RETAILING AND COMMERCIAL CENTRES IN BRIDGEND COUNTY BOROUGH

2004

CONTENTS

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RETAILING IN BRIDGEND COUNTY BOROUGH 2004

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 This is the seventh consecutive year in which a Health Check has been carried out for Bridgend Town Centre and the third year 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 their respective 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 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 are 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 2004 Health Check will build on the data from the last two years, where emerging trends in the time-tracked data can become apparent so as to monitor 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

3.1 INTRODUCTION

3.1.1 The health check for Bridgend town centre for 2003 concluded that whilst the ongoing environmental improvements were making the town centre a more pleasant environment, in terms of the economic indicators (including rental figures and the number of national multiple retailers) the town was lagging behind its sub-regional competitors.

3.1.2 Retail rents had remained stable, whilst Office rents had increased so that they were above Swansea and equal to Newport. This, coupled with a drop in the commercial yield for the town was a very encouraging sign for an up-surge in investment in the town.

3.2 RETAIL AND OFFICE FLOORSPACE RENTS AND COMMERCIAL YIELD

Primary Retail Rents

3.2.1 Primary retail rents have risen in Bridgend (to £65 per sq. ft.) for the first time since 1999. This rise is also replicated in Pontypridd, Swansea and Cardiff centres. However, Neath, which has seen a stagnant rent of £70 since 1999 again experienced no change in 2004, as did Newport and Llanelli. Colliers CRE report that Bridgend was the 6th best performing centre in Wales with this growth of 8.3% in primary retail rents (Wales average = 3.4%). Bridgend now attracts the ninth best primary retail rent in Wales.

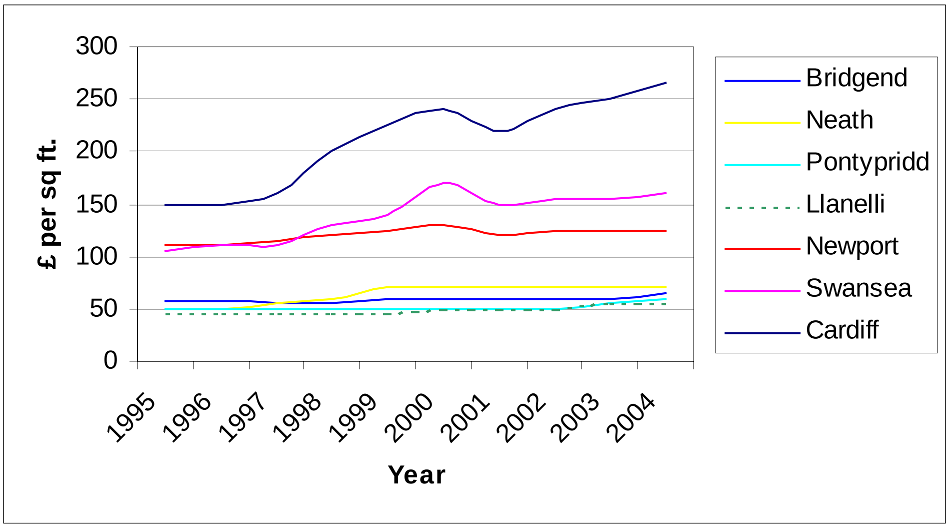


Figure 2 Primary Retail Rents

Source: Colliers CRE

3.2.2 Retail rents at the out-of-centre retail warehouse parks of the Borough have soared to £17 per sq ft. compared with £13.50 in 2003. This 26% jump is (again) likely to have been caused by the supply of out-of-centre retailing sites decreasing in light of stricter government retail planning policy. In Bridgend County Borough this has recently been demonstrated by the deletion of the Sarn Park bulky-goods retailing allocation from the Unitary Development Plan.

3.2.3 Unfortunately, it has not been possible to source accurate and consistent data for secondary shopping areas for this year's Health Checks.

Commercial Yield

3.2.4 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 values 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.

3.2.5 The yield for Bridgend fell for the second year in succession (to 8%) suggesting continuing growing investor confidence in the town centre. Whilst Llanelli and Swansea also experienced falls in their yield, other centres of similar size to Bridgend (Neath and Pontypridd) saw no change in their respective rates, likewise for Cardiff and Newport.

3.2.6 In last year's health check it was reported that in the draft *Wales Spatial Plan,* commercial yield was used as the one indicator of town centre vitality. It is pleasing to note that the final version of the document does not include this reference.

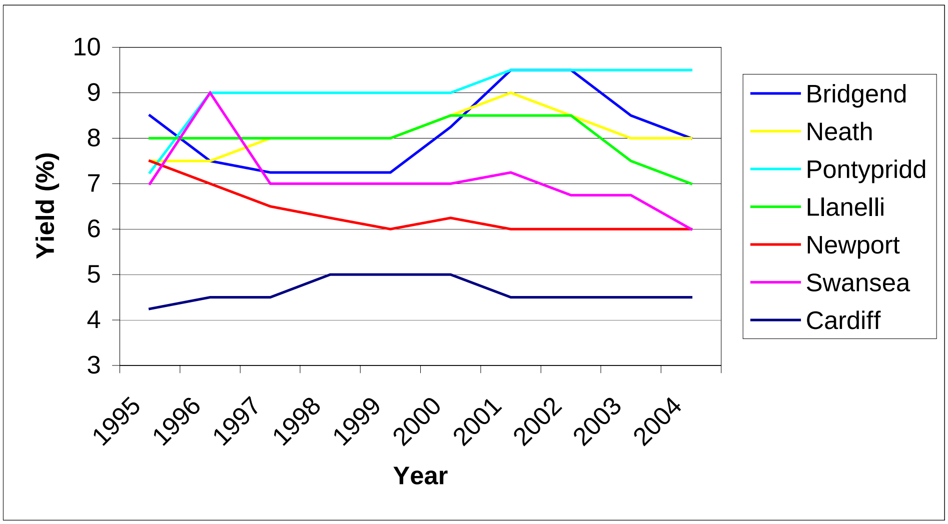


Figure 3 Retail Yields

Source: VOA

Office Rents

3.2.7 Prime Office Rents in Bridgend have remained stable at £14 per sq ft, whilst still remaining above that of Swansea (£12.50 per sq ft.) This has been achieved by the letting of several high profile office tenancies during 2004, most notably by MarketSafe.com at the Ravenscourt Development and Valleys to Coast Housing Association (V2C) at the new office development at the former Chest Clinic (now Nolton Court).

3.2.8 These developments will give great confidence to the office market in Bridgend Town Centre, as well as providing more users of town centre shops and services. However, high office rents will mean that those wishing to start a new office-based business in the town centre could be 'priced-out' of the market. However, a healthy on-going supply of readily available office units continues to be available in the town centre, including the former Oldcastle Surgery and numerous units in the Court Road / Station Hill area.

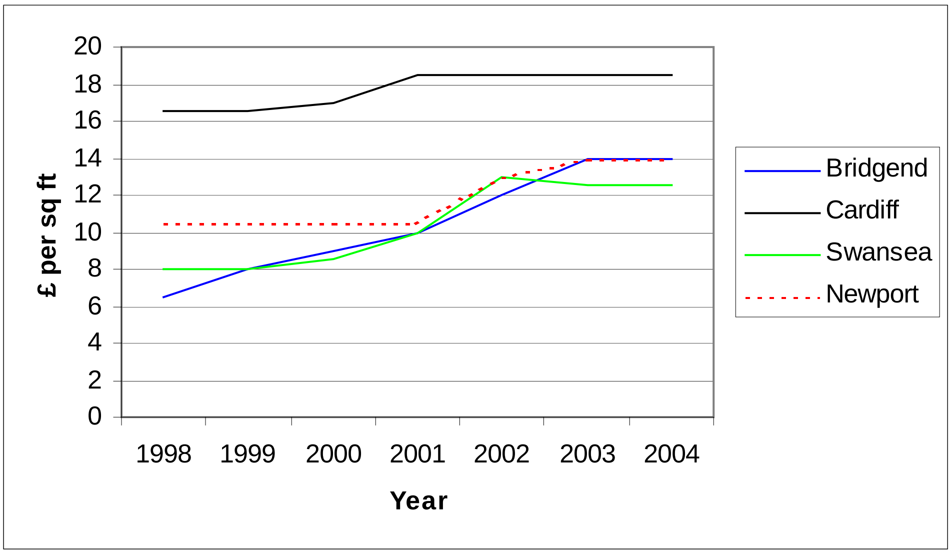


Figure 4 Prime Office Rents

Source: Cooke and Arkwright / Bridgend CBC / GVA Grimley

3.3 RETAILER REPRESENTATION & CHANGE AND DIVERSITY OF USES

3.3.1 Table 1 below shows the results of the October 2004 Bridgend County Borough Retail Survey for Bridgend Town Centre (see section 6 of this document). The number and type of convenience goods outlets has remained the same for the past 3 years. In terms comparison goods, whilst the total number of units has fallen by 3, this disguises more complex changes which has involved the net loss of one shoe shop, one hardware store, 3 'gift' shops and one jewellers. However, the town centre has net-gained one additional card shop, one health food shop and one toyshop.

3.3.2 In terms of service provision, the number of 'named' service types has actually declined with the loss of two financial and professional services units and 1 estate agent. The apparent rise in the total number of service units has been the result of a re-classification exercise which resulted in some 'other properties' being redefined as other 'service' units to more accurately reflect the situation.

3.3.3 One (inter) national multiple has located to Bridgend town centre in 2004; Subway. Whilst this number is low it is an improvement on 2003 when no new multiples located to Bridgend. In addition to this, in early 2005 it is expected that a 300m² Monsoon / Accessorize development by Hawkstone Limited will open on Adare Street. Not only will this bolster the existing good provision of womenswear but it will give a tremendous boost to the town centre as a whole, which could lead to further inward investment from other large national multiples.

Convenience Goods	**2000***	**2001***	**2002#**	**2003#**	**2004#**
Bakers & Confectioners	7	6	5	5	5
Butchers & Poulterers	1	1	1	1	1
Grocery	6	6	5	5	5
Off licences / Confectioners / Tobacconists / Newsagents	2	2	2	2	2
Total	**16**	**15**	**13**	**13**	**13**
Comparison Goods					
Footwear and Repair	9	9	6	6	5
Mens and Boys Wear	5	3	4	4	4
Womens, Girls, Children and General Wear	29	29	26	27	27
Furniture, carpets & textiles	13	14	13	13	13
Booksellers, arts, crafts, stationers, copy bureaux	12	14	9	10	11
Electrical, gas, music & photographic	15	18	20	21	21
DIY, hardware & housewares	7	5	6	5	4
China, glass, fancy & leather goods	10	8	6	8	5
Cars, motorcycles & motor accessories	2	2	1	1	1
Chemists, drug stores & opticians	10	11	13	13	14
Variety, department & catalogue	3	5	7	7	7
Florists, nurserymen & seedsmen	3	2	3	2	2
Toys, hobby, cycle & sports	11	11	9	9	10
Jewellers & repair	8	7	9	8	7
Other	7	8	13	14	14
Total	**144**	**146**	**145**	**148**	**145**
Service					
Restaurants, coffee bars, fast food & takeaways	33	36	36	38	38
Pub / Club			18	19	19
Hairdressers, beauty parlours & health centres	25	24	20	21	21
Laundries and Dry Cleaners	1	1	1	1	1
Travel Agents	8	7	7	7	7
Banks, Building Societies and Financial Services	21	22	25	26	25
Estate Agents and Valuers	12	9	13	12	11
Professional Services			13	18	16
Other	5	5	23	18	26
Total	**105**	**104**	**156**	**160**	**164**
TOTAL COMPARISON / CONVENIENCE / SERVICE	**265**	**265**	**314**	**321**	**322**
VACANT UNITS	**33**	**35**	**57**	**53**	**58**
VACANT UNITS (% OF TOTAL)	**11.07**	**11.63**	**12.20**	**11.35**	**12.45**
RESIDENTIAL PROPERTIES			**60**	**60**	**60**
TOTAL OTHER PROPERTIES	**5**	**5**	**36**	**33**	**26**
TOTAL	**265**	**261**	**467**	**467**	**466**
Sources: *Experian Goad; # Bridgend CBC					

Table 1 Retail and Service Provision in Bridgend Town Centre

3.3.4 In terms of vacancy rates, whilst it is disappointing to see the percentage of vacant properties rise to 12.45%, it should be remembered that that the national average is approximately 10.6%, which is still comparable with that of Bridgend. It is important for a town centre to retain a consistent supply of vacant units so as to present numerous opportunities for potential investors to locate their retail and /

or service businesses. It is also apparent from the Retail Survey Plans that a number of the vacant properties identified are in-line for rehabilitation / removal as part of town centre redevelopment schemes. For example, the Elder Yard site contains 8 properties, all of which are unfit for occupation. When this site is redeveloped, there is the potential for the vacancy rate to fall to approximately 10.5%.

Distribution of Outlets by Size	Number	%
Under 1,000 sq ft.	222	47.64%
Between 1,000 and 2,499 sq. ft.	159	34.12%
Between 2,500 and 4,999 sq. ft.	50	10.73%
Between 5,000 and 9,999 sq. ft.	22	4.72%
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	**466**	**100.00%**

Table 2 Outlet Size Distribution

Source: Bridgend CBC

3.3.5 Table 2 breaks down the number of outlets in the town centre based on their size. As in previous years it is clear that the supply of larger retail units is limited. However, this situation will improve with any redevelopment of the Brackla Street centre and the construction of the proposed Asda store at Cheapside. In future, the redevelopment of the key retail redevelopment sites as allocated in the Unitary Development Plan will also contribute to providing larger retail units more appropriate for modern retailers. A capacity assessment of these sites will need to be carried out to inform just how much that contribution would be.

Bridgend Market

3.3.6 As last year, in 2004 the composition of Bridgend's Indoor Market has been surveyed, (see table 3) to recognise the contribution that it makes to the supply of goods and services to town centre users.

3.3.7 As last year, it is clear that Bridgend's Indoor Market makes a significant contribution to the offer and choice available to the users and shoppers of Bridgend Town Centre. These include many of the smaller, traditional 'convenience' goods stalls, which have generally disappeared from the wider town centre.

BRIDGEND MARKET - 2004	No. of Units
Convenience	
Butchers and Poulterers	4
Grocery	2
Off Licences / Confectioners / Tobacconists / Newsagents	2
Total	**8**
Comparison	
Footwear and Repair	1
Womens, Girls, Children and General Wear	3
Furniture, carpets and textiles	1
Booksellers, Arts, Crafts, Stationers, Copy Bureaux	1
Electrical, gas, music & photographic	2
China, glass, fancy and leather goods	3
Florists, Nurserymen and Seedsmen	1
Variety, department and catalogue	1
Toy, Hobby, Cycle and Sports	1
Other	3
Total	**17**
Service	
Restaurants, Coffee Bars, Fast Food and Takeaways	3
Hairdressers, Beauty Parlours and Health Centres	1
Other	2
Total	**6**

Table 3 Retail Provision in Bridgend Market

Source: Bridgend CBC

3.4 PEDESTRIAN FLOW

3.4.1 2004 witnessed a change in the way pedestrian flows were recorded in Bridgend Town Centre. The Rhiw Centre has replaced its system of manual counting with an electronic automatic counting system. Bridgend County Borough Council has also installed two cameras in other locations within the town centre to supplement this data.

3.4.2 Whilst these cameras cannot record the absolute total number of visitors to the town centre (because, by their very nature, they will only count the number of people passing a fixed location, thereby both potential double-counting some people and miss any person visiting the centre but not passing over that point) they do give accurate measures of pedestrian *flow*, which can be compared, week-on-week and year-on-year. The 2005 Health Check will therefore be able to give an accurate review of footfall figures over the camera's first year in operation, with annual comparisons being enabled after that.

3.4.3 The manual and automatic counts for the Rhiw Centre are contained in figures 5 and 6 below. Whilst these two sets of data cannot be compared as they are from different sources, they are indicative of the rate of flow of pedestrians over the year. The year-on-year comparison for the Rhiw Centre indicates an average increase of 4.2% footfall up to mid-April 2004. This was boosted by a 34% increase in footfall of comparable weeks of 2003 and 2004 by the Continental Market held on the 15th - 18th April. (see photograph below).

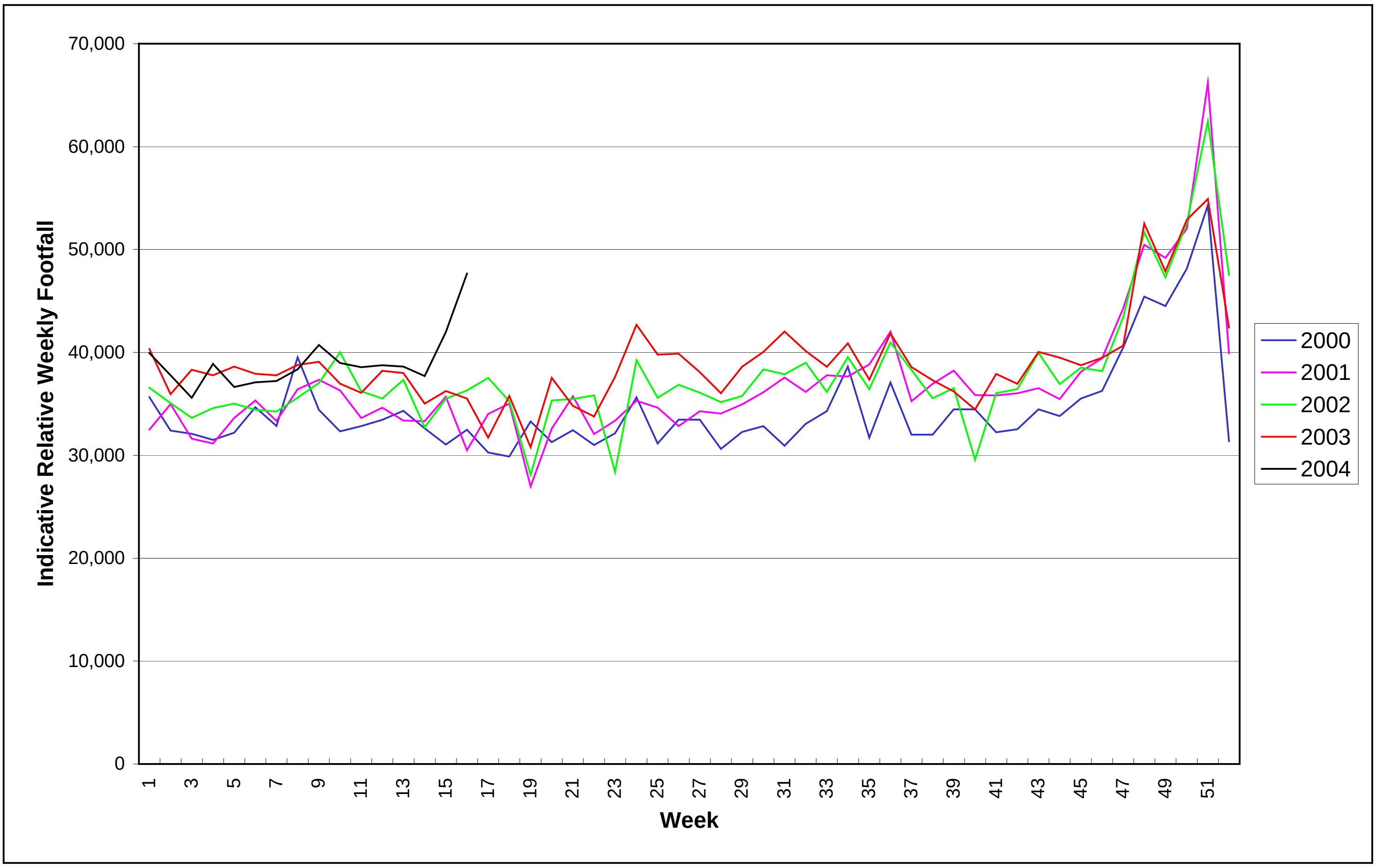


Figure 5 Rhiw Centre manually collected footfall data

Source: Rhiw Centre Management

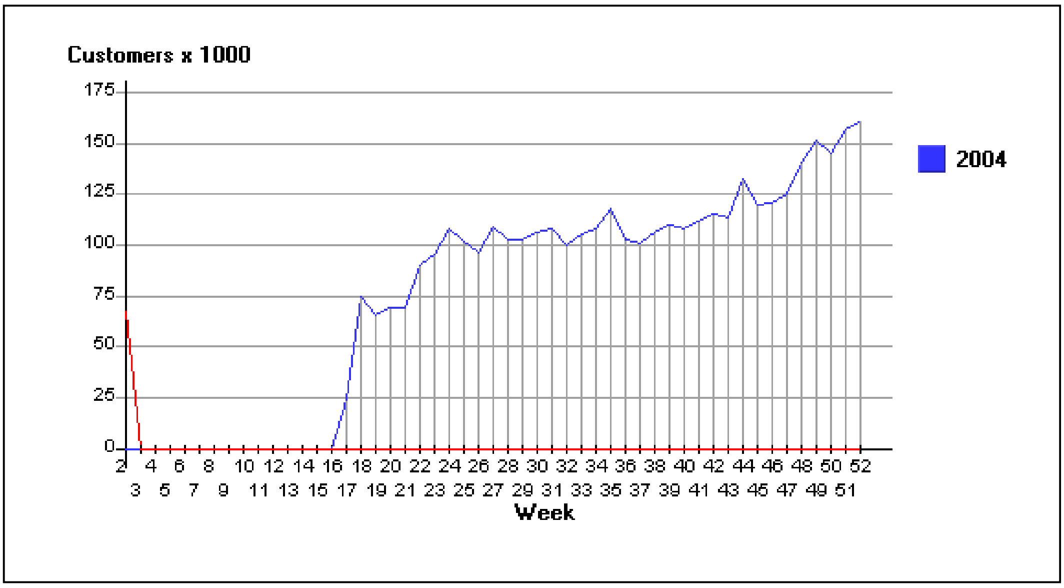


Figure 6 Rhiw Centre automated footfall data

Source: Rhiw Centre Management c/o Springboard

Figure 7.1 Cultural Events help increase the footfall in Bridgend Town Centre

Source: Bridgend CBC

Figure 7.2 Bridgend's new Bus Station: increasing accessibility

3.5 ACCESSIBILITY

3.5.1 The major transformation to occur in improving accessibility to the town centre in 2004 was the opening of the new £2.3m state-of-the-art bus station. The new terminal boasts a landmark tower and a single-storey structure powered by solar rooftop panels. The exterior features extra bays, more room for buses to manoeuvre and an improved entrance and exit system. Inside the station, passengers will benefit from an all-weather waiting area, improved safety and security with CCTV and emergency help points, touch-screen public information kiosks, a public address system, toilets, baby changing rooms, a shop and facilities for bus drivers.

3.5.2 Bus service provision, both internally within and externally beyond the County Borough has remained good. The railway continues to provide regular commuter and long-distance services to and from Bridgend Station. These are due to be enhanced in June 2005 by the reopening of the Vale of Glamorgan line to passenger services. This will mean that not only will passengers from Llantwit Major and Rhoose be able to access Bridgend by rail, passengers from Barry and the eastern Vale will be able to catch direct services to Bridgend without the need to transfer at Cardiff Central. The level of car-parking provision has remained stable in the town centre during 2004.

3.5.3 Safer accessibility to shops and services in the town centre has continued with the experimental second phase of pedestrianisation, which began in November with a simultaneous public consultation exercise running to May 2005. The experimental order sees pedestrianisation extended 10am – 6pm to Queen Street, Dunraven Place, Market Street (between Dunraven Place and Quarella Road), Cross Street and Elder Street. Other measures include increased disabled parking, new taxi ranks and additional measures to aid in traffic issues associated with the 'night-time economy' of the town.

3.6 PERCEPTION OF SAFETY / OCCURRENCE OF CRIME

3.6.1 The Bridgend Community Safety Partnership, under the *'Safer Bridgend'* initiative, established a Taxi marshalling scheme over the Christmas period. In addition, the partnership was involved in Operation STAND, a multi-agency operation targeting town centre disorder. Initiatives under this programme included: visits by the police, local authority licensing officers and fire officers to licensed premises; trading standards officers conducting 'test purchases' for sales to under age persons etc; and increased Truancy patrols during the run-up to Christmas. All these schemes have proved highly effective.

3.7 ENVIRONMENTAL QUALITY

3.7.1 Environmental improvements in the town centre have continued throughout 2004. This has included over £35,000 being awarded to three major prominent schemes under the Council's and WDA's Town Improvement Grant (TIG) scheme which has resulted in attracting considerable private sector investment of building improvements. Work is due to commence on the restoration and improvement of the setting of the Grade II Listed Randall Memorial Drinking Fountain, a scheme which has been developed by Bridgend Town Council in liaison with the County Borough Council.

3.7.2 The Council has also been highly successful in attracting grant funding for other major projects. These include: Welsh Assembly Government Physical Regeneration Fund (Implementation) grant of £800,000 towards a total project cost of £1.1 million of public realm improvements as part of Phase IV of the regeneration programme within Queen Street and Dunraven Place. As part of this award, £200,000 has been allocated for building improvements and refurbishment.

3.7.3 Working with the Assembly Government and the Environment Agency, the Council has also secured over £160,000 of grants for a feasibility and detailed design study of the proposed River Ogwr Walkway along the town centre stretch of the river. This idea was first proposed as part of the Elder Street / Dunraven Place Townscape Heritage Initiative bid of June 2004 (see figure 5.1 below). Following this bid, the Council have been initially awarded some £910,000 by the Heritage Lottery Fund in order to undertake a conservation-led physical regeneration of the historic core of the Town Centre at Dunraven Place and Elder Street. Other funding sources for the THI scheme include Cadw, Welsh Development Agency, Special Regeneration Fund and Physical Regeneration Fund (as previously mentioned) which should provide a total common fund of up to £2 million for the scheme. A significant amount of private sector investment will be levered by this scheme as well as those previously mentioned.

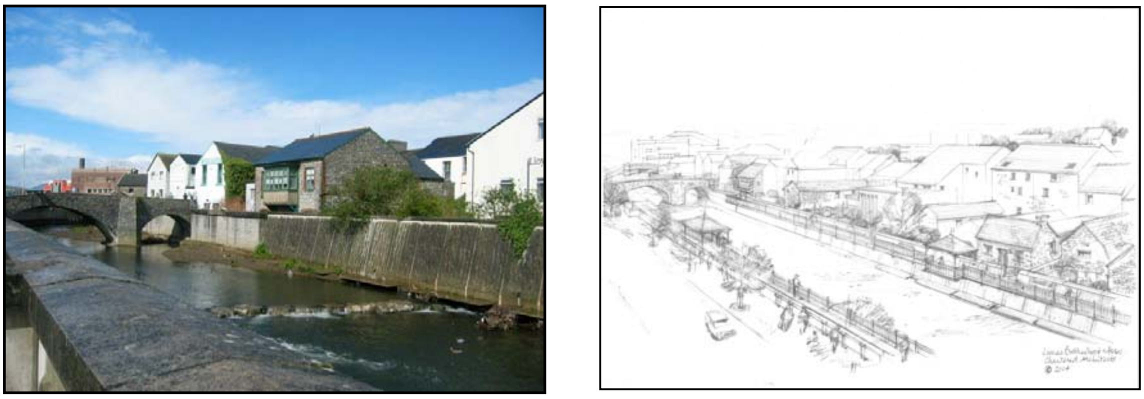


Figure 8.1 Proposed Bridgend Town Centre riverside walkway

Source: BCBC / GVA Grimley / James Brotherhood Associates

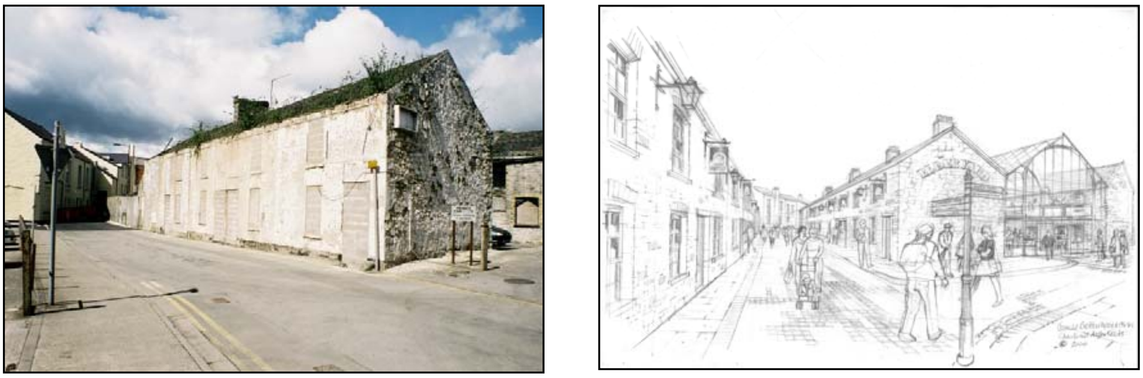


Figure 8.2 Elder Street proposals

Source: BCBC / GVA Grimley / James Brotherhood Associates

3.7.4 Once completed, all of these improvements will create the conditions for further private investment and businesses to locate to the town centre, greatly aiding in it's regeneration. The implementation of these schemes and grants will be reported in subsequent health checks.

3.8 CUSTOMER VIEWS

3.8.1 Since the 2003 Health Check, there have been no other surveys of users of the town centre than the Research and Marketing report, which featured extensively in last year's report. However, the Regeneration Group is looking at establishing a timetable for repeating the survey on a regular basis (every 2-3 years) in order that a consistent approach can be taken to assess the public's views of the town centre and it's environment.

3.8.2 This original survey is still proving to be very useful, and the Regeneration Operational Group will continue to examine the report and its findings in great detail in order that it can re-evaluate it's work programme and priorities.

3.9 Conclusions

3.9.1 Economically, Bridgend town centre had a much improved year in 2004 compared with the previous years, with renewed rises in retail rents and a continued fall in investment yields, indicating renewed confidence in the town centre. This has been exemplified by new retail developments in the prime shopping area of the town centre, as well as new high-quality office developments and occupancies.

3.9.2 Whilst vacancy rates did rise in 2004, this is thought to be a short-term issues which will be resolved once some of the major redevelopment proposals are implemented. Whilst only one new national multiple located to the town during the year, other schemes which are known to be bringing more during 2005 are being developed.

3.9.3 Accessibility to the town centre remains as high as ever and this is exemplified by the continual rise in footfall during the year. The new Bus Station has bolstered public transport provision into the centre and this continued new provision of service will rise again during 2005 with the reopening of the Vale of Glamorgan line in June.

3.9.4 The ongoing public realm improvements and experimental pedestrianisation schemes continue to improve the environment for users of the town centre. The Town Improvement Grant scheme continues to support private individuals and businesses who may wish to renovate their premises. Preliminary design work in relation to the Townscape Heritage Initiative bid has introduced exciting new concepts and proposals, particularly for Elder Yard and the proposed riverside walkway.

3.9.5 Bridgend town centre has had a good year in terms of the majority of vitality indicators: increased rents, lower yields, greater accessibility, more footfall and successful regeneration grant bids attached to innovative site-specific proposals. Whilst the ongoing pedestrianisation schemes have proved to have a mixed reception from traders, there is no doubt that they offer users of the town centre a more pleasant and safer environment to conduct their business.

3.9.6 The Council will continue to consult with businesses in the town centre on future enhancement works and will also, in conjunction with its partners, be working proactively with the commercial sector to assist in bringing forward redevelopment schemes on Council identified sites, such as the Asda store at Cheapside.

PORTHCAWL TOWN CENTRE HEALTH CHECK 2004

4.1 INTRODUCTION

4.1.1 The Porthcawl Town Centre Health Check assess the overall performance of Porthcawl town centre against the relevant indicators set out in TAN 4 (Wales). There have been two previous Town Centre Health Checks carried out in Porthcawl by the County Borough Council, the base line study being 2002. The comparative basis of the previous studies has been limited but now the scope exists for comparison and measurement of change in the overall health of the town. It is not, however, possible to produce a very detailed analysis for Porthcawl as for larger towns/cities such as Bridgend or Cardiff, as vitality and viability data such as rental values and capital yield are not as readily available.

4.1.2 As detailed in the 2003 Town Centre Heath Check, 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). Although there has been no further surveys of users of the town centre, which featured extensively in last year's report, the original survey is still proving valuable information and continues to feature in this study.

4.1.3 The seaside resort of Porthcawl is located within 5 miles of junction 37 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 15,800 (2001 Census).

4.1.4 Porthcawl`s retail area is concentrated along the pedestrianised John Street, which is set on a north-south axis leading to the seafront. 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, it is recognised that the lack of a major store to attract shoppers and anchor the town centre as a whole has led to expenditure leakage to other centres such as Bridgend.

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 Porthcawl Regeneration Strategy is an attempt to redress such decline by proposing to deliver a modern regeneration 'package'.

4.2.2 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.

Figure 9: Aerial view of regeneration area.
Source: Bridgend CBC

4.2.3 Since the 2003 Health Check, the development framework for the Porthcawl Regeneration Area, has been adopted as Supplementary Planning Guidance (SPG) to the Bridgend Unitary Development Plan by the Council at its Planning and Development Committee held on the 2nd of December 2004. The SPG document will be afforded ‘substantial weight’ in future planning decisions of the Local Planning Authority, the National Assembly and Inquiry Inspectors.

4.2.4 The adopted 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;
- Provide for the safe and easy movement of people and goods to and within the town by foot, cycle and motor vehicles, while minimising the environmental impact of vehicular movements.

4.2.5 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 It has not been possible to update the Retail Floorspace Rents for Porthcawl, therefore the statistics from 2003 will be used for comparison. In this respect, 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 As with retail rents, there is very limited information available on office rents. Due to the lack of new rental evidence 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.

4.4.1 Table 4 below, shows the results of the 2004 Retail survey for Porthcawl Town Centre along with the results from the 2002 and 2003 studies for comparison purposes. It indicates that Service Sector outlets continue to dominate the Town Centre as in 2002 and 2003. In terms of Comparison and Convenience goods this has remained static, with 28% of all units classed as comparison outlets, where as, only 5% of all units classed as convenience outlets, in 2004.

4.4.2 Over the same period there has been a increase in the number of service sector outlets from 87 in 2003 to 90 in 2004. The service sector continues to play an important role within Porthcawl with 34% of all the units attributed to this sector. It should be noted that this is 7% higher than comparison outlets. A possible explanation for the high percentage of service outlets and in particular A3 outlets in Porthcawl (which accounts for greatest proportion of all service outlets – 31%) is that it reflects the tourist nature of the town.

PORTHCAWL	2002	2003	2004
Convenience Goods			
Bakers & Confectioners	3	3	3
Butchers & Poulters	2	2	2
Grocery	5	5	5
Off licences / Confectioners / Tobacconists / Newsagents	2	3	3
Total	**12**	**13**	**13**
Comparison Goods			
Footwear and Repair	4	4	4
Men's and Boys Wear	0	0	0
Women's, Girls, Children and General Wear	16	14	14
Furniture, carpets & textiles	7	8	7
Booksellers, arts, crafts, stationers, copy bureaux	8	8	8
Electrical, gas, music & photographic	6	8	7
DIY, hardware & housewares	3	2	2
China, glass, fancy & leather goods	1	1	3
Cars, motorcycles & motor accessories	1	1	1
Chemists, drug stores & opticians	7	7	7
Variety, department & catalogue	4	4	4
Florists, nurserymen & seedsmen	0	0	0
Toys, hobby, cycle & sports	3	4	4
Jewellers & repair	4	4	3
Other	9	9	10
Total	**73**	**74**	**74**
Service			
Restaurants, coffee bars, fast food & takeaways	17	20	21
Pub / Club	7	7	7
Hairdressers, beauty parlours & health centres	10	7	8
Laundries and Dry Cleaners	2	2	2
Travel Agents	5	4	4
Banks, Building Societies and Financial Services	7	7	8
Estate Agents and Valuers	6	6	6
Professional Services	8	8	7
Other	30	26	27
Total	**92**	**87**	**90**
TOTAL	**177**	**174**	**177**
VACANT UNITS	**12**	**14**	**13**
VACANT UNITS (% OF TOTAL)	**4.50%**	**5.28%**	**4.89%**
TOTAL OTHER PROPERTIES	**78**	**77**	**76**
TOTAL PROPERTIES SURVEYED	**267**	**265**	**266**
Source: Bridgend CBC			

Table 4

4.4.3 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.

4.4.4 From 2003 to 2004 the number of vacant outlets in Porthcawl decreased from 14 to 13 outlets. The vacant properties account for only 4.89% of all properties surveyed in 2004 which is well below the national average of 10.6%. The continuing low vacancy levels suggest that Porthcawl is able to attract and retain independent retailers. Vacancy levels are an important indicator of vitality and viability, but should be used with care, as vacancies can arise in the strongest towns.

4.4.5 Table 5 illustrates that just under half of all properties surveyed in 2004 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	48.50%
Between 1,000 and 2,499 sq. ft.	108	40.60%
Between 2,500 and 4,999 sq. ft.	19	7.14%
Between 5,000 and 9,999 sq. ft.	8	3.01%
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	**266**	**100%**

Table 5

4.4.6 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.

4.4.7 As stated above, the Bridgend Unitary Development Plan and the Porthcawl Regeneration Framework has allocated a site for a large-scale convenience retailer to help anchor the town centre. In addition, there are further retail units being developed as part of the Esplanade residential development which are within the established commercial centre, within walking distance of John Street, occupying a prime seafront location. Both these developments will add to and complement the current retail offer within the town centre.

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

Comparison Goods:		**Convenience Goods:**
Birthdays	Stead&Simpson	Greggs
Boots	Superdrug	Somerfield
Clarks	Seconds Ahead	Spar
New Look	Bon Marché	Sweetmans
Peacocks	Woolworths	Victoria Wine

4.4.9 The above list is rather limited and serves only 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.

4.4.10 Porthcawl town centre serves as a tourist destination and contains a mix of uses appropriate to a small coastal town. 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 museum. The Grand Pavilion, which is located on the edge of the town centre, also provides a range of functions for tourists and local residents, including conferences, weddings and fayres, as well as comedy, variety, theatre and musical performances.

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 A 4106 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.

4.6 Accessibility

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 Cymru (South Wales) and Shamrock Travel Services, with Stagecoach providing the Aberdare service.

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 Porthcawl lacks direct rail links, which may act as a significant drawback for visitors to the town. The nearest principal station to the town is at Bridgend, which is situated on the main Swansea-Paddington line. There is a bus shuttle link to and from this station. Pyle Station has allowed a more direct rail link to Porthcawl.

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 6 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
TOTAL	2590

Table 6
Source: Bridgend CBC

4.6.7 Currently, there are 2,590 off-street car park spaces in Porthcawl town centre and an additional 1,800 spaces at the Rest Bay car park (part of which is open on a seasonal basis) and 320 spaces at Mackworth Road. Of the off-street car parks, John Street, Hillsboro Place and the Somerfield (roof top) car park serve the shopping centre. The remaining car parks, Salt Lake, Mackworth Road and Rest Bay 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. The Esplanade and Eastern Promenade provide an additional 150 on street car parking spaces, which 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 Since the 2003 Health Check, there have been no other surveys of users of the town centre than the Research and Marketing report, which featured extensively in last year's report.

4.7.2 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>

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

<u>Where people came from:</u>

Home: 92.8%; Work: 4.3%.

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

18 minutes.

<u>Frequency of visits</u>

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%.

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

Non-food: £10.88; Food: £10.01.

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

94 minutes (just over 1 hour 30 minutes).

<u>What people most like about the town centre</u>
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%.

<u>What people most dislike about the town centre</u>
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

4.8.1 The environmental quality of Porthcawl town centre appears to be of a reasonably high standard. John Street has undergone pedestrianisation and has been enriched by works of art and some attractive and distinctive shop fronts. Porthcawl also has an attractive promenade linking through to the town, providing panoramic sea views, which attract a high number of visitors in the summer season, and at weekends.

4.8.2 Environmental quality in terms of ‘street-scape’ is especially good in John Street which has undergone public realm improvements. 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.

4.8.3 From a visual inspection there appears to be very little clutter, litter and graffiti in the town centre. It is noted that there is poor provision for greenery within the town centre, especially within the pedestrianised portion of John Street, see photograph below.

Figure 10.1: View of John Street
Source: Bridgend CBC

Figure 10.2: Example of Public Art

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

4.9 Perception of Safety / Occurrence of Crime

4.9.1 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 been increased by the installation of CCTV cameras at key points, which include the council car parks. The following car parks have 24 hour CCTV coverage 365 days a year:
.

John Street
Hillsboro Place – North
Hillsboro Place – South

4.9.3 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.

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 in 2003. Figures for secondary retail rents were unavailable at the time of the study.
- There is a similar lack of conclusive information for the past year for Office rents in Porthcawl but from that available it appears that they are higher than those in other comparable centres within the County Borough i.e. Maesteg.
- The Service Sector continues to dominate the Town Centre in 2004 with an increase in the number of units.
- The vacancy rate in Porthcawl continues to remain low at 4.89%, 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 most 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 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 2004

5.1 INTRODUCTION

5.1.1 There have been two previous Town Centre Health Checks carried out in Maesteg by the County Borough Council, the base line study being 2002. The comparative basis of the previous studies has been limited but now the scope exists for comparison and measurement of change in the overall health of the town. It is not, however, possible to produce a very detailed analysis for Maesteg as for larger towns/cities such as Bridgend or Cardiff, as vitality and viability data such as rental values and capital yield are not as readily available.

5.1.2 Maesteg is located in the Llynfi Valley about 9.3 miles to the north of Bridgend town. Although it is a relatively small town it remains the main shopping centre for the entire surrounding valley. Over time Maesteg has become subject to industrial decline, leading to population loss but it still remains as an important source of economic and cultural activity

5.1.3 Transport links are reasonably good, as it is approximately 7.8 miles from junction 36 of the M4. There are direct trains to Bridgend with connections to the main Swansea – London line, and to Cardiff with nationwide connections.

5.1.4 Maesteg's appearance can best be described as an Edwardian Industrial Town, terraced rows of multi-storey buildings of mixed use, consisting of shops on the lower floor and both residential accommodation and office uses on the upper storeys. The commercial core is compact and is centred on two main streets Commercial Street and Talbot Street.

5.1.5 The 2003 Maesteg health check concluded that the town has a good mix of convenience / comparison and service sector uses. Vacancy rates had decreased compared to the previous year 2002, however they were still above the national average. The environmental quality was seen as being 'fairly poor', however, the town centre was set to be enhanced by a series of regeneration phases that would increase the attractiveness of the centre.

5.2 PROPERTY MARKET INDICATORS

5.2.1 A good indication of how in demand Maesteg is for retail space is to compare retail rental values over a given time period with other main retail centres.

5.2.2 Zone A prime rents for Maesteg compared to other are shown in table 7**.**

	£ sq ft (2003)	£ sq ft (2004)	Change (%)
Maesteg	25	-	
Bridgend	60	65	8.3%
Porthcawl	28	-	
Neath	70	70	0%
Port Talbot	45	45	0%
Pontypridd	55	60	9%
Merthyr Tydfil	65	65	0%
Cardiff	250	265	6%
Swansea	155	160	3.2%

Table 7 Primary Retail Rents

Source: Colliers CRE & Cooke and Arkwright

5.2.3 It has not been possible to update the rental values for Maesteg or Porthcawl for 2004 so the statistics from 2003 have to be used for any comparison. Table 7 shows that Maesteg has the lowest primary retail rents in comparison with the other centres. The data for 2003 suggests that the average prime retail value for Maesteg stands at £25 per sq. ft, indicating a low demand for retail space by retailers and investors. This reflects Maesteg's lower role in the retail heirachy compared to other bigger centres such as Bridgend or the prime centres such as Cardiff and Swansea.

5.2.4 Maesteg functions as an important town centre for the Llynfi Valley and surrounding areas, providing a range of residential, retail, service and community facilities. It does not, however, attract retailers in the growth areas of young fashion, multi-media and lifestyle comparison products. These types of retailers normally seek town centres with larger catchment areas. This has the effect of depressing rental values and highlights Maesteg's secondary role as a comparison goods centre.

5.2.5 In terms of office rents in Maesteg, there is similarly limited information available to enable comparisons to be made. The most up-to-date figures are for 2002, which stand at £5 per sq. ft. (Secondary) and £8 per sq. ft. (Prime).

5.3 DIVERSITY OF USES

5.3.1 The information in table 8 compares the retail land use surveys of the Maesteg commercial area undertaken in 2002, 2003 and 2004.

	No. of Units (2002)	No. of Units (2003)	No. of Units (2004)	%(2002)	%(2003)	% (2004)	GB Average %
Convenience	10	10	10	6.06	6.06	6.06	9.30
Comparison	59	56	58	35.76	33.94	35.15	48.12
Services	55	63	63	33.33	38.18	38.18	30.61
Vacant	24	20	18	14.54	12.12	10.58	10.60

Table 8 Diversity of Uses

Sources: Bridgend County Borough Council and Goad Town Centre Reports

5.3.2 Table 8 indicates that in 2004, service goods accounted, as in 2003, for the highest number of outlets within Maesteg Town Centre, whereas comparison goods outlets were the greatest in 2002. This is reflective of many British towns and cities which have also seen growth in the service sector. It is evident that there is a growing demand for professional and financial services which is possibly due to a wider catchment area developing for these uses.

5.3.3 The number of convenience goods outlets within Maesteg has remained unchanged between 2002 to 2004 at 10 units, but the town centre has fewer convenience goods outlets when compared with the national average. 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. An application was submitted in May 2004 to develop a large foodstore with associated parking and an access road on land adjacent to Maesteg Rugby Club, Lynfi Road Maesteg. The proposed foodstore will reinforce and complement the existing food retail offer of Maesteg town centre.

5.3.4 From 2002 to 2004 the number of vacant properties in Maesteg has decreased from 24 to 18 units. This is a very promising trend as vacancy levels are an important indicator of vitality and viability. Whilst, care should be taken when interpreting this data (as vacancies can occur in the largest and strongest of towns) this is the second year in succession where vacancy rates have fallen and they are now more comparable with the national average. Much of the vacant floorspace is located in the non-primary frontage areas of Commercial Street where there are several properties in poor physical condition. Several grant schemes, including the Townscape Heritage Initiative and Town Improvement Grants are available for owners of premises who wish to sensitively improve the appearance of the buildings, which introduces increased scope for buildings to brought back into beneficial use and thus for vacancy rates to fall further.

5.3.5 In addition to comparison, convenience and service uses there are also many uses of a non-retail nature which include commercial offices, 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)	Floorspace Sq Ft (2004)	% (2002)	% (2003)	% (2004)	National Average (%)
Convenience	34,100	24,832	24,874	13.25	9.75	9.65	16.70
Comparison	91,149	87,363	90,740	35.41	34.23	35.25	57.96
Services	85,885	91,386	91,967	33.36	35.87	35.73	20.54
Total	**211.134**	**203.581**	**207,581**				

Table 9 Diversity of Uses (floorspace)

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

5.3.6 Convenience / comparison / services outlets account for a total of 131 properties and cover an area of 207,581 sq. ft. This is considerably smaller than Bridgend which has a total floorspace area of approximately 600,000 sq. ft. This is to be expected given Maesteg’s position in the retail hierarchy; a more realistic comparison would be with Porthcawl which has approximately 280,000 sq ft of commercial floorspace.

5.3.7 Maesteg has experienced significant growth in the amount of comparison floorspace from 2003 to 2004. However, the proportion of comparison goods floorspace in Maesteg is just 35%, much lower than the national average. This clearly shows an under-representation of comparison shopping and when individual sectors are examined (see section 6) it is evident that footwear and menswear premises are unrepresented. Maesteg lacks a large department or variety store to secure its appeal as a main centre for comparison shopping. There is also an absence of other key attractors and large multiple retailers. This clearly reduces Maesteg's attraction and its ability to retain expenditure and expand its catchment area.

5.3.8 The loss of the large convenience goods store on Llynfi Road led to a major fall in convenience floorspace during 2003, however it is pleasing to note that this situation has stabilised and, indeed, the town slightly increased it's amount of convenience floorspace during 2004.

5.3.9 Table 9 also illustrates that from 2002 to 2004 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 21%. This trend is fundamentally linked to the overall growth in the total number of service goods outlets over this period mentioned previously.

5.3.10 Table 10 below illustrates the distribution of outlets by size within Maesteg Town Centre:

Under 1,000 sq. ft.	77	46.67%
Between 1,000 and 2,499 sq. ft.	63	38.18%
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 10 Outlet Size Distribution

Source: Bridgend BCBC

5.3.11 Almost half of all properties surveyed in 2004 are below 1,000 sq. ft. This suggests that Maesteg like Porthcawl and indeed Bridgend, does well in encouraging small independent retailers serving local needs. The shape and size of units on Commercial Street and Talbot Street, however, restricts major retailers from locating there, as they need large store formats. This situation could change if there was any re-development of the town centre as several existing units could be combined forming larger single units.

Maesteg Market

5.3.12 The market plays an important role in the life of the town and in the diversification of the retail facilities on offer. The results for the Maesteg Market survey have been gathered from stalls located both within the indoor and outdoor market.

5.3.13 Table 11 shows the contribution that the market stalls make to the service, convenience and comparison goods on offer in the town centre. The market provides for 10 additional convenience units, 16 comparison units and 1 service unit which have not been accounted for in either the County Borough's Annual Retail Survey nor through commercially provided data.

MAESTEG MARKET	**No. of Units**
Convenience	
Bakers and Confectioners	3
Butchers, Poulterers and Fishmongers	5
Grocery	1
Off Licences/Confectioners/Tobacconists/Newsagents	1
Total	**10**
Comparison	
Women's, Girls, Children and general wear	2
Booksellers, arts, crafts, stationers, copy bureaux	2
Electrical, gas, music & photography	1
Florists, nurserymen and Seedsmen	1
DIY, hardware & housewares	2
Jewellers and Repair	3
Toy, hobby, cycle and sport	1
Furniture, carpets & textiles	2
Variety	2
Total	**16**
Service	
Restaurants, coffee bars, fast food and takeaways	1
Hairdressers, Beauty Parlours and Health centres	1
Other	1
Total	**3**

Table 11 Retail Provision in Maesteg Market
Source: Bridgend CBC

5.4 RETAILER REPRESENTATION

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

Comparison Goods:	**Convenience Goods:**
Woolworths	Somerfield
Shoefayre	Aldi
Argos	Iceland
New Look	Ferrari's
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 Somerfield, Aldi and Iceland stores. However, as mentioned previously the town has lost its second Somerfield store located just off Llynfi Road as a result of fire damage. This vacant site a commercial opportunity, particularly to a multiple retailer, due to the size of the property.

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
Thompson (formerly Lunn Polly)
Principality

5.4.4 Overall, Maesteg offers a relatively diverse range of retail facilities, with Maesteg market playing an important role in the life and diversity of the town. 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 the town serves only local needs of the incidental food and non-food shopper. As mentioned above, the town lacks a major store to attract shoppers and to anchor the town centre as a whole. However, this situation will improve with the development of the new supermarket adjacent to the RFC ground as mentioned previously.

5.5 Accessibility

5.5.1 Both the bus and railway stations are located within the commercial area. The principal bus routes from Maesteg access all areas of the surrounding Llynfi Valley including 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, but this is being addressed as part of the regeneration programme. There are however many residential properties within and adjoining the commercial area, and consequently there is an extensive catchment area within walking distance. 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 allocated significant resources to improve this car park, including: re-painting, new lighting, new surfaces and the installation of CCTV cameras to increase safety.

5.5.3 The town is an important local transport hub catering for both the town and the surrounding hinterland. There is a certain degree of congestion in and around the core shopping area which adversely affects the physical environment. There is little segregation of pedestrian and vehicular traffic which affects the shopping experience. However, this problem is at present being tackled as part of a wider regeneration programme which will be discussed later in this report. There is little integration between the rail and bus stations.

5.6 PEDESTRIAN FLOWS

Point	10.00 – 11.00	11.00- 12.00	12.00- 13.00	13.00- 14.00	14.00- 15.00	15.00- 16.00	Total (1)	Average (3)
North Talbot St	474	576	408	456	324	246	2484	414.00
South Talbot St	522	504	444	522	354	282	2628	438.00
West Commercial St	576	528	564	360	294	222	2544	424.00
East Commercial St	528	462	456	498	324	288	2556	426.00
Total (2)	2100	2070	1872	1836	1296	1038	10212 5	1702.00 6
Average (4)	525.00	517.50	468.00	459.00	324.00	259.50	2553.00 7	425.50 8

Table 12

Footnotes:

1. Total observations per point for all day
2. Total observations for hour over all points
3. Average hourly rate per point per day
4. Average hourly rate for stated hour
5. Overall total observations for day
6. Overall average per point
7. Overall average per point per hour

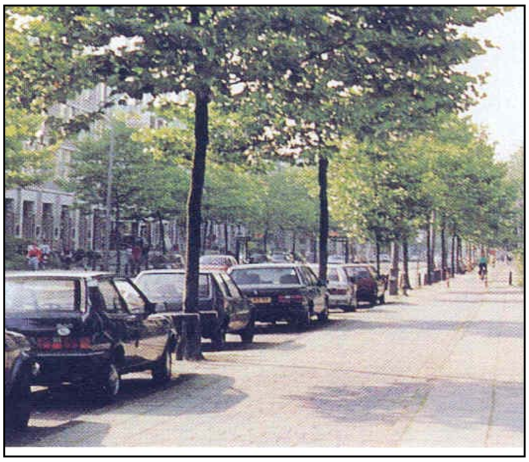
5.6.1 There had been no detailed recent pedestrian flow count surveys undertaken for Maesteg until 2004 but previous observations indicated a relatively strong pedestrian flow within the retail core on Talbot Street where the multiples are located. However, Research and Marketing Ltd were commissioned to undertake a pedestrian survey in March 2004. From table 12 it can be seen that the highest pedestrian count is in the west of Commercial Street where Woolworth's, Spar and the Job Centre and are located. The busiest times for all locations in Maesteg is between 11:00 and 13:00. North Talbot Street and west Commercial Street in particular have high pedestrian foot counts around lunchtime. This is because there are many food places in these areas and a popular retail attraction, the market, is located at the north end of Talbot Street.

5.7 ENVIRONMENTAL QUALITY

5.7.1 Maesteg is currently in the early stages of a regeneration programme designed to enhance its physical appearance and townscape. The first phase of the town centre's regeneration started in summer of 2004, and was funded by the Welsh Assembly Government, the WDA the Councils Strategic Regeneration Fund. Projects planned for the commercial area include:

- The planting of trees along both sides of Commercial street which is unique in valley towns
- The framing of historic buildings
- The introduction of furnished pedestrian areas with improved signage
- Improved Lighting
- Improved access for buses and cyclists. Bicycle racks will be installed to encourage more cycle users into the town

- Introduction of clearly defined parking bays to combat existing problems of illegal parking within the town and to break up the continuous streams of parked traffic.
- Creation of new pedestrian crossings



Figures 11 & 12:Commercial Street 2004 **A greener image is planned by 2006**
Source: Bridgend CBC

5.7.2 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.

5.7.3 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.

Maesteg Matters

Materion Maesteg

5.7.4 Funding has been approved for a second phase of improvements to be implemented during the next three years. The second phase includes improvements to Talbot Street by pavement widening, new street furniture and lighting; the replacement of the footbridge across the Llynfi River to the public car park and improvements to the lane linking Talbot Street and Plasnewydd Street.

5.7.5 The second phase of improvements will also focus on enhancement of the setting of several listed buildings on Talbot Street by creating a new public square in front of the Town Hall. The existing monument will be restored and become the focus of the new public space. These improvements will complement existing major restoration works currently underway at the town hall.

Figures 13 & 14 **Front of Town Hall** **Side of Town Hall and bus station**
Source: Bridgend CBC

5.7.6 A key objective of the second phase of works is improving the attractiveness and accessibility of the town by enhancing a main pedestrian thoroughfare from the car park to Talbot Street. The opportunity will also be taken to exploit the attractiveness of the river by including soft landscaping to the banks. Later phases will include improvements to the market, bus station and other stretches of the River Llynfi.

5.7.7 Within the commercial core economic decline has also led to a spiral of reduced expenditure in the repair and maintenance of building fabrics. This has contributed to the deterioration in the built environment and an untidy visual appearance. 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 funding from the Heritage Lottery Fund. Many buildings are being improved but look poor at present because of the amount of scaffolding covering them and the disruption associated with this improvement work.

Figures 15 & 16: Building Improvement Works **Improved Shop Fronts**
Source: Bridgend CBC

5.7.8 Partnership working is critical to the success of the overall regeneration programme and the following arrangements are already in place:

- Regular meetings of the Maesteg Town Centre Regeneration Operational Group. Under new management arrangements a wider Town Centre Regeneration Forum has recently been established and the Operational Group is replaced by an Officer Working Group.
- The Council works closely working with funding agencies and a secured commitment from the Welsh Development Agency, Welsh Assembly Government and Cadw.
- Townscape Heritage Lottery 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.
- Over £600,000 has already been allocated for town centre building improvements.

5.8 CUSTOMER VIEWS AND BEHAVIOUR

5.8.1 For the 2003 Maesteg Health Check the County Borough Council commissioned a research consultancy to undertake a town centre perception survey, consisting of telephone and on-street interviews. Unfortunately there has been no similar survey carried that could inform the 2004 Maesteg Health Check. To give an idea of customer views and behaviour, below are a few selected questions and their respective results from the 2003 Maesteg Health Check.

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%;

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 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

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, however, benefited for a number of years from the installation of CCTV cameras at key points within the town and surrounding car parks. This has greatly improved security and feeling of safety within the town and also reduced car park related crime. 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 Plans to install modern, bright vandal proof lights will contribute to improving the town's image and perception of safety.

5.10. CONCLUSIONS

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

- Maesteg experienced a positive increase in prime retail rents of 8.7% in the 2003 Maesteg health check. Figures for 2004 and secondary retail rents were unavailable at the time of this study.
- Over the past year, there has been a slight increase in comparison goods outlets (from 33% - 35%), whilst convenience goods outlets and the service sector have remained static over this period.
- For the second year in a row vacancy rates have decreased. In 2004 the rate was 10.58%, comparable with the national average.
- The majority of premises in Maesteg town centre (46.67%) 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. Although the situation could change if the proposal for the new supermarket goes ahead at the land adjacent to the RFC ground.
- The town is widely accessible by all forms of transport with good motor links to the M4 and surrounding Llynfi Valley and good rail links to Bridgend, Cardiff and connections nationwide.

- Pedestrian flows show that Maesteg's peak time is between 11:00 and 13:00 and west Commercial street is the most frequently visited area.

5.10.2 The assessment of Maesteg Town Centre for 2004 has illustrated some evident signs of increased levels of vitality and viability over the past 2 years. This is reflected in the further decrease in vacancy levels and an encouraging rise in comparison outlet floorspace. However, Maesteg is still attaining much lower investment than other comparable centres in South Wales.

5.10.3 Maesteg shopping centre plays an important role within the community and the surrounding valleys. Local food top-up shopping is the main usage but the service sector and non-food stores are also increasing. Maesteg is quite restricted in the size of stores that can currently locate there. The development of a new supermarket on the site adjacent to the rugby ground should significantly add to the centre's vitality and viability and thus act as an 'anchor store' and as a key attractor within the town.

5.10.4 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 nearly complete and the second phase about to commence. The improvements should lead to increased consumer satisfaction with the environmental quality in Maesteg, which was a key concern in the 2003 consumer survey. With the improved lighting, pavements and CCTV, pedestrians will feel safer from vehicular and other dangers. The overall appearance and perception of Maesteg will be significantly enhanced.

6.1 INTRODUCTION

6.1.1 As outlined in section 1, for the third successive year, the Council has undertaken its own survey into the uses of all of the smaller Established Commercial Centres within the County Borough. In 2004, the survey has been undertaken in October (previously it has been December), this has been changed so that this data can be more readily be compared with other published data for the year. It is envisaged that the date of the survey will be gradually be brought forward year-on-year until the data is collectable in the summer.

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 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 October 2004 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 - 2004	No. of Units	Area (sq. ft.
Total Properties Surveyed:	466	882,296
Total Service / Convenience / Comparison / Vacant	380	752,139
Total Other (includes Residential Properties & Community Facilities etc.)	86	130,157
Total Vacant	58	103,753
% Vacant	12.45%	11.76%
Total Convenience	13	39,417
% Convenience	2.79%	4.47%
Total Comparison	145	304,436
% Comparison	31.12%	34.50%
Total Service	164	304,533
% Service	35.19%	34.52%
Convenience Goods		
Bakers and Confectioners	5	4,747
Butchers & Poulters	1	463
Grocery	5	32,765
Off licences / Confectioners / Tobacconists / Newsagents	2	1,442
Total	**13**	**39,417**
Comparison Goods		
Footwear and Repair	5	7,352
Mens and Boys Wear	4	5,210
Womens, Girls, Children and General Wear	27	57,242
Furniture, carpets & textiles	13	20,398
Booksellers, arts, crafts, stationers, copy bureaux	11	16,469
Electrical, gas, music & photographic	21	25,112
DIY, hardware & housewares	4	4,994
China, glass, fancy & leather goods	5	2,939
Cars, motorcycles & motor accessories	1	1,615
Chemists, drug stores & opticians	14	28,255
Variety, department & catalogue	7	69,847
Florists, nurserymen & seedsmen	2	2,454
Toys, hobby, cycle & sports	10	14,122
Jewellers & repair	7	4,855
Other	14	43,572
Total	**145**	**304,436**
Service		
Restaurants, coffee bars, fast food & takeaways	38	48,944
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	25	39,923
Estate Agents and Valuers	11	12,002
Professional Services	16	20,817
Other	26	94,809
Total	**164**	**304,533**
Distribution of Outlets by Size		
Under 1,000 sq ft.	222	47.64%
Between 1,000 and 2,499 sq. ft.	159	34.12%
Between 2,500 and 4,999 sq. ft.	50	10.73%
Between 5,000 and 9,999 sq. ft.	22	4.72%
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	**466**	**100.00%**

PORTHCAWL - 2004	No. of Units	Area (sq. ft.)
Total Properties Surveyed:	266	401,085
Total Service / Convenience / Comparison / Vacant	190	307,514
Total Other (includes Residential Properties & Community Facilities etc.)	76	93,571
Total Vacant	13	25,037
% Vacant	4.89%	6.24%
Total Convenience	13	37,318
% Convenience	4.89%	9.30%
Total Comparison	74	101,041
% Comparison	27.82%	25.19%
Total Service	90	144,118
% Service	33.83%	35.93%
Convenience Goods		
Bakers and Confectioners	3	3,122
Butchers & Poulters	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	7	10,721
Booksellers, arts, crafts, stationers, copy bureaux	8	7,481
Electrical, gas, music & photographic	7	5,834
DIY, hardware & housewares	2	2,669
China, glass, fancy & leather goods	3	1,755
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	3	4,058
Other	10	10,409
Total	**74**	**101,041**
Service		
Restaurants, coffee bars, fast food & takeaways	21	28,869
Pub / Club	7	17,373
Hairdressers, beauty parlours & health centres	8	5,705
Laundries and Dry Cleaners	2	1,970
Travel Agents	4	5,371
Banks, Building Societies and Financial Services	8	11,657
Estate Agents and Valuers	6	4,693
Professional Services	7	7,061
Other (inlcuding Guest Houses, Hotels etc.)	27	61,419
Total	**90**	**144,118**
Distribution of Outlets by Size		
Under 1,000 sq ft.	129	48.50%
Between 1,000 and 2,499 sq. ft.	108	40.60%
Between 2,500 and 4,999 sq. ft.	19	7.14%
Between 5,000 and 9,999 sq. ft.	8	3.01%
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	**266**	**100.00%**

MAESTEG - 2004	No. of Units	Area (sq. ft.)
Total Properties Surveyed:	165	257,430
Total Service / Convenience / Comparison / Vacant	149	234,772
Total Other (includes Residential Properties & Community Facilities etc.)	16	22,658
Total Vacant	18	27,233
% Vacant	10.91%	10.58%
Total Convenience	10	24,832
% Convenience	6.06%	9.65%
Total Comparison	58	90,740
% Comparison	35.15%	35.25%
Total Service	63	91,967
% Service	38.18%	35.73%
Convenience Goods		
Bakers and Confectioners	3	2,874
Butchers & Poulters	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	14,015
Furniture, carpets & textiles	4	5,576
Booksellers, arts, crafts, stationers, copy bureaux	2	2,357
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	6	6,620
Jewellers & repair	1	431
Other	5	10,107
Total	**58**	**90,740**
Service		
Restaurants, coffee bars, fast food & takeaways	16	17,545
Pub / Club	8	21,668
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	5	4,672
Professional Services	5	5,769
Other	10	17,481
Total	**63**	**91,967**
Distribution of Outlets by Size		
Under 1,000 sq ft.	77	46.67%
Between 1,000 and 2,499 sq. ft.	63	38.18%
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 - 2004	No. of Units	Area (sq. ft.)
Total Properties Surveyed:	86	103,549
Total Service / Convenience / Comparison / Vacant	46	68,975
Total Other (includes Residential Properties & Community Facilities etc.)	40	34,574
Total Vacant	1	194
% Vacant	1.16%	0.19%
Total Convenience	5	6,168
% Convenience	5.81%	5.96%
Total Comparison	17	23,390
% Comparison	19.77%	22.59%
Total Service	23	39,224
% Service	26.74%	37.88%
Convenience Goods		
Bakers and Confectioners	0	0
Butchers & Poulters	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	4	5,845
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	2	1,981
DIY, hardware & housewares	2	4,209
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	5,899
Jewellers & repair	0	0
Other	1	1,690
Total	**17**	**23,390**
Service		
Restaurants, coffee bars, fast food & takeaways	8	16,706
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	4	3,864
Total	**23**	**39,224**
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%**

BLAENGARW - 2004	No. of Units	Area (sq. ft.)
Total Properties Surveyed:	32	35,327
Total Service / Convenience / Comparison / Vacant	13	16,975
Total Other (includes Residential Properties & Community Facilities etc.)	19	18,352
Total Vacant	8	6,028
% Vacant	25.00%	17.06%
Total Convenience	1	1,206
% Convenience	3.13%	3.41%
Total Comparison	1	840
% Comparison	3.13%	2.38%
Total Service	3	8,902
% Service	9.38%	25.20%
Convenience Goods		
Bakers and Confectioners	0	0
Butchers & Poulters	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	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	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	**1**	**840**
Service		
Restaurants, coffee bars, fast food & takeaways	1	678
Pub / Club	2	8,224
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	**3**	**8,902**
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%**

BRACKLA - 2004	No. of Units	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 and Confectioners	1	1,066
Butchers & Poulters	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%**

CAERAU - 2004	No. of Units	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	3	3,907
% Vacant	5.56%	8.00%
Total Convenience	2	2,863
% Convenience	3.70%	5.86%
Total Comparison	4	3,563
% Comparison	7.41%	7.30%
Total Service	10	12,583
% Service	18.52%	25.77%
Convenience Goods		
Bakers and Confectioners	0	0
Butchers & Poulters	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**	**3,563**
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	1,485
Other	0	452
Total	**10**	**12,583**
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%**

NANTYFFYLLON - 2004	No. of Units	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 and Confectioners	0	0
Butchers & Poulters	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%**

NANTYMOEL - 2004	**No. of Units**	**Area (sq. ft.)**
Total Properties Surveyed:	124	136,174
Total Service / Convenience / Comparison / Vacant	34	49,213
Total Other (includes Residential Properties & Community Facilities etc.)	90	86,962
Total Vacant	12	19,224
% Vacant	9.68%	14.12%
Total Convenience	6	7,728
% Convenience	4.84%	5.68%
Total Comparison	7	5,479
% Comparison	5.65%	4.02%
Total Service	9	16,781
% Service	7.26%	12.32%
Convenience Goods		
Bakers and Confectioners	1	570
Butchers & Poulters	1	570
Grocery	3	6,092
Off licences / Confectioners / Tobacconists / Newsagents	1	495
Total	**6**	**7,728**
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	1	958
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	3	2,454
Total	**7**	**5,479**
Service		
Restaurants, coffee bars, fast food & takeaways	3	1,475
Pub / Club	3	11,959
Hairdressers, beauty parlours & health centres	2	1,227
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	1	2,120
Total	**9**	**16,781**
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%**

OGMORE VALE - 2004	No. of Units	Area (sq. ft.)
Total Properties Surveyed:	147	137,886
Total Service / Convenience / Comparison / Vacant	41	53,303
Total Other (includes Residential Properties & Community Facilities etc.)	106	84,583
Total Vacant	12	10,721
% Vacant	8.16%	7.78%
Total Convenience	2	1,851
% Convenience	1.36%	1.34%
Total Comparison	8	11,894
% Comparison	5.44%	8.63%
Total Service	19	28,837
% Service	12.93%	20.91%
Convenience Goods		
Bakers and Confectioners	0	0
Butchers & Poulters	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	3	1,916
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	2	2,228
Estate Agents and Valuers	0	0
Professional Services	1	700
Other	4	5,134
Total	**19**	**28,837**
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%**

PENCOED - 2004	No. of Units	Area (sq. ft.)
Total Properties Surveyed:	90	90,783
Total Service / Convenience / Comparison / Vacant	72	69,277
Total Other (includes Residential Properties & Community Facilities etc.)	18	21,506
Total Vacant	5	4,004
% Vacant	5.56%	4.41%
Total Convenience	6	10,613
% Convenience	6.67%	11.69%
Total Comparison	20	14,531
% Comparison	22.22%	16.01%
Total Service	41	40,128
% Service	45.56%	44.20%
Convenience Goods		
Bakers and Confectioners	1	452
Butchers & Poulters	1	323
Grocery	2	7,944
Off licences / Confectioners / Tobacconists / Newsagents	2	1,894
Total	**6**	**10,613**
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	1	1,119
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	2	1,206
Jewellers & repair	0	0
Other	1	840
Total	**20**	**14,531**
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	5	4,973
Estate Agents and Valuers	4	2,336
Professional Services	3	2,088
Other	9	10,549
Total	**41**	**40,128**
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%**

PONTYCYMMER - 2004	No. of Units	Area (sq. ft.)
Total Properties Surveyed:	121	104,259
Total Service / Convenience / Comparison / Vacant	59	66,952
Total Other (includes Residential Properties & Community Facilities etc.)	62	37,308
Total Vacant	15	14,704
% Vacant	12.40%	14.10%
Total Convenience	5	9,096
% Convenience	4.13%	8.72%
Total Comparison	17	15,661
% Comparison	14.05%	15.02%
Total Service	22	27,491
% Service	18.18%	26.37%
Convenience Goods		
Bakers and Confectioners	1	344
Butchers & Poulters	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	1	1,044
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	1	570
Jewellers & repair	0	0
Other	3	2,325
Total	**17**	**15,661**
Service		
Restaurants, coffee bars, fast food & takeaways	5	5,662
Pub / Club	4	11,334
Hairdressers, beauty parlours & health centres	5	2,551
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	4	3,218
Total	**22**	**27,491**
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%**

Pyle / Kenfig Hill - 2004	No. of Units	Area (sq. ft.)
Total Properties Surveyed:	200	230,724
Total Service / Convenience / Comparison / Vacant	69	136,314
Total Other (includes Residential Properties & Community Facilities etc.)	131	94,410
Total Vacant	12	17,373
% Vacant	6.00%	7.53%
Total Convenience	6	56,489
% Convenience	3.00%	24.48%
Total Comparison	26	31,592
% Comparison	13.00%	13.69%
Total Service	25	30,860
% Service	12.50%	13.38%
Convenience Goods		
Bakers and Confectioners	0	0
Butchers & Poulters	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	2	1,464
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	0	0
Toys, hobby, cycle & sports	5	4,338
Jewellers & repair	0	0
Other	2	1,862
Total	**26**	**31,592**
Service		
Restaurants, coffee bars, fast food & takeaways	7	5,834
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	3	8,536
Total	**25**	**30,860**
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%**

BRIDGEND COUNTY BOROUGH - 2004	No. of Units	Area (Sq. ft.)
All Established Commercial Centres		
Total Properties Surveyed:	1848	2,534,395
Total Service / Convenience / Comparison / Vacant	1098	1,824,397
Total Other (includes Residential Properties & Community Facilities etc.)	750	709,998
Total Vacant	161	239,852
% Vacant	8.71%	9.46%
Total Convenience	77	219,778
% Convenience	4.17%	8.67%
Total Comparison	382	609,442
% Comparison	20.67%	24.05%
Total Service	478	755,325
% Service	25.87%	29.80%
Convenience Goods		
Bakers & Confectioners	15	13,175
Butchers & Poulters	10	8,342
Grocery	33	179,930
Off licences / Confectioners / Tobacconists / Newsagents	18	17,416
Total	**76**	**218,863**
Comparison Goods		
Footwear and Repair	15	19,375
Mens and Boys Wear	6	8,256
Womens, Girls, Children and General Wear	62	101,041
Furniture, carpets & textiles	35	52,765
Booksellers, arts, crafts, stationers, copy bureaux	24	27,814
Electrical, gas, music & photographic	45	43,066
DIY, hardware & housewares	16	20,053
China, glass, fancy & leather goods	12	10,850
Cars, motorcycles & motor accessories	4	6,243
Chemists, drug stores & opticians	45	65,025
Variety, department & catalogue	20	123,333
Florists, nurserymen & seedsmen	9	6,092
Toys, hobby, cycle & sports	32	36,059
Jewellers & repair	11	9,343
Other	46	80,127
Total	**382**	**609,442**
Service		
Restaurants, coffee bars, fast food & takeaways	118	145,679
Pub / Club	60	182,696
Hairdressers, beauty parlours & health centres	64	41,516
Laundries and Dry Cleaners	5	7,416
Travel Agents	15	17,265
Banks, Building Societies and Financial Services	59	84,615
Estate Agents and Valuers	29	26,038
Professional Services	39	41,495
Other	89	208,605
Total	**478**	**755,325**
Distribution of Outlets by Size		
Under 1,000 sq ft.	1141	61.74%
Between 1,000 and 2,499 sq. ft.	520	28.14%
Between 2,500 and 4,999 sq. ft.	122	6.60%
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	**1848**	**100.00%**

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

RETAIL PARKS / SUPERMARKETS - 2004	No. of Units	Area (sq. ft.)
Edge/Out of Centre		
Total Properties Surveyed:	23	464,334
Total Service / Convenience / Comparison / Vacant	23	464,334
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	0.00%	0.00%
Convenience Goods		
Bakers & Confectioners	0	0
Butchers & Poulters	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%**

BRIDGEND COUNTY BOROUGH - 2004	No. of Units	Area (Sq. ft.)
Total Properties Surveyed:	1871	2,998,729
Total Service / Convenience / Comparison / Vacant	1121	2,288,731
Total Other (includes Residential Properties & Community Facilities etc.)	750	709,998
Total Vacant	161	239,852
% Vacant	8.61%	8.00%
Total Convenience	83	445,120
% Convenience	4.44%	14.84%
Total Comparison	399	848,434
% Comparison	21.33%	28.29%
Total Service	478	755,325
% Service	25.55%	25.19%
Convenience Goods		
Bakers & Confectioners	15	13,175
Butchers & Poulters	10	8,342
Grocery	39	405,272
Off licences / Confectioners / Tobacconists / Newsagents	18	17,416
Total	**82**	**444,205**
Footwear and Repair	16	29,375
Mens and Boys Wear	6	8,256
Womens, Girls, Children and General Wear	62	101,041
Furniture, carpets & textiles	41	110,782
Booksellers, arts, crafts, stationers, copy bureaux	24	27,814
Electrical, gas, music & photographic	47	63,065
DIY, hardware & housewares	21	145,475
China, glass, fancy & leather goods	12	10,850
Cars, motorcycles & motor accessories	5	16,307
Chemists, drug stores & opticians	45	65,025
Variety, department & catalogue	21	128,823
Florists, nurserymen & seedsmen	9	6,092
Toys, hobby, cycle & sports	33	46,059
Jewellers & repair	11	9,343
Other	46	80,127
Total	**399**	**848,434**
Service		
Restaurants, coffee bars, fast food & takeaways	118	145,679
Pub / Club	60	182,696
Hairdressers, beauty parlours & health centres	64	41,516
Laundries and Dry Cleaners	5	7,416
Travel Agents	15	17,265
Banks, Building Societies and Financial Services	59	84,615
Estate Agents and Valuers	29	26,038
Professional Services	39	41,495
Other	89	208,605
Total	**478**	**755,325**
Distribution of Outlets by Size		
Under 1,000 sq ft.	1141	60.98%
Between 1,000 and 2,499 sq. ft.	520	27.79%
Between 2,500 and 4,999 sq. ft.	122	6.52%
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	**1871**	**100.00%**

Figures do not McArther Glen Designer Outlet Village.

6.2 CONCLUSIONS

6.2.1 The results of the third 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 1.8 million sq ft 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%).

6.2.2 The retail parks and out-of-centre stores continue to perform very well, with a 100% occupancy rate. The retail parks / foodstores account for approximately 20% of all commercial floorspace within the County Borough. The survey this year does not include the ancillary uses to the retail parks, however work is currently being undertaken so that in future years it will be possible to incorporate these (drive-thru's, car garages etc.) as well as those smaller retail/service units which are located outside of the commercial centres. The retail parks / foodstores account for approximately 20% of all commercial floorspace within the County Borough.

6.2.3 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 nearly 3 million square feet of commercial floorspace. Floorspace vacancy rates lie at 8% of total floorspace and 8.61% of commercial floorspace (which is lower than the national average).

6.2.4 This third survey has built upon the previous years studies which will provide 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. For example, the information provided in this study will be used to draft policies in the Bridgend Local Development Plan, preparation of which will commence after the adoption of the Unitary Development Plan.