services has increased by 1 unit.

6.5.3 The attached plan of Caerau shows that there are a high number of residential properties on Caerau Road, Dyffryn Road and near Talana Terrace. Taking into account these residential areas, consideration may be given to review the ECC boundary to exclude these properties, in the future.

NANTYFFYLLON - 2003	**No. of Units**	**Gross Area (sq. ft.)**
Total Properties Surveyed:	81	61,796
Total Service / Convenience / Comparison / Vacant	12	16,275
Total Other (includes Residential Properties & Community Facilities etc.)	69	45,521
Total Vacant	4	7,675
% Vacant	4.94%	12.42%
Total Convenience	4	4,015
% Convenience	4.94%	6.50%
Total Comparison	2	2,067
% Comparison	2.47%	3.34%
Total Service	2	2,519
% Service	2.47%	4.08%
Convenience Goods		
Bakers & Confectioners	0	0
Butchers & Poulterers	0	0
Grocery	3	3,078
Off licences / Confectioners / Tobacconists / Newsagents	1	936
Total	4	4,015
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	0	0
Furniture, carpets & textiles	0	0
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	0	0
DIY, hardware & housewares	0	0
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	1	915
Chemists, drug stores & opticians	0	0
Variety, department & catalogue	0	0
Florists, nurserymen & seedsmen	0	0
Toys, hobby, cycle & sports	0	0
Jewellers & repair	0	0
Other	1	1,152
Total	**2**	**2,067**
Service		
Restaurants, coffee bars, fast food & takeaways	0	0
Pub / Club	1	1,884
Hairdressers, beauty parlours & health centres	1	635
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	0	0
Estate Agents and Valuers	0	0
Professional Services	0	0
Other	0	0
Total	**2**	**2,519**
Distribution of Outlets by Size		
Under 1,000 sq ft.	68	83.95%
Between 1,000 and 2,499 sq. ft.	11	13.58%
Between 2,500 and 4,999 sq. ft.	2	2.47%
Between 5,000 and 9,999 sq. ft.	0	0.00%
Between 10,000 and 14,999 sq. ft.	0	0.00%
Between 15,000 and 19,999 sq. ft.	0	0.00%
Between 20,000 and 29,999 sq ft.	0	0.00%
30,000 sq. ft. and above	0	0.00%
Total	**81**	**100.00%**

6.6 NANTYFFYLLON

6.6.1 The ECC of Nantyffyllon is located just north of Maesteg and to the south of Caerau within the Llynfi Valley.

6.6.2 The commercial area of Nantyffyllon is a relatively small centre and is made up of only 81 properties in total. The linear ECC boundary of Nantyffyllon runs from north to south encompassing buildings along the southern part of Picton Street, properties on the western side of Grove Street and properties along the eastern side of High Street.

6.6.3 Nantyffyllon's commercial centre is dominated by residential properties which account for 66 out of the 81 surveyed properties. There is very little commercial activity occurring within the designated boundary. The statistics reveal that there are more convenience outlets than comparison and service sector outlets. However, there are just as many vacant outlets as convenience goods outlets. This indicates that Nantyffyllon is a relatively weak centre, serving as a local convenience facility only. The only change which has occurred since the 2002 ECC survey with regard to the centre's retail offer has been the addition of 1 outlet engaging in the provision of services.

6.6.4 The attached plan of Nantyffyllon shows that there is the potential to remove various rows of properties due to their lack of commercial activity (i.e. mainly residential) in any future review, and for the centre to be re-focused at a smaller more viable core area.

NANTYMOEL - 2003	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	124	136,174
Total Service / Convenience / Comparison / Vacant	33	47,846
Total Other (includes Residential Properties & Community Facilities etc.)	91	88,329
Total Vacant	12	19,181
% Vacant	9.68%	14.09%
Total Convenience	7	8,600
% Convenience	5.65%	6.32%
Total Comparison	7	6,232
% Comparison	5.65%	4.58%
Total Service	7	13,832
% Service	5.65%	10.16%
Convenience Goods		
Bakers & Confectioners	1	570
Butchers & Poulterers	1	570
Grocery	3	6,092
Off licences / Confectioners / Tobacconists / Newsagents	2	1,367
Total	**7**	**8,600**
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	1	872
Furniture, carpets & textiles	0	0
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	0	0
DIY, hardware & housewares	2	2,540
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	1	678
Variety, department & catalogue	1	517
Florists, nurserymen & seedsmen	0	0
Toys, hobby, cycle & sports	0	0
Jewellers & repair	0	0
Other	2	1,625
Total	**7**	**6,232**
Service		
Restaurants, coffee bars, fast food & takeaways	3	1,475
Pub / Club	3	11,959
Hairdressers, beauty parlours & health centres	1	398
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	0	0
Estate Agents and Valuers	0	0
Professional Services	0	0
Other	0	0
Total	**7**	**13,832**
Distribution of Outlets by Size		
Under 1,000 sq ft.	95	76.61%
Between 1,000 and 2,499 sq. ft.	19	15.32%
Between 2,500 and 4,999 sq. ft.	5	4.03%
Between 5,000 and 9,999 sq. ft.	5	4.03%
Between 10,000 and 14,999 sq. ft.	0	0.00%
Between 15,000 and 19,999 sq. ft.	0	0.00%
Between 20,000 and 29,999 sq ft.	0	0.00%
30,000 sq. ft. and above	0	0.00%
Total	**124**	**100.00%**

6.7 NANTYMOEL

6.7.1 The ECC of Nantymoel serves as a community shopping centre for the northern part of the Ogmore Valley. The commercial area of Nantymoel is split into three separate centres.

6.7.2 The Northern part of the centre mainly includes properties on Commercial Street as well as a small number of properties along Station Road, Howell Street and Ogmore Terrace. The Central commercial area is strictly confined to properties fronting onto Dinam Street, including the derelict former Nantymoel Infants School building. However, it is the Southern part of the commercial centre which forms the heart of Nantymoel's Established Commercial Centre and it mainly encompasses properties along Ogwy Street and branches off to include properties on the east side of Bwlch-Y-Clawd Road.

6.7.3 The 2003 ECC survey for this centre showed that there were 12 vacant units compared to 7 outlets selling convenience goods, 7 service sector outlets and 7 outlets selling comparison goods. Since the 2002 ECC survey, vacancy rates within the centre have fallen from 14 to 12 properties. The stock of service and comparison outlets has increased by 1 property in the former and 2 properties in the latter. Although vacancy rates have fallen over the past year, this is still a relatively high vacancy rate, and this may indicate that the centre has low levels of vitality and viability. Alternatively it may indicate rapid turnover or transience in business activities. The accompanying statistics and plan of Nantymoel, show that residential dwellings occupy the highest number of properties within the commercial area.

6.7.4 In the light of this, a consideration in the future may be to possibly remove the central commercial area designation from the development plan, due to the fact it contains only one convenience store engaging in commercial activity which may be seen more as a community facility rather than a part of the commercial centre. It may be possible for all three centres to have their boundaries reviewed if it is considered that they all contain high numbers of residential dwellings.

6.7.5 Car Parking:

Car Park	Type and Location	Capacity
Former Railway Yard	Surface Free, Commercial Street	30
Dinam Street	Surface Free, Dinam Street	25
Total		**55**

OGMORE VALE - 2003	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	147	137,886
Total Service / Convenience / Comparison / Vacant	39	50,031
Total Other (includes Residential Properties & Community Facilities etc.)	108	87,855
Total Vacant	11	9,957
% Vacant	7.48%	7.22%
Total Convenience	2	1,851
% Convenience	1.36%	1.34%
Total Comparison	8	11,894
% Comparison	5.44%	8.63%
Total Service	18	26,329
% Service	12.24%	19.09%
Convenience Goods		
Bakers & Confectioners	0	0
Butchers & Poulterers	0	0
Grocery	1	1,184
Off licences / Confectioners / Tobacconists / Newsagents	1	667
Total	**2**	**1,851**
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	0	0
Furniture, carpets & textiles	2	6,114
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	1	1,119
DIY, hardware & housewares	0	0
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	2	2,207
Variety, department & catalogue	0	0
Florists, nurserymen & seedsmen	1	517
Toys, hobby, cycle & sports	0	0
Jewellers & repair	0	0
Other	2	1,938
Total	**8**	**11,894**
Service		
Restaurants, coffee bars, fast food & takeaways	4	5,780
Pub / Club	5	13,078
Hairdressers, beauty parlours & health centres	4	2,680
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	2	2,228
Estate Agents and Valuers	1	592
Professional Services	1	700
Other	2	1,862
Total	**18**	**26,329**
Distribution of Outlets by Size		
Under 1,000 sq ft.	113	76.87%
Between 1,000 and 2,499 sq. ft.	28	19.05%
Between 2,500 and 4,999 sq. ft.	6	4.08%
Between 5,000 and 9,999 sq. ft.	0	0.00%
Between 10,000 and 14,999 sq. ft.	0	0.00%
Between 15,000 and 19,999 sq. ft.	0	0.00%
Between 20,000 and 29,999 sq ft.	0	0.00%
30,000 sq. ft. and above	0	0.00%
Total	**147**	**100.00%**

6.8 OGMORE VALE

6.8.1 The ECC of Ogmore Vale is located within the Ogmore Valley, south of Nantymoel and to the north of Blackmill.

6.8.2 The designated commercial boundary for Ogmore Vale covers a relatively large area and includes properties in a number of streets rather than being confined to properties fronting onto one main street or road. The centre contains 28 commercial units and the boundary includes properties along High Street, Corbett Street, Bethania Row, River Street, Commercial Street and Tynewydd Row.

6.8.3 The results of the 2003 ECC survey show that Ogmore Vale has more commercial properties providing services than properties selling convenience or comparison goods. However, service outlets count for just over 12% of all properties surveyed. Since the 2002 ECC survey, the number of vacant properties within the centre has fallen from 15 to 11 properties. This is a rather significant decrease in vacancy levels and a positive trend, indicating increases in the centre's vitality and viability. Convenience goods outlets account for the least number of properties in that only 1.36% of all properties sold such goods. This trend of a higher number of service sector outlets and lower number of convenience goods outlets closely allies to the general trend for all ECC's within the County Borough.

6.8.4 The attached plan and statistics show that Ogmore Vale's ECC is dominated by residential properties and that there are more residential properties located within the boundary than properties engaged in commercial activity. Out of the 147 properties surveyed, there were 18 service sector outlets (*15 in 2002*), 8 comparison goods outlets (*9 in 2002*), 2 convenience goods outlets (*2 in 2002*) and 100 residential properties (*99 in 2002*). The ECC could be reviewed in the future to exclude the row of houses on the West Side of Corbett Street and the majority of properties along River Street.

6.8.5 <u>Car Parking:</u>

Car Park	Type & Location	Capacity
New Fire Station	Surface Free, A4061	25
Station Yard	Surface Free, Off Commercial Street	50
TOTALS		**75**

PENCOED - 2003	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	90	90,783
Total Service / Convenience / Comparison / Vacant	67	60,579
Total Other (includes Residential Properties & Community Facilities etc.)	23	30,204
Total Vacant	8	6,814
% Vacant	8.89%	7.51%
Total Convenience	7	11,022
% Convenience	7.78%	12.14%
Total Comparison	18	12,874
% Comparison	20.00%	14.18%
Total Service	34	29,870
% Service	37.78%	32.90%
Convenience Goods		
Bakers & Confectioners	1	452
Butchers & Poulterers	1	323
Grocery	3	8,353
Off licences / Confectioners / Tobacconists / Newsagents	2	1,894
Total	**7**	**11,022**
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	3	1,690
Furniture, carpets & textiles	3	3,261
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	3	1,475
DIY, hardware & housewares	0	0
China, glass, fancy & leather goods	2	1,130
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	3	2,766
Variety, department & catalogue	0	0
Florists, nurserymen & seedsmen	2	1,044
Toys, hobby, cycle & sports	1	667
Jewellers & repair	0	0
Other	1	840
Total	**18**	**12,874**
Service		
Restaurants, coffee bars, fast food & takeaways	8	8,213
Pub / Club	3	7,416
Hairdressers, beauty parlours & health centres	9	4,553
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	4	3,821
Estate Agents and Valuers	4	2,336
Professional Services	3	2,088
Other	3	1,442
Total	**34**	**29,870**
Distribution of Outlets by Size		
Under 1,000 sq ft.	64	71.11%
Between 1,000 and 2,499 sq. ft.	22	24.44%
Between 2,500 and 4,999 sq. ft.	3	3.33%
Between 5,000 and 9,999 sq. ft.	1	1.11%
Between 10,000 and 14,999 sq. ft.	0	0.00%
Between 15,000 and 19,999 sq. ft.	0	0.00%
Between 20,000 and 29,999 sq ft.	0	0.00%
30,000 sq. ft. and above	0	0.00%
Total	**90**	**100.00%**

6.9 PENCOED

6.9.1 The ECC of Pencoed is located within the main settlement of Pencoed, to the north of the M4, off Junction 35. Pencoed occupies a ‘border/vale’ location in the east of the County Borough just inside the authority’s eastern boundary but has rail links to Bridgend and Cardiff via its station.

6.9.2 The designated boundary is mostly confined to properties fronting on to Coychurch Road and Penybont Road, as well as extending around the Square and incorporating a small number of properties to the east of Hendre road.

6.9.3 The 2003 ECC study for Pencoed show that the Centre contains more service sector outlets (37.78% of all properties) than outlets selling comparison goods (20% of all properties) and convenience goods (7.78% of all properties). Since the 2002 ECC Survey, the stock of service goods outlets have increased by 1 unit, whilst the stock of comparison and convenience outlets have both decreased by I unit. The large number of service sector outlets is taken up by hairdressers / beauty / health centres and properties engaging in A3 uses.

6.9.4 The vacancy rate for Pencoed’s commercial centre has remained static since the 2002 ECC survey and stands at just over 8%, which is lower than the vacancy rate for all 13 ECC’s within the County Borough which stands at 9.22%. The attached plan shows that there are few residential properties within the centre and these are mainly confined to properties found in the southern part of the designation. High levels of commercial activity appear to be found within properties along the southern part of Coychurch Road, Penybont Road and around the Square. All these factors support a generally vital and viable centre whose boundaries need not be reviewed at present.

6.9.5 <u>Car Parking</u>:

Car Park	Type & Location	Capacity
Heol-y-Groes	Surface Free, Heol-y-Groes	30
Penprysg Road	Surface Free, Penprysg Road	50
Alyson Way	Surface Free	8
TOTALS		**88**

PONTYCYMMER - 2003	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	121	104,259
Total Service / Convenience / Comparison / Vacant	57	64,422
Total Other (includes Residential Properties & Community Facilities etc.)	64	39,837
Total Vacant	14	14,187
% Vacant	11.57%	13.61%
Total Convenience	5	9,096
% Convenience	4.13%	8.72%
Total Comparison	18	16,340
% Comparison	14.88%	15.67%
Total Service	20	24,800
% Service	16.53%	23.79%
Convenience Goods		
Bakers & Confectioners	1	344
Butchers & Poulterers	1	527
Grocery	3	8,224
Off licences / Confectioners / Tobacconists / Newsagents	0	0
Total	**5**	**9,096**
Comparison Goods		
Footwear and Repair	1	1,066
Mens and Boys Wear	1	1,249
Womens, Girls, Children and General Wear	3	2,669
Furniture, carpets & textiles	0	0
Booksellers, arts, crafts, stationers, copy bureaux	2	1,012
Electrical, gas, music & photographic	1	570
DIY, hardware & housewares	2	1,561
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	1	861
Variety, department & catalogue	2	3,864
Florists, nurserymen & seedsmen	1	431
Toys, hobby, cycle & sports	2	1,249
Jewellers & repair	0	0
Other	2	1,808
Total	**18**	**16,340**
Service		
Restaurants, coffee bars, fast food & takeaways	6	6,178
Pub / Club	4	11,334
Hairdressers, beauty parlours & health centres	4	1,873
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	4	4,725
Estate Agents and Valuers	0	0
Professional Services	0	0
Other	2	689
Total	**20**	**24,800**
Distribution of Outlets by Size		
Under 1,000 sq ft.	90	74.38%
Between 1,000 and 2,499 sq. ft.	26	21.49%
Between 2,500 and 4,999 sq. ft.	5	4.13%
Between 5,000 and 9,999 sq. ft.	0	0.00%
Between 10,000 and 14,999 sq. ft.	0	0.00%
Between 15,000 and 19,999 sq. ft.	0	0.00%
Between 20,000 and 29,999 sq ft.	0	0.00%
30,000 sq. ft. and above	0	0.00%
Total	**121**	**100.00%**

6.10 PONTYCYMMER

6.10.1 The ECC of Pontycymmer is located to the north of Pont-y-rhyl, and centrally positioned within the Garw Valley. Blaengarw lies further to the north.

6.10.2 The northern part of the ECC covers a wider area and encompasses properties within Commercial Place, Prospect Place, Chapel Street and William Street, whereas that part to the south of Commercial Place the boundary is strictly confined to Oxford Street and mainly properties on its west side.

6.10.3 The 2003 ECC survey for Pontycymmer showed that just under half of all properties within the boundary engage in non-commercial activity. Out of 121 properties surveyed, there are 64 non-commercial properties, these mainly being residential.

6.10.4 The results of the 2003 ECC survey illustrate that service outlets account for the greatest number of units within the centre and account for 16.53% of all properties, whereas in 2002 comparison goods outlets were the more dominant. In 2003, Comparison goods outlets account for 14.88% of all properties surveyed (*15.13% in 2002*) and convenience outlets account for just 4.13% of all surveyed properties (*4.20% in 2002*). This low proportion of convenience outlets is the trend associated with most ECC's within the County Borough. Vacancy rates within the centre have remained static since 2002 accounting for 14 properties in total, giving a relatively high vacancy rate of 11.57%, which may indicate local vitality and viability of the centre is quite low, or alternatively that there is a rapid turnover or transience in business activity.

6.10.5 The attached plan shows that there are various 'groupings' of residential properties within the boundary of the ECC. For example, all properties within Prospect Place, William Street and Chapel Street are residential. In light of this, the ECC boundary may be subject of a future review to exclude these properties and other properties which also form significant residential 'groupings'.

6.10.6 <u>Car Parking:</u>

Car Park	Type and Location	Capacity
Oxford Street	Surface Free, Oxford Street.	30
TOTAL		**30**

PYLE / KENFIG HILL - 2003	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	200	230,724
Total Service / Convenience / Comparison / Vacant	67	129,587
Total Other (includes Residential Properties & Community Facilities etc.)	133	101,138
Total Vacant	12	17,373
% Vacant	6.00%	7.53%
Total Convenience	5	55,574
% Convenience	2.50%	24.09%
Total Comparison	26	31,571
% Comparison	13.00%	13.68%
Total Service	24	25,069
% Service	12.00%	10.87%
Convenience Goods		
Bakers & Confectioners	0	0
Butchers & Poulterers	1	657
Grocery	2	53,378
Off licences / Confectioners / Tobacconists / Newsagents	2	1,539
Total	**5**	**55,574**
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	2	1,808
Furniture, carpets & textiles	2	850
Booksellers, arts, crafts, stationers, copy bureaux	1	495
Electrical, gas, music & photographic	5	3,229
DIY, hardware & housewares	1	700
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	1	1,184
Chemists, drug stores & opticians	4	3,078
Variety, department & catalogue	2	13,283
Florists, nurserymen & seedsmen	1	743
Toys, hobby, cycle & sports	5	4,338
Jewellers & repair	0	0
Other	2	1,862
Total	**26**	**31,571**
Service		
Restaurants, coffee bars, fast food & takeaways	8	6,598
Pub / Club	1	4,596
Hairdressers, beauty parlours & health centres	3	2,605
Laundries and Dry Cleaners	0	0
Travel Agents	1	840
Banks, Building Societies and Financial Services	4	3,746
Estate Agents and Valuers	2	1,206
Professional Services	4	3,498
Other	1	1,981
Total	**24**	**25,069**
Distribution of Outlets by Size		
Under 1,000 sq ft.	165	82.50%
Between 1,000 and 2,499 sq. ft.	29	14.50%
Between 2,500 and 4,999 sq. ft.	3	1.50%
Between 5,000 and 9,999 sq. ft.	1	0.50%
Between 10,000 and 14,999 sq. ft.	1	0.50%
Between 15,000 and 19,999 sq. ft.	0	0.00%
Between 20,000 and 29,999 sq ft.	0	0.00%
30,000 sq. ft. and above	1	0.50%
Total	**200**	**100.00%**

6.11 PYLE / KENFIG HILL

6.11.1 The commercial area of Pyle / Kenfig Hill is split into 2 separate centres. Strategically, both centres are closely located to the authority's western boundary.

6.11.2 That part of the ECC centred on Pyle Cross is located in Pyle and is dominated by the Co-operative Pioneer food store but also encompasses a small number of properties fronting onto Pyle Road and Ffald Road. The eastern part of the ECC is focussed on Kenfig Hill and is mainly confined to properties along the main streets of Commercial Street, Bridge Street, Prince Road and Pisgah Street.

6.11.3 There has been very little change in the centre's retail activity since the 2002 ECC Survey. In terms of units engaging in commercial activity, the only change over this period has been the addition of 1 comparison goods outlet. The statistics compiled for both parts of the ECC suggest that there is steady commercial activity occurring within them. Out of 200 properties surveyed, 55 of these are engaged in commercial activity. However, planning activity suggests that the vitality and viability of the part of the centre in Kenfig Hill, is encouraged by the dominance of residential properties. Kenfig Hill's commercial centre also has its fair share of vacant properties and has a vacancy rate of 6% (i.e. 12 properties) however this is lower than the general vacancy rate for the whole County Borough (9.22%). There are no vacant properties within Pyle Cross, indicating greater vitality and viability in this part of the centre which is anchored by the Co-op foodstore.

6.11.4 The number of units engaging in commercial activity is dominated by outlets selling comparison goods (13%) and services (12%), where as convenience goods outlets only account for 2.5% of all properties surveyed. However, convenience goods occupy the largest area of gross floorspace (24.09%) despite this type of outlet accounting for the smallest number. This is explained by the sheer scale of convenience goods offered by the Co-operative Pioneer food store.

6.11.5 The attached plan of Kenfig Hill's ECC, shows that there are large groupings of residential properties, particularly on the Northern side of Commercial Street and on both sides of Prince Road. Future boundary reviews should take this into account, with the possibility of excluding them from the ECC.

6.11.6 <u>Car Parking (Kenfig Hill)</u>

Car Parking	**Type & Location**	**Capacity**
Pisgah Street	Surface Free, Lane to side of surgery , Pisgah Street	48
Croft Goch Road	Surface Free, Off Croft Goch Road	21
TOTAL		**69**

ESTABLISHED COMMERCIAL CENTRES BRIDGEND COUNTY BOROUGH - 2003	No. of Units	Gross Area (Sq. ft.)
Total Properties Surveyed:	1848	2,533,753
Total Service / Convenience / Comparison / Vacant	1077	1,784,175
Total Other (includes Residential Properties & Community Facilities etc.)	771	749,577
Total Vacant	157	220,832
% Vacant	9.22%	8.87%
Total Convenience	78	220,143
% Convenience	4.29%	8.89%
Total Comparison	384	620,920
% Comparison	20.73%	23.72%
Total Service	458	722,280
% Service	21.98%	62.38%
Convenience Goods		
Bakers & Confectioners	15	13,175
Butchers & Poulterers	10	8,342
Grocery	34	180,339
Off licences / Confectioners / Tobacconists / Newsagents	19	18,288
Total	**78**	**220,143**
Comparison Goods		
Footwear and Repair	16	20,699
Mens and Boys Wear	6	8,256
Womens, Girls, Children and General Wear	63	111,094
Furniture, carpets & textiles	38	56,360
Booksellers, arts, crafts, stationers, copy bureaux	23	26,189
Electrical, gas, music & photographic	46	44,272
DIY, hardware & housewares	16	18,686
China, glass, fancy & leather goods	13	11,464
Cars, motorcycles & motor accessories	4	6,243
Chemists, drug stores & opticians	44	64,088
Variety, department & catalogue	20	123,333
Florists, nurserymen & seedsmen	10	6,835
Toys, hobby, cycle & sports	29	33,250
Jewellers & repair	13	11,747
Other	43	78,404
Total	**384**	**620,920**
Service		
Restaurants, coffee bars, fast food & takeaways	118	144,753
Pub / Club	61	184,816
Hairdressers, beauty parlours & health centres	63	40,160
Laundries and Dry Cleaners	5	7,416
Travel Agents	15	17,265
Banks, Building Societies and Financial Services	58	86,122
Estate Agents and Valuers	29	29,149
Professional Services	43	42,012
Other	66	170,586
Total	**458**	**722,280**
Distribution of Outlets by Size		
Under 1,000 sq ft.	1142	61.86%
Between 1,000 and 2,499 sq. ft.	519	28.11%
Between 2,500 and 4,999 sq. ft.	122	6.61%
Between 5,000 and 9,999 sq. ft.	44	2.38%
Between 10,000 and 14,999 sq. ft.	14	0.76%
Between 15,000 and 19,999 sq. ft.	4	0.22%
Between 20,000 and 29,999 sq ft.	2	0.11%
30,000 sq. ft. and above	1	0.05%
Total	**1846**	**100.11%**

Figures do not include Out/Edge-Of-Centre Retail Parks and Foodstores or McArther Glen Designer Outlet Village.

RETAIL PARKS / FOODSTORES - 2003	No. of Units	Gross Area (sq. ft.)
Edge/Out of Centre		
Total Properties Surveyed:	23	464,344
Total Service / Convenience / Comparison / Vacant	23	464,344
Total Other (includes Residential Properties & Community Facilities etc.)	0	0
Total Vacant	0	0
% Vacant	0.00%	0.00%
Total Convenience	6	225,342
% Convenience	26.09%	48.53%
Total Comparison	17	238,992
% Comparison	73.91%	51.47%
Total Service	0	0
% Service		
Convenience Goods		
Bakers & Confectioners	0	0
Butchers & Poulterers	0	0
Grocery	6	225,342
Off licences / Confectioners / Tobacconists / Newsagents	0	0
Total	**6**	**225,342**
Comparison Goods		
Footwear and Repair	1	10,000
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	0	0
Furniture, carpets & textiles	6	58,017
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	2	19,999
DIY, hardware & housewares	5	125,422
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	1	10,064
Chemists, drug stores & opticians	0	0
Variety, department & catalogue	1	5,490
Florists, nurserymen & seedsmen	0	0
Toys, hobby, cycle & sports	1	10,000
Jewellers & repair	0	0
Other	0	0
Total	**17**	**238,992**
Service		
Restaurants, coffee bars, fast food & takeaways	0	0
Pub / Club	0	0
Hairdressers, beauty parlours & health centres	0	0
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	0	0
Estate Agents and Valuers	0	0
Professional Services	0	0
Other	0	0
Total	**0**	**0**
Distribution of Outlets by Size		
Under 1,000 sq ft.	0	0.00%
Between 1,000 and 2,499 sq. ft.	0	0.00%
Between 2,500 and 4,999 sq. ft.	0	0.00%
Between 5,000 and 9,999 sq. ft.	7	30.43%
Between 10,000 and 14,999 sq. ft.	9	39.13%
Between 15,000 and 19,999 sq. ft.	1	4.35%
Between 20,000 and 29,999 sq ft.	1	4.35%
30,000 sq. ft. and above	5	21.74%
Total	**23**	**100.00%**
Figures do not include McArther Glen Designer Outlet Village.		

BRIDGEND COUNTY BOROUGH - 2003	No. of Units	Gross Area (Sq. ft.)
Total Properties Surveyed:	1871	2,998,087
Total Service / Convenience / Comparison / Vacant	1100	2,248,509
Total Other (includes Residential Properties & Community Facilities etc.)	771	749,577
Total Vacant	157	220,832
% Vacant	9.10%	7.96%
Total Convenience	84	445,485
% Convenience	4.55%	15.11%
Total Comparison	401	859,912
% Comparison	21.40%	28.86%
Total Service	458	722,280
% Service	21.78%	19.50%
Convenience Goods		
Bakers & Confectioners	15	13,175
Butchers & Poulterers	10	8,342
Grocery	40	405,681
Off licences / Confectioners / Tobacconists / Newsagents	19	18,288
Total	**84**	**445,485**
Comparison Goods		
Footwear and Repair	17	30,699
Mens and Boys Wear	6	8,256
Womens, Girls, Children and General Wear	63	111,094
Furniture, carpets & textiles	44	114,377
Booksellers, arts, crafts, stationers, copy bureaux	23	26,189
Electrical, gas, music & photographic	48	64,271
DIY, hardware & housewares	21	144,108
China, glass, fancy & leather goods	13	11,464
Cars, motorcycles & motor accessories	5	16,307
Chemists, drug stores & opticians	44	64,088
Variety, department & catalogue	21	128,823
Florists, nurserymen & seedsmen	10	6,835
Toys, hobby, cycle & sports	30	43,250
Jewellers & repair	13	11,747
Other	43	78,404
Total	**401**	**859,912**
Service		
Restaurants, coffee bars, fast food & takeaways	118	144,753
Pub / Club	61	184,816
Hairdressers, beauty parlours & health centres	63	40,160
Laundries and Dry Cleaners	5	7,416
Travel Agents	15	17,265
Banks, Building Societies and Financial Services	58	86,122
Estate Agents and Valuers	29	29,149
Professional Services	43	42,012
Other	66	170,586
Total	**458**	**722,280**
Distribution of Outlets by Size		
Under 1,000 sq ft.	1142	61.10%
Between 1,000 and 2,499 sq. ft.	519	27.77%
Between 2,500 and 4,999 sq. ft.	122	6.53%
Between 5,000 and 9,999 sq. ft.	51	2.73%
Between 10,000 and 14,999 sq. ft.	23	1.23%
Between 15,000 and 19,999 sq. ft.	5	0.27%
Between 20,000 and 29,999 sq ft.	3	0.16%
30,000 sq. ft. and above	6	0.32%
Total	**1869**	**100.00%**
Figures do not include McArther Glen Designer Outlet Village.		

6.12 CONCLUSIONS

6.12.1 The results of the second annual Bridgend Retail Survey indicate that there is over 2.5 million square feet of floorspace in the Established Commercial Centres of the County Borough, with just over 1.7 million of that area in commercial use (a rise on the previous year). Approximately 9% of the units and total floorspace are vacant, which is below the national average. Convenience goods representation is very low (approximately 4.3%) indicating that the ECCs have suffered greatly from competition from the larger out-of-centre foodstores.

6.12.2 The retail parks and out-of-centre stores continue to perform very well, with a 100% occupancy rate. The survey this year does not include the ancillary uses to the retail parks, however it is envisaged that in future years it will be possible to incorporate these (drive-thru's, car garages etc.). The retail parks / foodstores account for approximately 25% of all commercial floorspace within the County Borough.

6.12.3 In total Bridgend County Borough has approximately 3 million square feet of floorspace within its ECCs, Retail Parks and Foodstores (excluding McArther Glen Designer Outlet Village), which incorporates over 2.2 million square feet of commercial floorspace. Floorspace vacancy rates lie at 7.96% of total floorspace and 9.10% of commercial floorspace (which is lower than the national average).

6.12.4 This second survey has built upon last years study which provided a sound basis for future reviews of retailing provision in the County Borough; and the vitality, viability and attractiveness of its Established Commercial Centres. These statistics, when recorded and compared on an annual basis, will facilitate trends to be observed over time, and enable planning policies of the County Borough Council to be monitored and, where necessary, to be updated in response to the need for change.