RETAILING AND COMMERCIAL CENTRES IN BRIDGEND COUNTY BOROUGH

2005

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1. RETAILING IN BRIDGEND COUNTY BOROUGH 2005

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) which was adopted by the Council on the 12th May 2005. To ensure this however, an effective monitoring programme is 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 eighth consecutive year in which a Health Check has been carried out for Bridgend town centre and the forth 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) draw upon a variety of data from different sources to assess against various 'indicators' as suggested by Central Government. Conducted on an annual basis, the quality and attractiveness of all three town centres can be assessed and, where necessary, compared to other centres outside the County Borough, 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 Bridgend Unitary Development Plan (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 1,850 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 the Unitary Development Plan policies when they are evaluated and updated in the new Local Development Plan for Bridgend County Borough, whose preparation was officially begun by the Council on the 7th December 2005. 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 occupiers.

2. 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 regeneration activities), that the vitality, viability and attractiveness of town, district, local and village centres are enhanced. This position was reinforced in 2005, with the publication of a Ministerial Interim Planning Policy Statement (MIPPS) on *Planning for Retailing and Town Centres*. The MIPPS confirmed the Government's commitment to focusing retail, commercial and leisure developments on town and, at an appropriate scale, district centres.

2.1.2 *Planning Policy Wales 2002* (paragraph 10.1.3 as amended by the MIPPS) defines vitality, viability and attractiveness 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, Health Checks have been undertaken since 2002, this year's findings will build on the data from the last three years, where emerging trends in the time-tracked data can become apparent so as to monitor the progress of these smaller town centres.

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.

Figure 1 Suggested Town Centre Indicators

Source: Technical Advice Note (Wales) Number 4: Retailing and Town Centres

3. BRIDGEND TOWN CENTRE HEALTH CHECK 2005

3.1 INTRODUCTION

3.1.1 Last year's Health Check highlighted an up-turn in Bridgend town centre's economic indicators compared to 2003 data with rises in retail rents and a sustained fall in property investment yields. Whilst vacancy rates did rise, this was considered to be a short-term issue which would be resolved once the redevelopment of some of the key town centre redevelopment sites commenced.

3.1.2 The report concluded that 2005 would be an important year for the town: with increased accessibility, new store openings, redevelopment plans coming to fruition and continued success in attracting major public and private investment in the centre. Whilst renewed environmental and pedestrianisation works were envisaged to cause some minor disruption to trading, it had been planned to reduce the effects on adjacent properties. The following outcomes have now been recorded for 2005.

3.2 RETAIL AND OFFICE FLOORSPACE RENTAL VALUES AND INVESTMENT YIELD

Primary Retail Rents

3.2.1 Typical primary retail rental values have risen in Bridgend to £70 per square foot (see Figure 2 overleaf). This is the second successive annual rise in values following a stagnant period which dated back to 1999. This now equals the values in Neath, which has remained the same since 1999. In terms of other comparable centres, Merthyr Tydfil was the only town to see a rise in rental values since 2004; Carmarthen, Pontypridd, Llanelli, Newport and Swansea all remained at their previous year's rate. Cardiff's rental market growth continues apace, however, with a jump of £20 per sq. ft. to £285.

3.2.2 Nationally, UK town centre rental values have risen by 4%. In Wales, this growth has been higher than average at 5.4%, making it one of the top performing regions. Bridgend's rise in values of 7%, although indicative, presents a major economic boost for the town and places it in joint eighth position of the best primary retail rents in Wales.

Secondary Retail Rents

3.2.3 Unavailable in 2004, secondary retail rental values since 2001 have now been obtained from the Valuation Office Agency (VOA), albeit for a more limited number of centres than primary rents. The sourcing of this data is very positive, and will enable solid comparisons year-on-year to be made, whereas previously such information had been unreliable and inconsistent.

3.2.4 The data shows (in figure 3 overleaf) Bridgend town centre achieved a secondary retail rent of approximately £42 per square foot in 2005. Bridgend witnessed secondary rental levels above that of Carmarthen, which, conversely achieved higher primary retail rents than Bridgend this year.

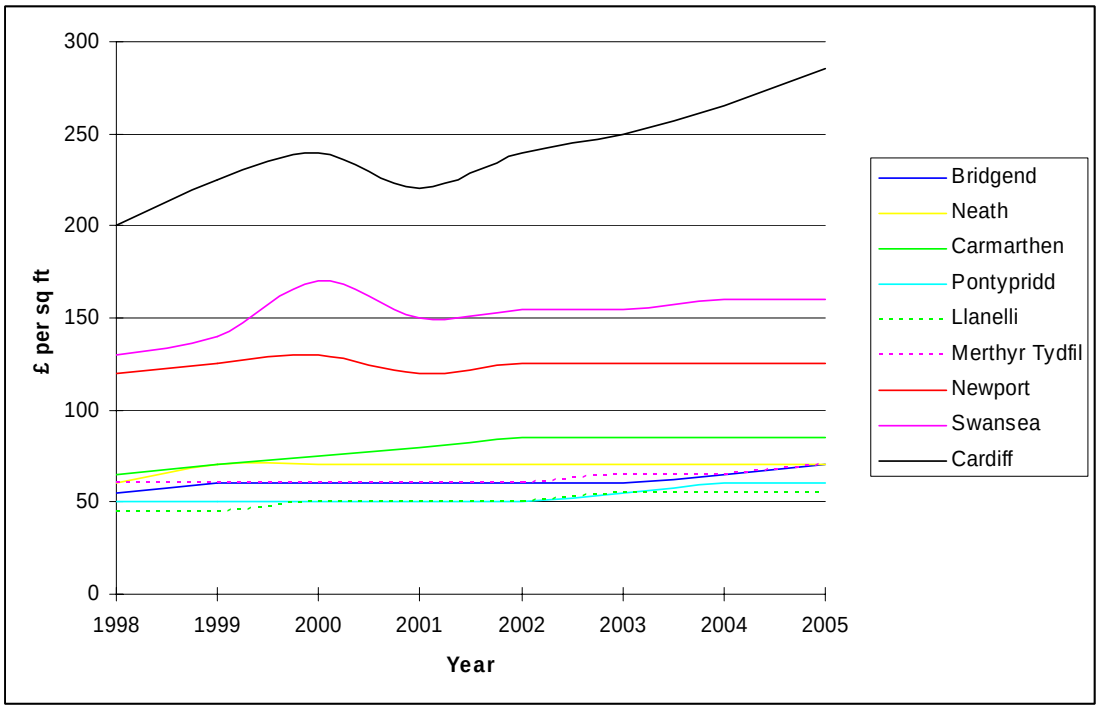


Figure 2 Primary Retail Rental Values

Source: Colliers CRE

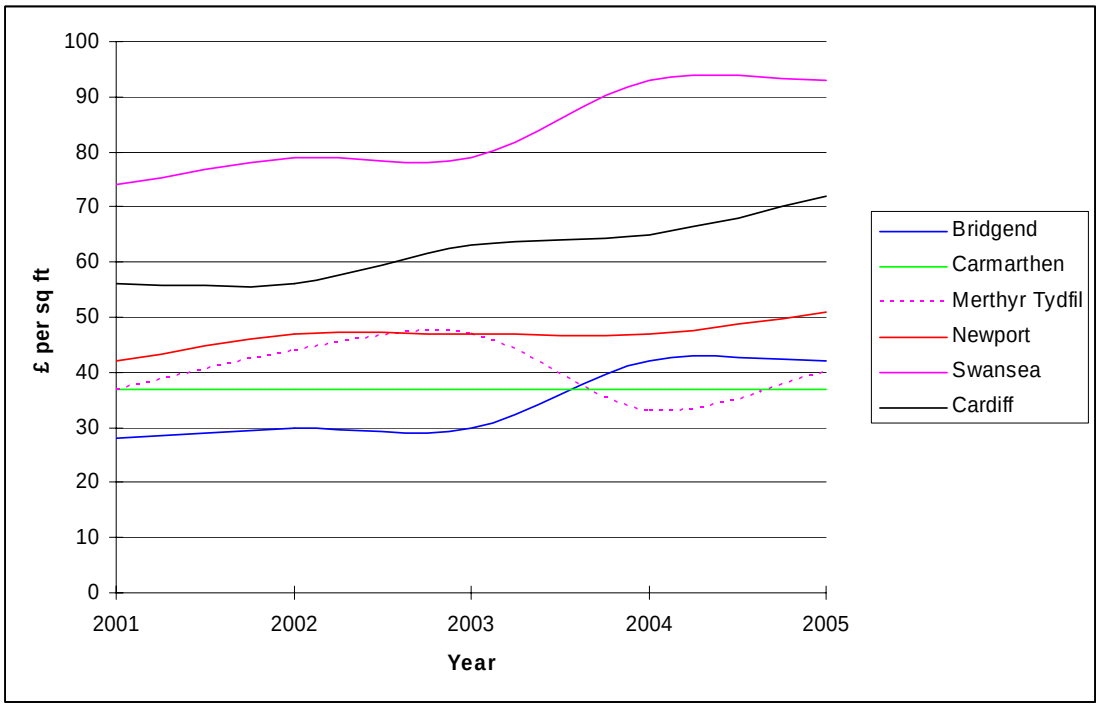


Figure 3 Secondary Retail Rental Values

Souce: Valuation Office Agency

Retail Yield

3.2.5 The retail yield[1] for Bridgend town centre fell for the third successive year in 2005 to 7.5% (see figure 4 below) suggesting continued investor confidence in the town centre. This figure is now below pre-pedestrianisation levels and indicates that any disruption and uncertainty caused by the physical regeneration works is now coming to an end. Regionally, this fall in yields has been replicated in Neath, Carmarthen, Pontypridd, Merthyr Tydfil and Newport, whilst Cardiff, Swansea and Llanelli rates remain the same as in 2004.

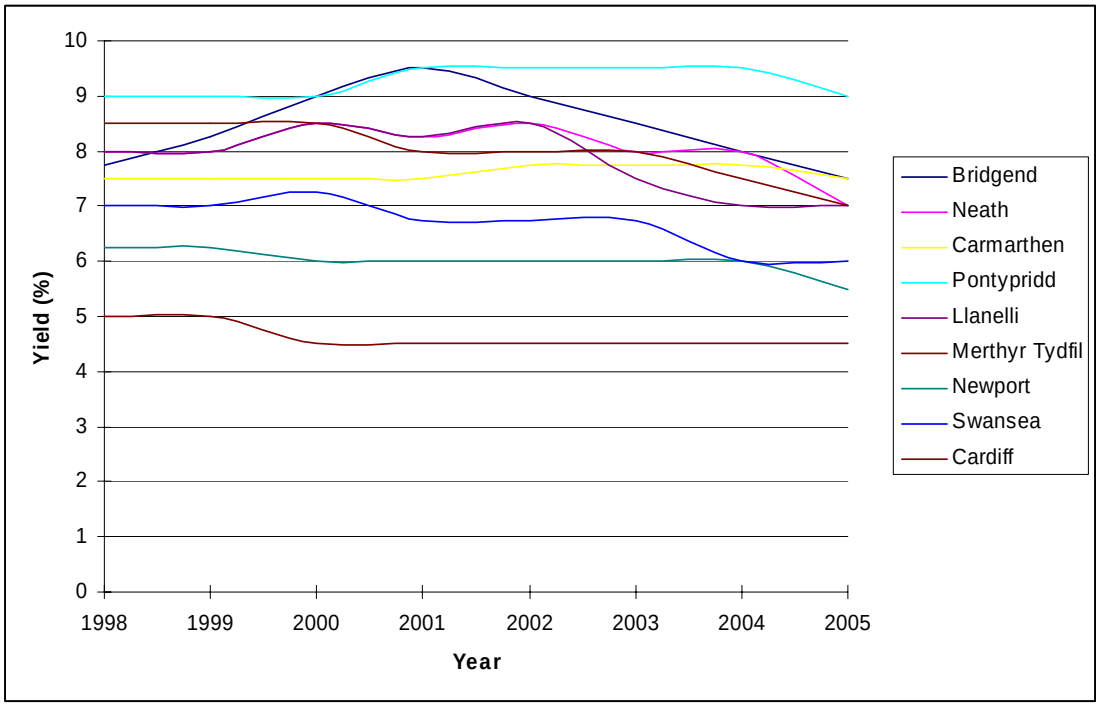


Figure 4 Retail Yields

Source: VOA

Office Rents

3.2.6 Primary office rental values in Bridgend town centre have, for the third year remained at £14 per sq ft. For the third year in succession this places it above Swansea; however renewed investment in Newport has seen its office rental figure rise above Bridgend for the first time since 2003(see Figure 5 overleaf).

3.2.7 There have been no high profile lettings of new office accommodation in the town centre during 2005; focus in the area has been directed to more out-of-town developments, such as Bocam Park at Junction 35 of the M4. However, office accommodation supply in the town centre still remains buoyant, with floorspace still available at Ravenscourt and, in early 2006, the newly completed refurbishment of 5 -7 Court Road.

[1] 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.

These developments significantly enhance the appeal of the town centre to commercial businesses looking to locate to the area.

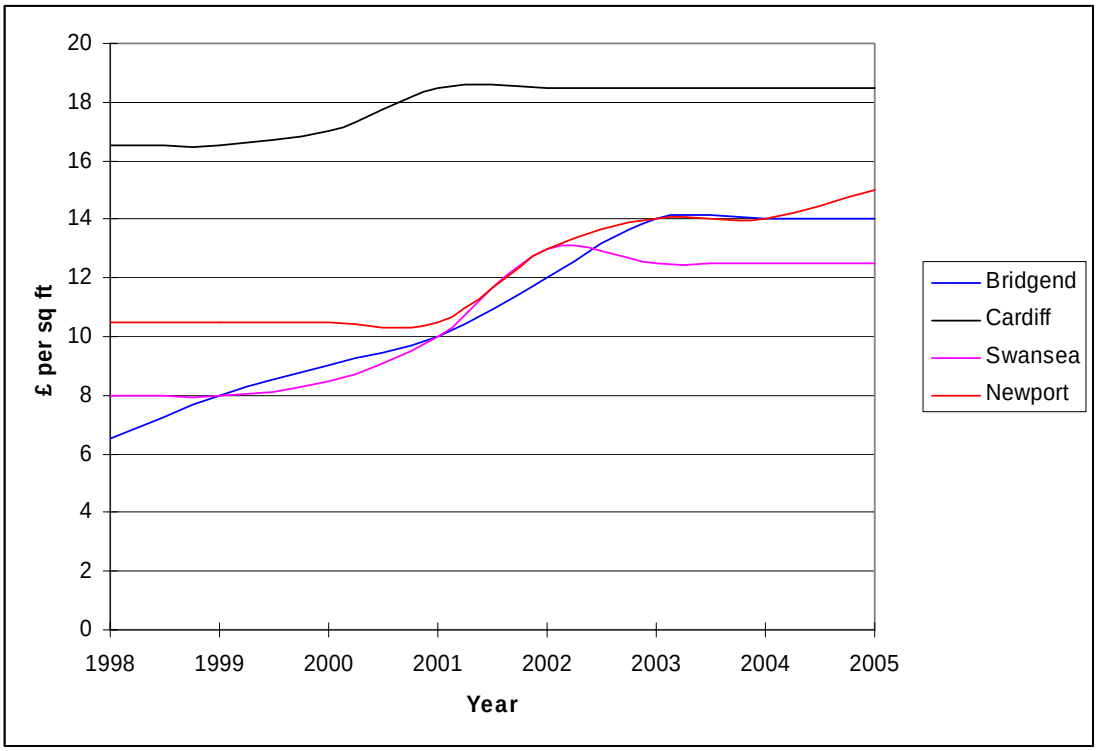


Figure 5 Office Rents

Source: Cooke and Arkwright

3.3 Retailer Representation, Change and Diversity of Uses

3.3.1 The Bridgend County Borough Retail Survey – October 2005 results for Bridgend town centre are displayed in table 1 overleaf (see also Section 6 of this report for more data plus distribution maps). This year's survey utilises the adopted Bridgend Unitary Development Plan boundary of the town centre for the first time. Once again, the number of convenience goods retailers in the centre has remained steady. The results for comparison goods show an increase in clothing retailers in the town centre; most notably this has been the opening of the Monsoon / Accessorize store on Adare Street.

3.3.2 There has also been a marked increase in the number of service properties; this has been caused by a reclassification of some units and closer examination of more peripheral areas of the town centre (i.e. Llynfi Lane). A more detailed examination of the service providers indicates a rise in the number of hair and beauty salons.

3.3.3 As mentioned previously, Monsoon / Accessorize were the most notable additions to the town centre during 2005. Other new-comers include the mobile phone store from *O²*, *Profile* in the Rhiw Centre and *Adecco* recruitment on Wyndham Street. Changes in 2005 which occurred after the survey were the reconfiguration of the *Top Shop* and *Dorothy Perkins* stores and the loss of *All Sports* from the Rhiw Centre (due to the national company going in to receivership). In late 2005 a reserved matters planning application was received for the Asda store at Cheapside, it is anticipated that this will be determined in early 2006.

3.3.4 After the disappointing jump in vacancy rates last year, 2005 has seen a drop in the number of unoccupied units. As noted last year, a number of vacant properties have been earmarked for redevelopment and during the last 12 months some of the Tarran workshops have been demolished in anticipation of works beginning on the Cheapside food store development. The vacancy rate therefore continues to be comparable with the national average; this gives the town centre the flexibility to accommodate new businesses, without the need for them to wait for suitable premises to become available.

Convenience Goods	**2002**	**2003**	**2004**	**2005**
Bakers & Confectioners	5	5	5	5
Butchers & Poulterers	1	1	1	1
Grocery	5	5	5	5
Off licences / Confectioners / Tobacconists / Newsagents	2	2	2	2
Total	**13**	**13**	**13**	**13**
Comparison Goods				
Footwear and Repair	6	6	5	5
Mens and Boys Wear	4	4	4	6
Womens, Girls, Children and General Wear	26	27	27	30
Furniture, carpets & textiles	13	13	13	12
Booksellers, arts, crafts, stationers, copy bureaux	9	10	11	9
Electrical, gas, music & photographic	20	21	21	21
DIY, hardware & housewares	6	5	4	4
China, glass, fancy & leather goods	6	8	5	5
Cars, motorcycles & motor accessories	1	1	1	2
Chemists, drug stores & opticians	13	13	14	14
Variety, department & catalogue	7	7	7	7
Florists, nurserymen & seedsmen	3	2	2	3
Toys, hobby, cycle & sports	9	9	10	9
Jewellers & repair	9	8	7	8
Other	13	14	14	14
Total	**145**	**148**	**145**	**149**
Service				
Restaurants, coffee bars, fast food & takeaways	36	38	38	39
Pub / Club	18	19	19	18
Hairdressers, beauty parlours & health centres	20	21	21	25
Laundries and Dry Cleaners	1	1	1	1
Travel Agents	7	7	7	7
Banks, Building Societies and Financial Services	25	26	25	24
Estate Agents and Valuers	13	12	11	11
Professional Services	13	18	16	35
Other	23	18	26	26
Total	**156**	**160**	**164**	**186**
Total comparison / convenience / service	**314**	**321**	**322**	**348**
Vacant units	**57**	**53**	**58**	**42**
Vacant units (% of total)	12.20	11.35	12.45	8.86
Vacant units (% of commercial units)	15.36	14.17	15.26	10.77
Residential properties	60	60	60	59
Total other properties	36	33	26	35
TOTAL	**467**	**467**	**466**	**484**

Table 1 Retail and Service Provision- Source: Bridgend CBC

3.3.5 Table 2 below displays the number of outlets in the town centre in relation to their size. As stated in past Health Checks, the supply of larger units continues to frustrate the easy development of large national multiple retailers. It is envisaged that more, larger units can be provided on several of the key redevelopment sites in the centre.

3.3.6 However, the abundance of small units does provide opportunities for start-up, indigenous retailers to get a foot-hold in the retail market. These will tend to be more specialist businesses, helping the town centre to maintain its own character and to stave-off the '*clone town*' image, which many centres of comparable size to Bridgend have been subject to.

Ground Floor Size of Property	**Number**	**%**
Under 1,000 sq ft.	234	49.37
Between 1,000 and 2,499 sq. ft.	153	32.28
Between 2,500 and 4,999 sq. ft.	52	10.97
Between 5,000 and 9,999 sq. ft.	22	4.64
Between 10,000 and 14,999 sq. ft.	9	1.90
Between 15,000 and 19,999 sq. ft.	3	0.63
Between 20,000 and 29,999 sq ft.	1	0.21
30,000 sq. ft. and above	0	0.00
Total	**474**	**100**

Table 2 Property Size Distribution

Source: Bridgend CBC

Bridgend Market

Convenience	**No. of Units**
Butchers, Poulterers and Fishmongers	5
Grocery	1
Off Licences / Confectioners / Tobacconists / Newsagents	2
Total	**8**
Comparison	
Footwear and Repair	1
Womens, Girls, Children and General Wear	4
Furniture, Carpets and Textiles	2
Booksellers, Arts, Crafts, Stationers, Copy Bureaux	1
Electrical, Gas, Music & Photographic	1
China, Glass, Fancy and Leather Goods	3
Florists, Nurserymen and Seedsmen	1
Variety, Department and Catalogue	1
Toy, Hobby, Cycle and Sports	3
DIY, Hardware & Housewares	1
Jewellers and Repair	1
Total	**17**
Service	
Restaurants, Coffee Bars, Fast Food and Takeaways	3
Hairdressers, Beauty Parlours and Health Centres	1
Total	**4**
Vacant	**2**

Table 3 Retail Provision in Bridgend Market – 2005

Source: Bridgend CBC

3.3.7 In line with previous years, Bridgend's Indoor Market has also been surveyed in addition to the main retail survey (see table 3 above) to recognise the contribution that it makes to the supply of goods and services to town centre users.

3.3.8 The market continues to significantly extend the offer and choice from the town centre to shoppers and other users. These include many of the smaller, traditional retailers and service providers which are no longer present in the wider town centre.

3.4 PEDESTRIAN FLOW

3.4.1 Towards the end of 2004, Bridgend County Borough Council installed automated footfall cameras in two locations in the town centre. The Rhiw Centre had installed similar cameras earlier in the same year.

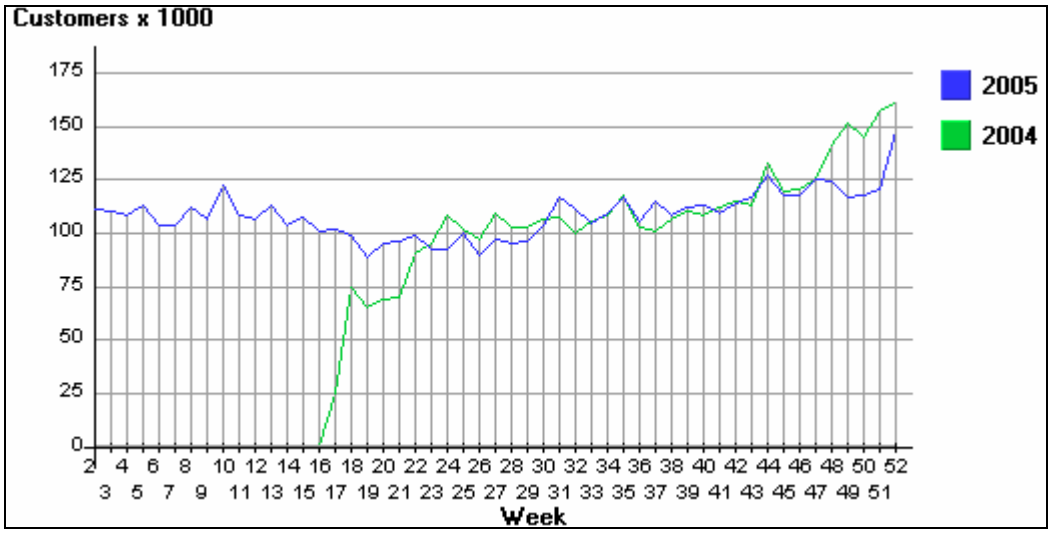


Figure 6 Rhiw Centre automated footfall data

Source: Rhiw Centre Management c/o Springboard

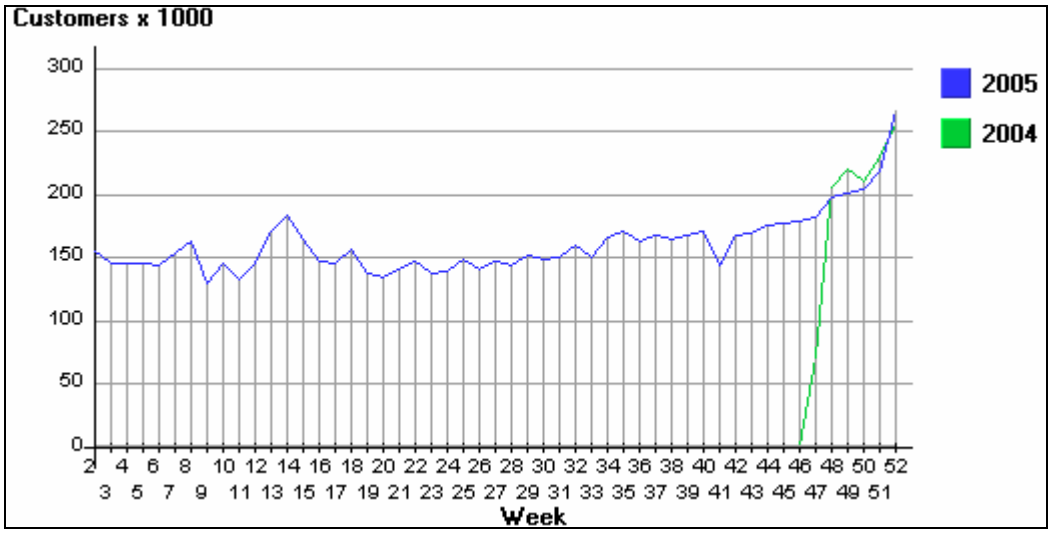


Figure 7 Bridgend town centre automated footfall data

Source: Bridgend CBC c/o Springboard

3.4.2 Whilst the cameras have not been in operation for two complete years to enable comprehensive comparisons, it is clear from Figures 6 and 7 above that footfall in 2005 was slightly lower than in 2004, particularly so in the run up to Christmas. However, information from Footfall

Limited indicates that this is consistent with national trends which saw decreases of up to 10% of weekly pedestrian flows compared to the same weeks in 2004. This national downturn has been interpreted as a sign of consumer uncertainty over the economy.

3.4.3 The only weeks when Bridgend town centre saw rises in footfall on the previous year were when events organised by the Bridgend Festivals Committee were taking place in the pedestrianised streets. Events such as 'Midsummer Madness' and the continental markets acted as significant attractors of people to the town, boosting the vitality of the centre on these days. These figures point to a significant benefit which pedestrianisation has brought to the town: the ability to hold cultural events which bring more people in to the centre and potentially increased trade to all retailers.

3.5 ACCESSIBILITY

3.5.1 The most significant increase in Bridgend's accessibility during 2005 was the re-opening of the Vale of Glamorgan railway line to passenger services. On the 12th June 2005, an hourly service between Bridgend and Cardiff via Barry was initiated, calling at new stations at Llantwit Major and Rhoose. A bus service from Rhoose meets the trains to connect to Cardiff International Airport.

3.5.2 Not only does this new link increase the accessibility of Bridgend town centre to shoppers from the Vale of Glamorgan, it also provides a major economic boost to commercial interests in the town with a fast, dedicated access route to Cardiff Airport. The South East Wales Transport Alliance (SEWTA) is considering the introduction of a half-hourly service on this route as part of a longer-term railway strategy.

3.5.6 Bus service provision, both internally within and externally beyond the County Borough has remained good. Bridgend town centre's state-of-the-art bus station won an award in 2005 for passenger transport in the annual Chartered Institute of Logistics and Transport (Cymru) National Awards.

3.5.7 The experimental second phase of pedestrianisation continued into 2005 with a simultaneous public consultation exercise which resulted in one sustained objection. This scheme has led to a safer shopping experience along Queen Street, Dunraven Place, and lower Market Street.

3.6 PERCEPTION OF SAFETY / OCCURRENCE OF CRIME

3.6.1 Public Order offences data has been supplied by South Wales Police regarding incidences which occur specifically in Bridgend town centre. It should be stressed that this data refers only to occurrences of crime reported to the police and will not necessarily reflect the total number of incidences.

3.6.2 In 2005 there were 565 Public Order Offences reported in Bridgend town centre (see table 8 below). This consisted of 128 incidents of Violet Disorder, 121 occurrences of criminal damage, 86 relating to Drunkenness and 230 Assaults.

3.6.3 In relation to the general location of crime, Figure 9 below indicates that most offences occur in the Derwen Road and Wyndham Street areas of the town centre. These areas have the highest concentration of pubs, bars, nightclubs and takeaways in the town centre which are associated with ant-social behaviour.

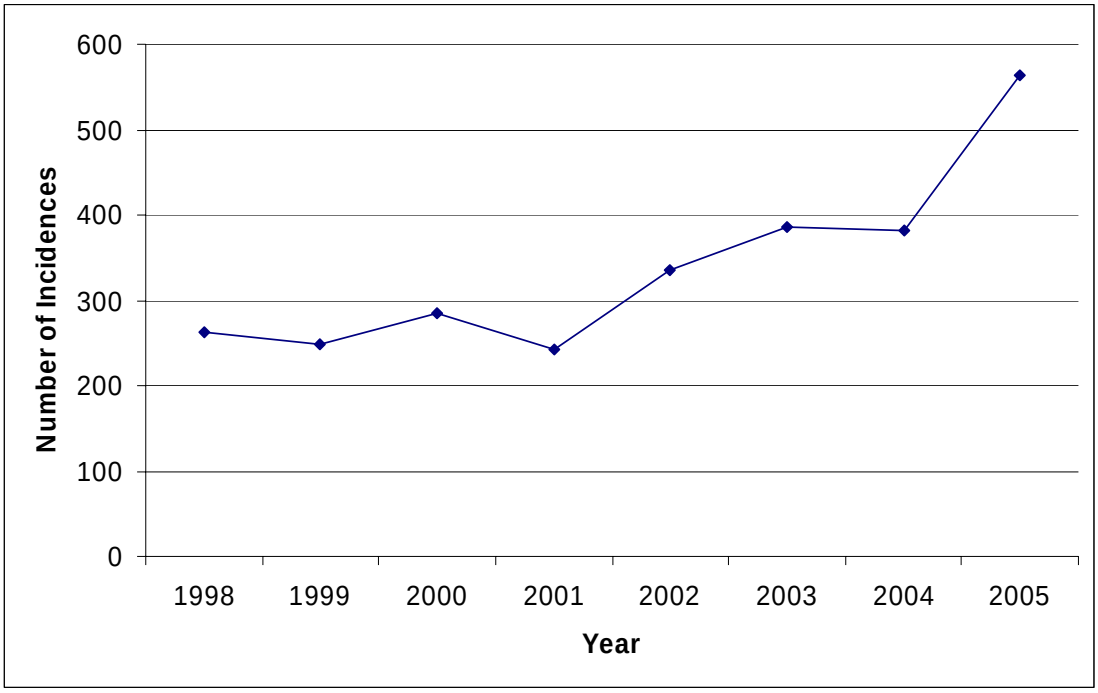


Figure 8 Total Incidents of Public Order Offences in Bridgend Town Centre

Source: South Wales Police

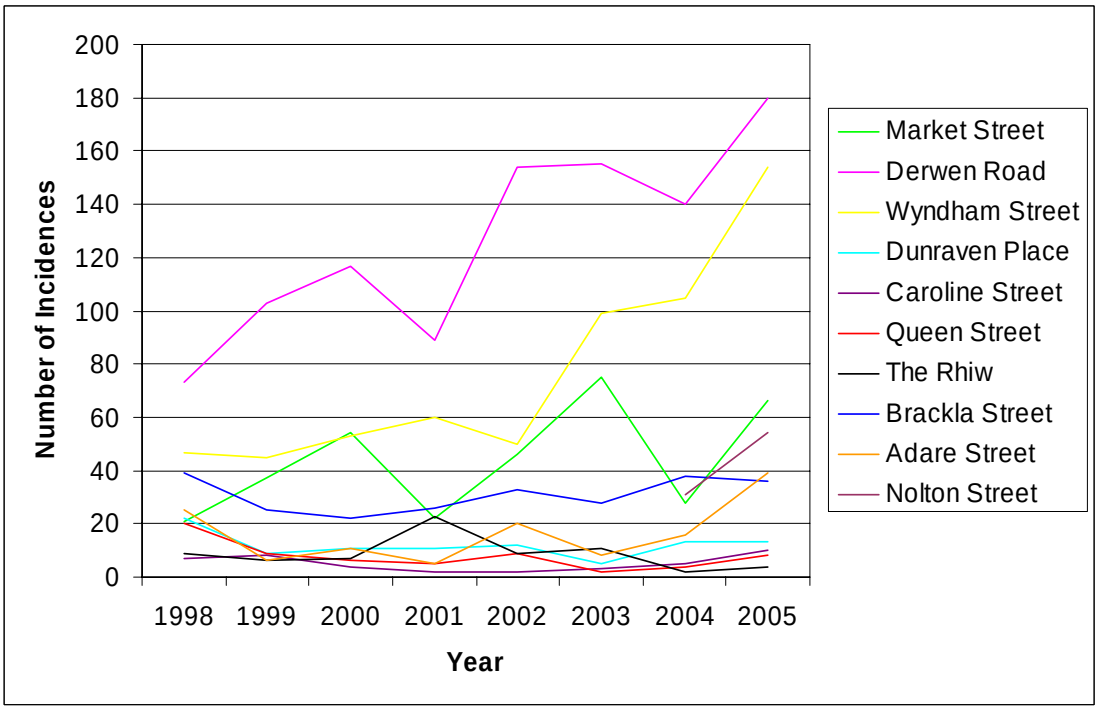


Figure 9 Public Order Offence Incidents by Location

Source: South Wales Police

3.7 ENVIRONMENTAL QUALITY

3.7.1 The general improvement in the environmental appearance of the town centre has continued during 2005 with the implementation of several schemes. A partnership between Bridgend Town Council and Bridgend County Borough Council has seen £50,000 invested in the restoration of the Grade II Randall Memorial at the junction of Court Road, Nolton Street and Caroline Street. The scheme has also afforded the opportunity for public realm improvements around the memorial, improving the street scene at this important junction within the town. Similarly, environmental improvements have been undertaken at the southern gateway to the town centre at the junction of Nolton Street and A473. An investment of £130,000 has been sourced from WDA Environment Programme, Bridgend County Borough Council, Bridgend Town Council and local business.

3.7.2 Following the successful Physical Regeneration Fund bid of £800,000 to the Welsh Assembly Government in 2004, work has begun on part of Phase IV of the regeneration programme within Queen Street and Dunraven Place. Work began in October 2005 and is expected to finish by the summer of 2006. Secondly, public realm improvements are also planned on Market Street between Dunraven Place and Quarella Road, which will include a new public square area in front of the existing job centre premises (see artists impression below). Works are scheduled to commence in June 2006 with funding in the order of £1 million secured from the Welsh Assembly Government Physical Regeneration Fund. Finally, in August 2005, Bridgend County Borough Council secured £5.3 million grant from European Regional Development Fund and Welsh Assembly Government Local Regeneration Fund. This will fund the implementation of a series of projects to 2008 including upgrading street furniture; safety and security measures; comprehensive public realm improvements in Brackla Street and Cheapside; and the construction of a town centre River Walkway.

Figure 9 Ongoing Public Realm Improvements to Queen Street

Figure 10 Planned Public Realm Improvements to Market Street

3.7.3 Last year's Health Check reported the successful THI funding bid to the Heritage Lottery Fund of £910,000 for conservation-led regeneration projects in Dunraven Place, Queen Street and parts of Market Place, Wyndham Street and Caroline Street. It is anticipated that approximately 8 well-designed projects will be submitted for financing under this scheme during 2006; the results of which will be outlined in next year's report. In addition, Bridgend County Borough Council and the WDA continue to operate a Town Improvement Grant programme in Bridgend town centre to undertake building improvement projects.

3.8 CUSTOMER VIEWS

3.8.1 The town centre perceptions study in 2004 was the last time any comprehensive analysis of customer views of the town centre were recorded. However, the Town Centre Regeneration Operational Group is looking to establish 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 view of the town centre and its environment.

3.8.2 However, customer views of the retailers within the town are also very important. If the town centre environment is improving, yet people receive poor customer service when conducting their business or shopping, they may leave with a bad impression of the town and not return. Therefore, as part of a wider study into the demand for business development and learning activities within the three town centres of the County Borough, Skillsmart Retail Ltd, will be undertaking 'Mystery Shopping' exercises with retailers who have volunteered to take part.

3.8.3 Twenty five independent retailers in Bridgend town centre will be assessed twice, the results of which will then be discussed with the company and this will explore the ways in which customer service can be improved.

3.8.4 An additional part of the study will be a 'town centre assessment' by an independent person who has never visited the town before. The results of these assessments will be presented in next year's Health Check.

3.9 CONCLUSIONS

3.9.1 In terms of the economic indicators of a town centre's vitality, 2005 witnessed a successful year for Bridgend. Increased retail rents, a continued fall in retail yield and sustained office rents all point to investor confidence in the town centre. This is exemplified by a fall in vacancy rates, new national multiple operators and the anticipated commencement of retail development schemes in the near future.

3.9.2 With regard to the accessibility of the town centre, this remains as high as ever and has been recognised by a national award for the bus station. The newly-opened Vale of Glamorgan line now gives a direct link to Cardiff Airport from Bridgend, as well as Rhoose, Llantwit Major and Barry.

3.9.3 Accessibility within the town centre has increased during 2005 with the continued pedestrianisation of Queen Street, Dunraven Place and lower Market Street. Phase IV of the regeneration programme will see this area physically improved by way of new pavement and pedestrian-friendly road surfaces. Other environmental improvements in the town include the restoration of the Randall Memorial as well as planned works at Market Street. The THI scheme along Dunraven Place will shortly be awarding the first grants to schemes which are eligible for funding.

3.9.4 Crime statistics for the town centre point towards an up-surge in criminal activity over the past few years. However, by looking at the general locations of this crime, it is clear that it relates more to the night time economy of the centre, rather than reflecting the safeness of the shopping streets during the day.

3.9.5 Finally, a new aspect of looking at town centre vitality: how customers perceive the traders, is being examined by the Skillsmart research. This will enable certain independent traders in the town centre to improve their business and customer service, thereby increasing users overall impressions of the town centre.

3.9.6 2005 has seen a continued improvement in the fortunes of Bridgend town centre. In 2006, the completion of the several environmental improvement schemes will, again, adding to the vitality of the town centre, whilst simultaneously improving the shopping environment for users. 2006 will also see the determination of the Asda reserved matters planning application at Cheapside, the implementation of which will significantly add to the offer of Bridgend town centre and should act as a catalyst to other major retail development proposals elsewhere in the town.

4. PORTHCAWL TOWN CENTRE HEALTH CHECK 2005

4.1 INTRODUCTION

4.1.1 Since the baseline study in 2002 there have been 3 town centre Health Checks carried out in Porthcawl by Bridgend County Borough Council. These have assessed the overall performance of the town centre against the relevant criteria detailed in Section 2 of the Technical Advice Notes 4 (Wales). Vitality and viability data such as rental values and capital yield are not as readily available for Porthcawl as they are for larger cities/towns such as Bridgend and Cardiff, making detailed analysis difficult. However, scope now exists for comparison and measurement of change in the overall health of the town centre which will result in an improvement on the comparative basis of the previous studies.

4.1.2 Porthcawl is located along the southern coast of Wales approximately midway between Cardiff and Swansea. With a population of around 15,800 (2001 Census), the area has a significant retirement and commuter residential base. In addition, Porthcawl has become a popular seaside tourist attraction with tourism being the main driver of the local economy.

4.1.3. Retailing in Porthcawl is concentrated along John Street, which is set on a north-south axis leading to the seafront. The street is pedestrianised and contains a variety of shops including retailers such as Boots, Woolworths, New Look and Peacocks. All major high street banks and building societies such as Barclays, Lloyds, HSBC, Halifax and the Principality are present. However it must be noted that the town centre lacks major retailing companies. Other retailing districts such as Bridgend town centre and the McArthur Glen outlet are attracting the leading retailers therefore leading to expenditure leakage within Porthcawl.

4.2 RETAIL AND OFFICE FLOORSPACE RENTS

4.2.1 Retail and office rents are important indicators of viability. Throughout recent years rental values in Porthcawl town centre have been fairly consistent. In 2003 floorspace rents were at £27-£28 per sq. ft. while in 2005, they have increased slightly to £30-£31. However, it must be noted that the current level of retail rents is still quite low, which exemplifies the relatively weak nature of Porthcawl's retail core.

4.2.2 By comparing prime retail rents of different retail centres of a similar size to Porthcawl, information can be ascertained as to how factors such as wealth and location can affect the price of rents and retail confidence. For example, if the price of rents in Maesteg were compared with that of Porthcawl it becomes clear that rents are lower in Maesteg (low to mid £20s). This could be partially due to factors such as Porthcawl's links to the M4 corridor and its greater wealth and affluence.

4.2.3 There is very limited information available on office rents. 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 reviewed and updated when information is available for future comparative analysis.

4.3 RETAILER REPRESENTATION, CHANGE AND DIVERSITY OF USES

4.3.1 Table 4 below shows the results of the 2005 Retail Survey for Porthcawl town centre along with the results from 2002, 2003 and 2004 studies for comparison purposes.

4.3.2 A total of 285 units were surveyed within the town centre. This figure is noticeably higher than the previous studies due to the inclusion of two additional streets of Marine Terrace, Lifeboat Road and The Square.

4.3.3 However in terms of retail domination, the general trend has remained the same, the Service Sector outlets continue to dominate the town centres (33.68%).

4.3.4 As the number of Service outlets continues to rise, the number of Convenience goods (11) and Comparison goods (72) has fluctuated, causing minor variations year on year.

4.3.5 There are 3 food stores in Porthcawl; a Somerfield on Lias Road, a small Spar on John Street and the newly established mini-market One Stop at the former Esplanade Hotel. However none provide the retail offer for a typical bulk shopping trip. This is emphasised in the 2004 Public Attitude Survey where 50% of the patrons of the town centre rated the choice of Food Shops in Porthcawl as poor or very poor. A report by Colliers CRE in 2002 has also shown that there is deficiency in food shopping in the Porthcawl Area with many residents travelling to Bridgend to conduct their grocery shopping. This trend has remained the same since the publication of the report.

4.3.6 However, the Council recognises the need of a major Food Store within the area and therefore land has been allocated within Porthcawl's Development Framework for this purpose.

4.3.7 Table 5 illustrates that over half of all units surveyed in 2005 are below 1,000-sq. ft. in size. It is therefore clear that Porthcawl successfully encourages small-businesses to its centre. With a combination of low rents and the nearby M4 transport corridor, Porthcawl is a prime location for small-businesses. However, due to the lack of space for the development of larger units within the town-centre, major retailers are unable to locate their businesses along John Street. This only leaves the possibility of several outlets combining to form one larger unit. In an attempt to resolve this issue, the Bridgend Unitary Development Plan (UDP) and the Porthcawl Regeneration Framework has allocated a site for a large-scale convenience retailer to help anchor the town centre.

PORTHCAWL	2002	2003	2004	2005
Convenience Goods				
Bakers & Confectioners	3	3	3	2
Butchers & Poulters	2	2	2	1
Grocery	5	5	5	4
Off licences / Confectioners / Tobacconists / Newsagents	2	3	3	3
Total	**12**	**13**	**13**	**10**
Comparison Goods				
Footwear and Repair	4	4	4	4
Men's and Boys Wear	0	0	0	0
Women's, Girls, Children and General Wear	16	14	14	14
Furniture, carpets & textiles	7	8	7	7
Booksellers, arts, crafts, stationers, copy bureaux	8	8	8	7
Electrical, gas, music & photographic	6	8	7	4
DIY, hardware & housewares	3	2	2	2
China, glass, fancy & leather goods	1	1	3	3
Cars, motorcycles & motor accessories	1	1	1	2
Chemists, drug stores & opticians	7	7	7	7
Variety, department & catalogue	4	4	4	4
Florists, nurserymen & seedsmen	0	0	0	2
Toys, hobby, cycle & sports	3	4	4	4
Jewellers & repair	4	4	3	3
Other	9	9	10	10
Total	**73**	**74**	**74**	**73**
Service				
Restaurants, coffee bars, fast food & takeaways	17	20	21	23
Pub / Club	7	7	7	9
Hairdressers, beauty parlours & health centres	10	7	8	9
Laundries and Dry Cleaners	2	2	2	1
Travel Agents	5	4	4	3
Banks, Building Societies and Financial Services	7	7	8	8
Estate Agents and Valuers	6	6	6	6
Professional Services	8	8	7	10
Other (Including Guest Houses, Hotels etc.)	30	26	27	27
Total	**92**	**87**	**90**	**96**
TOTAL	**177**	**174**	**177**	**179**
VACANT UNITS	**12**	**14**	**13**	**23**
VACANT UNITS (% OF TOTAL)	**4.50%**	**5.28%**	**4.89%**	**8.07%**
TOTAL OTHER PROPERTIES	**78**	**77**	**76**	**83**
TOTAL PROPERTIES SURVEYED	**267**	**265**	**266**	**285**

Table 4: Retail and Service Provision
Source: Bridgend CBC

Distribution of Outlets by Size		
Under 1,000 sq ft.	148	51.93%
Between 1,000 and 2,499 sq. ft.	106	37.19%
Between 2,500 and 4,999 sq. ft.	22	7.72%
Between 5,000 and 9,999 sq. ft.	7	2.46%
Between 10,000 and 14,999 sq. ft.	0	0.00%
Between 15,000 and 19,999 sq. ft.	1	0.35%
Between 20,000 and 29,999 sq ft.	1	0.35%
30,000 sq. ft. and above	0	0.00%
Total	**285**	**100.00%**

Table 5: Property Size Distribution
Source: Bridgend CBC

4.3.8 Porthcawl town centre currently benefits from the occupation of a number of multiple comparison and convenience retailers, which include:

Comparison Goods:		**Convenience:**
Boots	Seconds Ahead	Greggs
Woolworths	New Look	Somerfield
Peacocks	Clarks	Spar
Superdrug	Stead&Simpson	One Stop

The above list is rather limited in choice and serves only the basic needs of the local people. The town centre offers no major comparison retailing attraction to anchor and support the larger community.

4.3.9 Porthcawl town centre has become a popular leisure destination that has grown over time to serve the wider tourist community rather than only it's local residents. It contains a mixture of uses appropriate to a small coastal town including retail, leisure and community facilities. The Grand Pavilion, which is located on the edge of the town centre, provides a range of functions such as conferences, weddings, comedy, theatre and musical performances.

Retail Demand

4.3.10 The FOCUS database stores information on the demand for units in town centres. It indicates that 8 retailers have identified a requirement to locate in the town centre since February 2005.

- 3 food retailers require floor-space between 400sq ft and 14,600sq ft

- 5 non-food retailers require floor-space between 1,000sq ft and 5,000sq ft

4.3.11 A number of new retailers have recently opened shops in Porthcawl. These include One Stop, Foresight Optical, Threshers and Thompson Travel Agents.

4.3.12 However it must be noted that in 2005 there has been a significant increase in the number of vacant shops within the town centre compared to the previous years. Stated below is the percentage of vacant shops between 2002 and 2005.

2002	4.50%
2003	5.28%
2004	4.89%
2005	8.07%

4.3.13 There are two possible reasons why this has occurred. The first is that the adoption of the Unitary Development Plan means that the town centre retail boundary was extended to include the streets of Lifeboat Road, Marine Terrace and The Square of which contains 4 additional vacant units.

4.3.14 The second reason relates to the redevelopment of the former Esplanade Hotel. At the time the survey was conducted all four units were vacant. However between the months of November and December 2005 one retailer 'One Stop Mini-Market' occupied three of the units. This will be shown in greater detail in the 2006 Retail Survey.

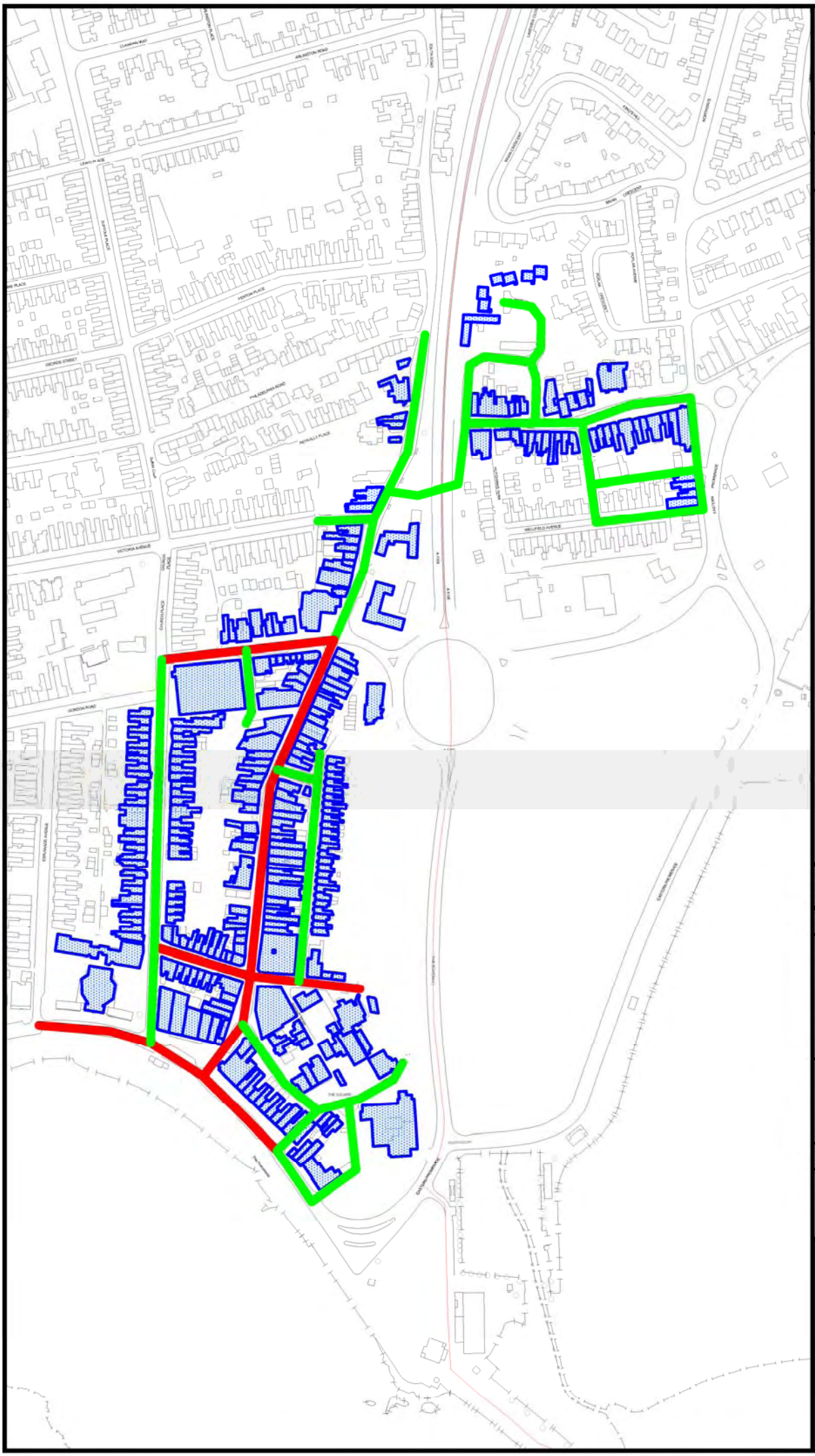
4.4 PEDESTRIAN FLOW

4.4.1 There is no published pedestrian flow information available for Porthcawl town centre and it is therefore difficult to assess changes in pedestrian flows or to enable comparisons to be made. However, through street observations, the pedestrianised section of John Street is the busiest with a moderate to high pedestrian flow. Lias Road, Well Street, Dock Street and the Esplanade are also primary pedestrian routes. All four streets merge into John Street providing accessibility and route choice for pedestrians.

4.4.2 Low flows are mostly apparent along the section of New Road that is located in the northern section of the town centre. It is the secondary shopping area of Porthcawl and is separated from the core centre by the A4106 dual carriageway, which impedes movement into the area. A pedestrian subway links the north end of John Street with 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. Recently, landscaping and painting of the subway has occurred to encourage visitors to explore the New Road shopping area. Other secondary pedestrian routes within the town centre are Mary Street, James Street, Hillsboro Place and Lifeboat Road. The map below (figure 11) indicates the primary and secondary pedestrian routes for Porthcawl town centre.

4.5 ACCESSIBILITY

4.5.1 Porthcawl town centre can be accessed by a variety of methods including foot, bicycle, car and public transport. The town is located within easy reach of the M4 with a dual-carriage forming part of the link to junction 37. Hillsboro car park is extremely close to the town centre and therefore enables visitors to be within walking distance to the



N
W E
S

Porthcawl Town Centre
Health Check 2005

Pedestrian Flow

Red = Primary Routes
Green = Secondary Routes

Scale = 1:4000

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Cyngor Bwrdeistref Sirol
Pen-y-bont ar Ogwr
BRIDGEND
County Borough Council

prime-shopping district of John Street. Accessibility for pedestrians has increased in recent years by the pedestrianisation of John Street from the junction with Lias Road, southwards towards the seafront. This has greatly reduced the pedestrian/vehicular conflict within the town centre as 86.8% of users stated within the Public Attitude Survey that in terms of pedestrian friendliness, the town centre was considered to be very good or good.

Public Transport

4.5.2 Regular bus services run to and from nearby principal towns. The three main bus operators providing these services are First Cymru Buses Limited, Stagecoach Rhondda and Travel Final Limited. Table 6 below states the current bus service provision for Porthcawl town centre.

No.	**Operator** FC – First Cymru Buses Ltd. SR – Stagecoach Rhondda TF – TravelFinal Ltd.	**Route**	**Days of Operation**	**Frequency** **P – Peak 08:00 – 18:00** **OP – Off Peak**
X2	FC	Porthcawl – Bridgend - Cardiff	Monday to Saturday	P – Every 20 minutes OP – Hourly
X2	FC	Porthcawl – Bridgend - Cardiff	Sunday	Hourly
61	FC	Porthcawl – West Park Drive - Porthcawl	Monday to Saturday	10:00 – 17:00 Every 30 minutes
62	FC	Porthcawl – Bridgend - Pencoed	Monday to Saturday	09:00 – 17:00 Hourly
63	FC	Porthcawl – Bridgend via Pyle, The Pines, POW Hospital	Monday to Saturday	P – Every 20 minutes OP – Hourly
63	FC	Porthcawl – Bridgend via Mawdlam, Pyle, The Pines, POW Hospital	Sunday	09:00 – 22:00 Hourly
172	SR	Porthcawl – Bridgend - Aberdare	Monday to Saturday	08:00 – 18:00 Hourly
224	FC	Porthcawl - Port Talbot - Swansea	Monday to Saturday	07:25 – 17:45 Hourly
801	TF	Porthcawl to Danygraig Avenue	Monday to Saturday	09:00 – 16:00 Hourly
803	TF	Porthcawl to Rest Bay	Monday to Saturday	09:00 – 16:00 Every 90 minutes

Table 6 Bus Service Provision

4.5.3 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 provides for access to local rail services.

4.5.4 In future, Public Transport in Porthcawl will be reinforced by the introduction of a Park and Ride facility to serve the town. Also Porthcawl's Development Framework notes that new public transport routes and bus stops are to be provided.

Car Parking

4.5.5 Currently there are 2,590 off-street parking spaces within a short distance to Porthcawl town centre. Salt Lake car park is used on a seasonal basis, particularly during the summer period when tourism in the area is at its peak. There is also a car park located at Rest Bay offering an additional 1,800 spaces; however as it is not within close proximity to the town centre, it has not been included in the table above. Porthcawl offers both short and long stay car parks, all operating on a 'pay and display' system to suit the needs of the local community and visitors. The Esplanade and Eastern Promenade provide an additional 150 on street car parking spaces, which are occupied all year-around.

4.5.6 Table 7 below list the off-street car parks within Porthcawl.

Car Park	No. of Spaces
John Street	80
Hillsboro Place	240
Somerfield	170
Salt Lake	2,000
Total	**2,590**

Table 7 Car Park Provision
Source: Bridgend CBC

4.6 CUSTOMER VIEWS AND BEHAVIOUR

4.6.1 There have been no new surveys of users of the town centre within Porthcawl since the Research and Marketing Report of 2002 that was included within the 2003 and 2004 Health Checks. However it is expected that very little has changed within the past 3 years.

4.6.2 It is envisaged that new surveys will be conducted in 2007/08 that will include an updated user attitude report. In addition, in late 2005, Skillsmart Retail Limited was commissioned by the Council to undertake survey work in Porthcawl town centre which would:

- Provide an understanding of the market that retailers are working within Porthcawl;
- Clarify the anticipated future of retail activity in each of the three areas being investigated;
- Conduct an analysis of the business development and skills issues for retailers in Porthcawl;
- Understand the current level and form of business and learning support for the retail sector in Porthcawl;
- Stimulate interest amongst independent retailers in business development activities, through the application of a mystery shopping exercise.

The results of these assessments will be presented in next years' Health Check.

4.7 PERCEPTION OF SAFETY / OCCURRENCE OF CRIME

4.7.1 Porthcawl town centre benefits from CCTV coverage. A total of six cameras are strategically placed along the streets of Lias Road, John Street, Hillsboro Car Park and the Esplanade. Also a large number of outlets also have their own surveillance systems for monitoring purposes. The town centre is also well equipped with street lighting. John Street appears to be the most well lit street as it is the preferred route for the majority of pedestrians. However there is no statistical data regarding crime specifically available to Porthcawl town centre.

4.8 PORTHCAWL REGENERATION

4.8.1 Porthcawl has experienced the structural problems found in most British seaside resorts. Improvements in air travel and cheap packages have enabled people to have a wider choice of holiday destinations. Current trends show that seaside resorts in warmer climates are more appealing than of British coasts and therefore towns similar to Porthcawl have been in decline of visitors. Such towns have born the brunt of such a phenomenon and now offers what some would argue is a 'dated product'.

4.8.2 In response to redress the social and economic decline and environmental deterioration within Porthcawl, a Development Framework was prepared for the regeneration of the maritime area fronting Sandy Bay. Its adoption as Supplementary Planning Guidance (SPG) on the 2nd of December 2004 has now brought the belief that Porthcawl can re-establish itself as a modern, vibrant and diverse seaside resort. The SPG document will be afforded 'substantial weight' in future planning decisions of the Local Planning Authority, the National Assembly and Inquiry Inspectors. Figure 12 below highlights the regeneration area of Porthcawl together with specific land use allocations.

4.8.3 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.

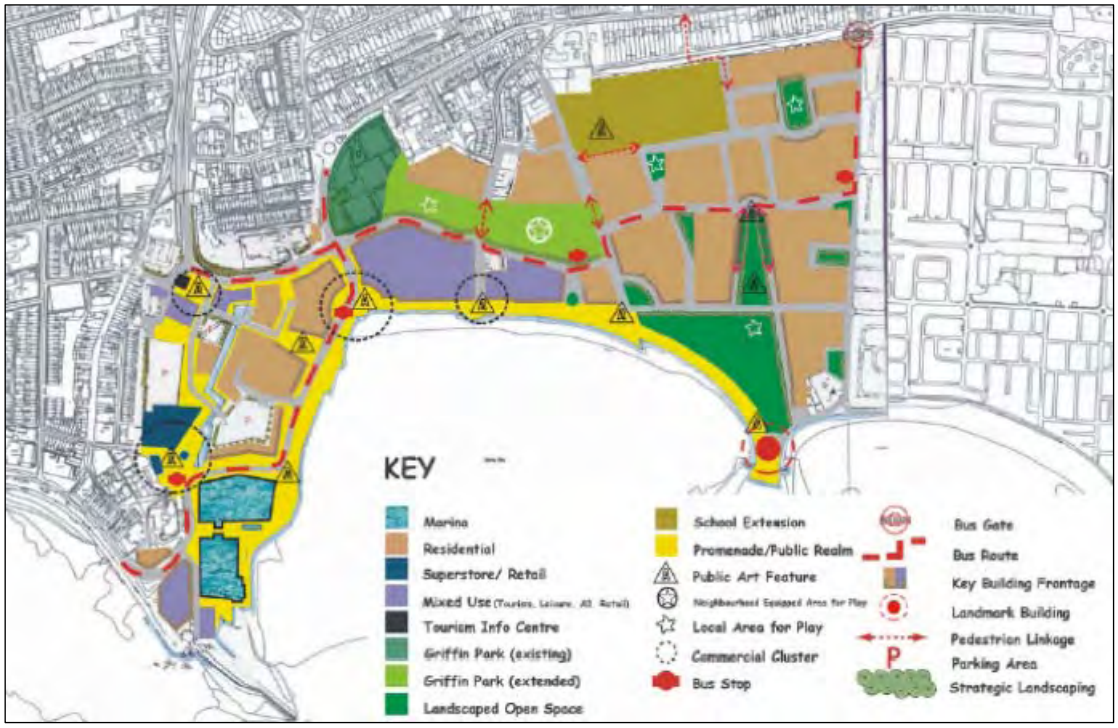


Figure 12: Porthcawl Development Framework Masterplan

4.8.4 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.

4.8.5 The Porthcawl Development Framework outlines several key areas for which further studies are needed. In 2005, Halcrow was commissioned by the Council to undertake an engineering/technical feasibility study of the marina proposals and costal protection aspects of the regeneration proposals. Further work on other aspects will be required in the future.

4.9 CONCLUSION

4.9.1 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 since 2004. Figures for secondary retail rents were unavailable at the time of the study
- There are no current statistical data regarding Office rents for the past two years but from that available, it appears that they are higher than those in comparable centres within the County Borough i.e. Maesteg
- Service Sector outlets continue to dominate Porthcawl town centre in 2005.
- Half of all units (53.33%) surveyed in 2005 are below 1,000-sq. ft. in size
- The vacancy rate in Porthcawl stands at 8.07%. This is a sharp increase compared to previous years which may be accounted

for by differences in the survey. Nevertheless this is still well below the national average of approximately 10 percent.

- Sufficient car parking spaces is provided for shoppers/visitors of the town centre
- Porthcawl town centre is widely accessible by all modes of transport apart from the rail network.
- Environmental quality of Porthcawl town centre is found to be of high standard with clean streets, sufficient litterbins, recycling banks, public art, street lighting and the pedestrianisation of John Street.

4.9.2 From this assessment it is clear that Porthcawl town centre continues to perform an important role in the retailing hierarchy of the County Borough. It is very encouraging to see an increase in the prime retail rents of this smaller town centre, as well as very low vacancy rates. The town centre continues to be highly accessible by a choice of means of transport and, upon arrival, visitors and shoppers are greeted by a high-quality street scene and environment.

4.9.3 In the future, the town centre will benefit from a new supermarket, as one of the first phases of implementation of the Porthcawl Development Framework. This will significantly boost the retail offer and attractiveness of the town, with linked trips between the new and existing stores. Through this period of change, the annual Health Checks will continue to monitor the overall performance of the town centre so that the Council's planning and other policies can be amended accordingly.

5. MAESTEG TOWN CENTRE HEALTH CHECK 2005

5.1 INTRODUCTION

5.1.1 There have been three previous town centre Health Checks carried out in Maesteg by the County Borough Council, the base line study being 2002.

5.1.2 The commercial core is compact and is centred around Commercial Street and Talbot Street, however it 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. 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.

5.1.3 The 2004 Maesteg health check concluded that the town has a good mix of convenience / comparison and service sector uses. Vacancy rates had continued to decrease when compared to previous years. The rate is now in line with the national average.

5.1.4 The 2004 Health Check noted that the environmental quality of the town centre was seen as 'fairly poor' and was a key concern in the 2003 public perception survey conducted by Research and Marketing Limited . However, it was concluded that the environmental quality of the town was set to be enhanced by a comprehensive town centre regeneration programme which should lead to increased public satisfaction with the town centre.

5.1.5 In respect of the 2005 Health Check it should be noted that survey work has been undertaken on the new Commercial Centre Boundary as defined by Policy R1 of the adopted Bridgend Unitary Development Plan, which was adopted on the 12th May 2005. The new Commercial Centre is larger than that surveyed in the previous Health Checks (as defined in the Ogwr Borough Local Plan) and now includes the retail stores along Llynfi Road, which include Aldi, Argos and Iceland.

5.2 PROPERTY MARKET INDICATORS

5.2.1 As with the 2004 town centre Health Check due to a lack in availability of reliable market information it has not been possible to update the Retail Floorspace Rents for Maesteg. Statistics from 2003 have again been used.

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

5.2.3 Table 8 shows that Maesteg has the lowest primary retail rents when compared 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. There is also some local information suggesting that these rental levels have decreased in recent years. This reflects Maesteg's lower role in

the retail hierarchy compared to other bigger centres such as Bridgend or the prime centres such as Cardiff and Swansea.

	£ sq ft (2002)	£ sq ft (2003)	£ sq ft (2004)	£ sq ft (2005)
Maesteg	20	25	-	-
Bridgend	60	60	65	70
Porthcawl	27	28	-	31
Neath	70	70	70	70
Port Talbot	45	45	45	55
Pontypridd	50	55	60	60
Merthyr Tydfil	60	65	65	70
Cardiff	240	250	265	285
Swansea	105	155	160	160

Table 8 Primary Retail Rents

Source: 2002 / 2003 / 2004 Colliers CRE & Cooke and Arkwright

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 RETAILER REPRESENTATION, CHANGE AND DIVERSITY OF USES

5.3.1 Table 9 below, shows the results of the 2005 Retail Survey for Maesteg town centre (see section 6 of this document). The results from the 2002, 2003 and 2004 surveys have also been included for comparison purposes.

5.3.2 As detailed in the introduction, the 2005 retail survey was conducted on the commercial centre defined in the Bridgend Unitary Development Plan, which is larger than that defined in the Ogwr Borough Local Plan. Therefore, it should be noted that the number total number of properties surveyed has risen from 165 to 173.

Maesteg	2002	2003	2004	2005
Convenience Goods				
Bakers & Confectioners	3	3	3	3
Butchers & Poulters	2	2	2	2
Grocery	4	3	3	5
Off licence / Confectioners / Tobacconists / Newsagents	1	2	2	2
Total	**10**	**10**	**10**	**12**
Comparison Goods				
Footwear and Repair	4	5	5	4
Mens and Boys Wear	0	1	1	1
Womens, Girls, Children and General Wear	9	10	10	11
Furniture, carpets and textiles	6	4	4	3
Booksellers, arts, crafts, stationers, copy bureax	2	2	2	2
Electrical, gas, music & photographic	4	5	5	3
DIY, hardware & housewares	3	3	3	4
China, glass, fancy & leather goods	3	2	2	0
Cars, motorcycles & motor accessories	0	0	0	0
Chemists, drug stores & opticians	9	8	8	9
Variety, department & catalogue	5	4	4	6
Florists, nurserymen & seedsmen	2	2	2	2
Toys, hobby, cycle & sports	4	4	6	4
Jewellers & repair	1	1	1	2
Other	7	5	5	9
Total	**59**	**56**	**58**	**60**
Service				
Restaurants, coffee bars, fast food & takeaways	15	16	16	17
Pub /Club	4	9	8	9
Hairdressers, beauty parlours & health centres	6	7	7	6
Laundries and Dry Cleaners	1	1	1	1
Travel Agents	3	3	3	3
Banks, Building Societies and Financial Services	8	8	8	6
Estate Agents and Valuers	3	4	5	3
Professional Services	3	5	5	7
Other	4	10	10	11
Total	**47**	**63**	**63**	**63**
TOTAL				
VACANT UNITS	**24**	**20**	**18**	**16**
VACANT UNITS (% OF TOTAL)	**14.54**	**12.12**	**10.91**	**9.25**
TOTAL OTHER PROPERTIES	**25**	**16**	**16**	**22**
TOTAL PROPERTIES SURVEYED	165	165	165	173
Source: Bridgend CBC				

Table 9 Retail and Service Provision in Maesteg Town Centre
Source: Bridgend County Borough Council

5.3.3 The information in Table 10 also compares the retail land use surveys of the Maesteg commercial area undertaken in 2002, 2003, 2004 and 2005 in percentage terms.

	2002	2003	2004	2005	GB Average
Convenience	6.06	6.06	6.06	6.94	9
Comparison	35.76	33.94	35.15	34.68	48
Services	33.33	38.18	38.18	36.42	32
Vacant	14.54	12.12	10.91	9.25	11

Table 10 Diversity of Uses

Source: Bridgend County Borough Council

5.3.4 Tables 9 and 10 show, that in 2005, service outlets continue to dominate the town centre as in previous years. 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, which is a trend reflected in many British towns and cities which have also seen growth in the service sector.

5.3.5 The numbers of comparison and convenience goods outlets have increased between 2004 and 2005; however this increase is in part due to the change in survey area as detailed above. It is also due to the subdivision properties into two units; an example of this is the Bingo and Amusement Arcade on Commercial Street .

5.3.6 The convenience goods outlets have remained static between 2002 and 2005. The convenience goods sector does satisfy a main shopping need particularly in the food sector where there are a number of supermarkets including Somerfield, Aldi and Iceland.

5.3.7 In respect of convenience retailing, planning permission has been granted for a large edge of centre foodstore with associated parking 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.

5.3.8 The number of vacant properties in Maesteg have decreased from 18 units to 16 units. The vacant properties only account for 9.25% of properties in 2005 which is below the national average. 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 third year in succession where vacancy rates have fallen and they are now more comparable with the national average.

5.3.9 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)	Floorspace Sq Ft (2005)	2002 %	2003 %	2004 %	2005 %
Convenience	34,100	28,976	24,874	41,472	13.25	9.75	9.65	14.48
Comparison	91,149	86,929	90,740	99,850	35.41	34.23	35.25	34.86
Services	85,885	91,386	91,967	87,942	33.36	35.87	35.73	30.70
Vacant	22,992	28,976	27,233	29,630	8.93	11.37	10.58	10.34
Total	**234,126**	**236,267**	**234,814**	**262,726**				

Table 11 Diversity of Uses (floorspace)

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

5.3.10 Convenience / comparison / services/Vacant outlets account for a total of 151 properties and cover an area of 258,894 sq. ft. This is considerably smaller than Bridgend which has a total floorspace area of approximately 750,000 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.

5.3.11 The loss of the large convenience goods store on Llynfi Road led to a major fall in convenience floorspace during 2003, however Maesteg has experienced significant growth in the amount of convenience floorspace in 2005. This is due to the inclusion of the large Iceland and Aldi stores within the Maesteg Commercial Area.

5.3.12 The main reason for the increase in comparison floorspace has been the inclusion of the Argos store on Llynfi Road. However Maesteg still 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. The fomer Somerfield store on Llynfi Road, which is vacant, does provide an opportunity to increase the comparison floorspace within Maesteg by attracting a large multiple comparison retailer.

5.3.13 Table 11 also illustrates that the actual service floorspace has remained static. Notwithstanding this, the proportional split of service goods floorspace has decreased due to the major increase in large comparison and convenience outlets.

5.3.14 Table 12 below illustrates the distribution of outlets by size within Maesteg town centre:

Under 1,000 sq. ft.	80	46.24%
Between 1,000 and 2,499 sq. ft.	62	35.84%
Between 2,500 and 4,999 sq. ft.	23	13.29%
Between 5, 000 and 9,999 sq. ft.	5	2.89%
Between 10, 000 and 14,999 sq. ft.	2	1.16%
Between 15,000 and 19,999 sq. ft.	1	0.58%
Between 20,000 and 29,999 sq. ft.	0	0.00%
30,000 sq. ft. and above	0	0.00%
Total	**173**	**100.00%**

Table 12 Outlet Size Distribution

Source: Bridgend BCBC

5.3.15 As in previous years it almost half of all properties surveyed in 2005 are below 1,000 sq. ft. This suggests that Maesteg , does well in encouraging small independent retailers serving local needs. It does not provide the flexibility for major retailers who require large stores. 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.

5.3.16 There has been an increase in the number of stores between 2,500 and 4,999 sq. ft. from 19 units in 2004 to 23 units in 2006. There has also been an increase in the number of stores between 5, 000 and 9,999 sq. ft. from 3 to 5 stores. Both these increases are due to the inclusion of the Stores along Llynfi Road.

Maesteg Market

5.3.17 Markets are a feature at the heart of many towns in Wales that provide valuable services to their local communities. Maesteg Market is situated on Talbot Street in the heart of the town centre and consists of permanent indoor stalls, casual and permanent outdoor stalls.

5.3.18 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. Table 13 shows the contribution that the market stalls make to the service, convenience and comparison goods on offer in the town centre. The market provides 9 additional convenience units, 16 comparison units and 3 service units which have not been accounted for in either the County Borough's Annual Retail Survey nor through commercially provided data. There are a further 5 vacant units which provide further opportunities for new small retailers.

MAESTEG MARKET	No. of Units
Convenience	
Bakers and Confectioners	2
Butchers, Poulterers and Fishmongers	4
Grocery	2
Off Licences/Confectioners/Tobacconists/Newsagents	9
Total	**9**
Comparison	
Women's, Girls, Children and general wear	2
Booksellers, arts, crafts, stationers, copy bureaux	5
Electrical, gas, music & photography	1
Florists, nurserymen and Seedsmen	1
DIY, hardware & housewares	1
Jewellers and Repair	1
Toy, hobby, cycle and sport	2
Furniture, carpets & textiles	1
Variety	2
Total	**16**
Service	
Restaurants, coffee bars, fast food and takeaways	1
Hairdressers, Beauty Parlours and Health centres	1
Other	1
Total	**3**
Vacant	**5**

Table 13 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 Argos, Woolworths and New Look are recognised as key attractors to the town centre and are ranked in the top 20 comparison retailers by Focus, a leading research company for commercial information. In terms of convenience goods Maesteg contains Somerfield, Aldi and Iceland store with Tesco looking to develop an edge of centre store.

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
National Westminster Bank	Thompson	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. 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.

5.4 Accessibility

5.5.1 Maesteg town centre is highly accessible by car and public transport with both the bus and railway stations located within the commercial area. The principal bus routes from Maesteg access all areas of the surrounding Llynfi Valley including a quarter hourly services to Bridgend, an hourly service to Swansea, and approximately a quarter hourly service to Cymmer. The railway continues to provide a regular service which links up to the wider rail network at Bridgend

5.5.2 In terms of road transport, the principal roads which access 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.

5.5.3 In respect of access for pedestrians and cyclists, there are many residential properties within and adjoining the commercial area of Maesteg, consequently there is an extensive catchment area within cycling and walking distance. However, as detailed in previous studies, there is a conflict between pedestrian and vehicular traffic. The town centre regeneration programme has been designed to improve pedestrian and cycle access within the town centre and remove the conflict with vehicular traffic.

5.5.4 The first phase of the regeneration programme along Commercial Street, included:

- Furnished pedestrian areas with improved signage;
- Improved access for buses and cyclists;
- Installation of Bicycle racks 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; and
- Creation of new pedestrian crossings.

The first phase of the regeneration programme has provided an attractive, accessible and safe environment for the pedestrians and cyclists.

5.5.5 The multi-storey car park located on Llynfi Road provides for 340 free car-parking spaces which serve the town centre. The Council has improved this car park, by carrying out work on the general environment which included: re-painting, new lighting, new surfaces and the installation of CCTV cameras to increase safety.

5.6 PEDESTRIAN FLOWS

5.6.1 As stated in the previous Health Check, there had been no detailed pedestrian flow surveys undertaken for Maesteg until 2004. Previous observations had indicated a relatively strong pedestrian flow within the retail core on Talbot Street, where the multiples are located, however no firm evidence had been provided. Due to the lack of accurate pedestrian flow information, Research and Marketing Ltd were commissioned to undertake a pedestrian survey in March 2004.

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 14

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

5.6.2 From Table 14 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 Environmental improvements in the town centre have continued throughout 2005. The first phase of the town centre's regeneration programme, which started in the summer of 2004, was completed in September 2005 and included the following projects:

- The planting of trees along 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;
- Installation of Bicycle racks 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; and
- Creation of new pedestrian crossings.

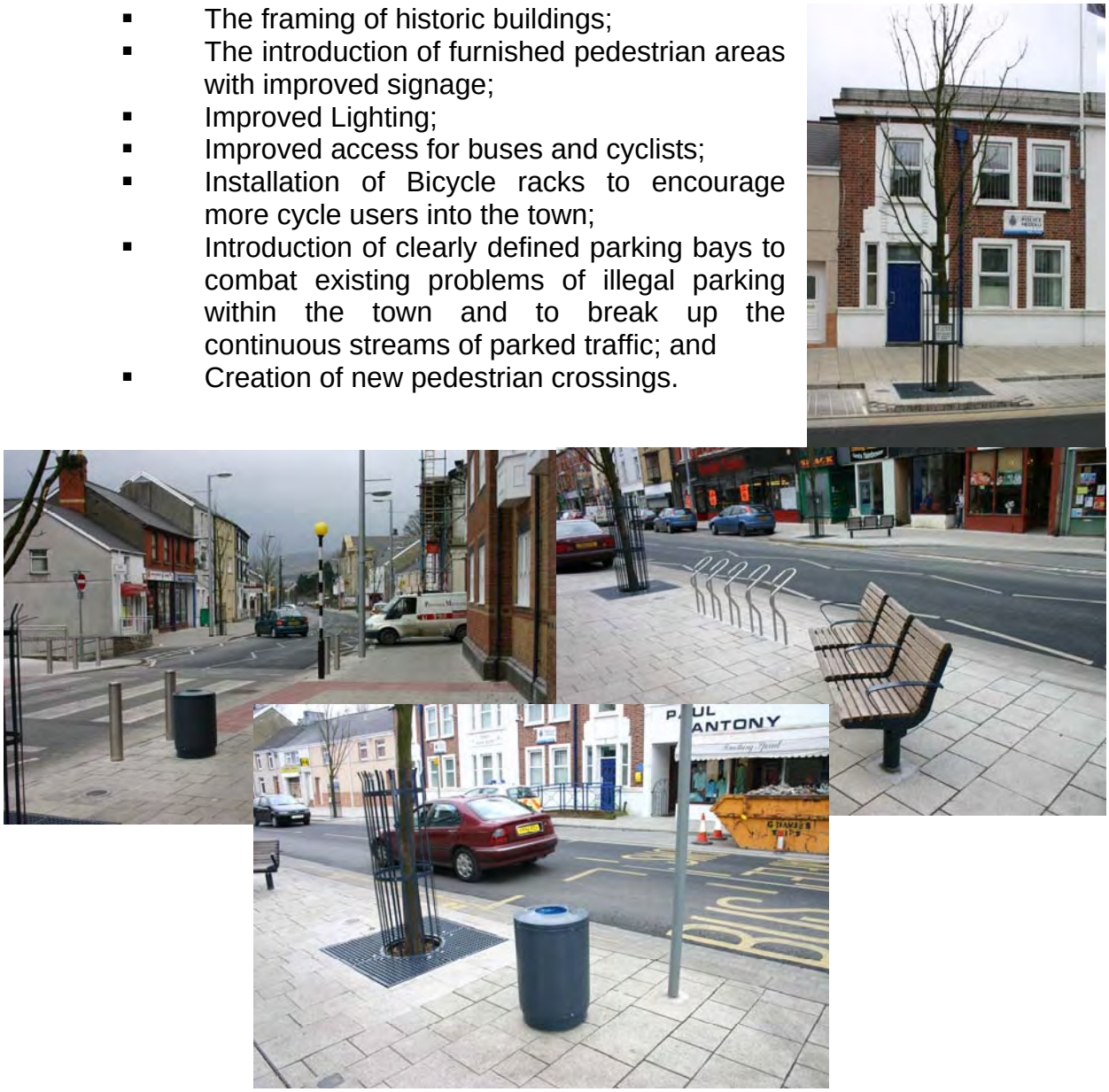


Figure 13 Commercial Street 2005
Source: Bridgend CBC

5.7.2 The new street furniture, materials and lighting have 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.

Figure 14 New paving with bronze discs at key locations designed and moulded by young people in Maesteg.

5.7.3 Funding has been approved for a second phase of improvements, to be implemented in 2006, these will focus on Plasnewydd Street and will include a new ramped footbridge over the river to replace the existing structure. This will improve the pedestrian link between Talbot Street and the multi storey car park. The scheme will also include environmental improvements with the installation of new lighting, signage, repaved footways and landscaping.

5.7.4 A third phase of the regeneration programme is planned, which will focus on improvements to Talbot Street up to the junction with Castle Street and will include pavement widening, new street furniture and lighting. The third phase will also focus on enhancement of the setting of several listed buildings on Talbot Street by creating a new public space in front of the Town Hall. These improvements will complement the restoration works already completed to the town hall, which is a well-known landmark of Maesteg.

Figures 15 Maesteg Town Hall 2005
Source: Bridgend CBC

5.7.5 With respect to the buildings within the commercial core, economic decline has led to a reduced expenditure in the repair and maintenance of building fabrics which has contributed to the deterioration in the built environment. The County Borough Council is assisting in the accessing and management of grant schemes aimed at improving a number of buildings within Maesteg. The building improvement grant schemes are aimed at reinforcing the special character of Maesteg and where improvements are made, care is taken to conserve or replace features of interest using traditional materials and installing shop fronts that are in a sympathetic style.

5.7.6 In the past year some of Maesteg's long-standing eyesores have been refurbished and improved with grant aid. For example 50 and 51 Commercial Street, the former Prince of Wales pub and the Tabor Church, which is adjacent to the commercial centre and has been vacant and derelict for many years. So far, improvements to 12 town centre buildings have been secured through the Townscape Heritage Initiative,with funding from the Heritage Lottery, the Welsh Assembly Government, Cadw and Bridgend County Borough Council.

Figures 16: Building Improvement Works
Source: Bridgend CBC

5.7.7 Its is acknowledged that partnership working is critical to the success of the overall regeneration programme and the following arrangements have been put in place:

- Regular meetings of the Maesteg Town Centre Regeneration Operational Group.
- The Council works closely working with funding agencies and a secured commitment from the Welsh Development Agency, Welsh Assembly Government and Cadw.
- 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.

5.8 CUSTOMER VIEWS AND BEHAVIOUR

5.8.1 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 in the 2003 and 2004 reports. However, the Regeneration Group is looking to establish a timetable for repeating the survey on a regular basis (3 years) in order that comparison can be made of the publics views of the town centre and it's environment.

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 provide crime information on a much wider geographical area than the town centre.

5.9.2 The town centre has 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.

5.9.3 The installation of modern, bright vandal proof lights along Commercial Street will contribute to improving the town's image and perception of safety. The future phases of the town centre Regeneration programme will also included improved lighting which should improve the perception of safety.

5.10. CONCLUSIONS

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

- Due to the lack of up to date and accurate retail rent information it is becoming increasingly difficult to compare Maesteg with other town centres within the South Wales area.
- 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 third year in a row vacancy rates have decreased. In 2005 the rate was 9.25%, which is below the national average.
- The majority of premises in Maesteg town centre (46.82%) have a floorspace area of less than 1,000 sq. ft.
- Maesteg has experienced significant growth in the amount of convenience and comparison floorspace in 2005. This is due to the inclusion of the large Iceland, Aldi and Argos stores along Llynfi Road within the Maesteg Commercial Area.
- There continues to be 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. The vacant Somerfield store on Llynfi Road does provide an opportunity to attracting a large multiple comparison retailer.
- Maesteg Market provides additional convenience, comparison and service units which have not been accounted for in either the County Borough's Annual Retail Survey nor through commercially provided data.
- 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.

5.10.2 The assessment of Maesteg town centre for 2005 has illustrated some evident signs of increased levels of vitality and viability over the past year. This is particularly reflected in the further decrease in vacancy levels and the continuing take up of grants to improve the structure of buildings in the town.

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 Tesco 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 continuing to be enhanced by a series of phases of town centre regeneration. The first of which has been completed with the second phase commencing in 2006. The improvements should lead to increased consumer satisfaction with the

environmental quality in Maesteg, this was a key concern in the 2003 consumer survey. Due to the improved lighting, pavements and CCTV, pedestrians will feel safer from vehicular traffic 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 forth successive year, the Council has undertaken its own survey into the uses of all of the smaller Established Commercial Centres within the County Borough.

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

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

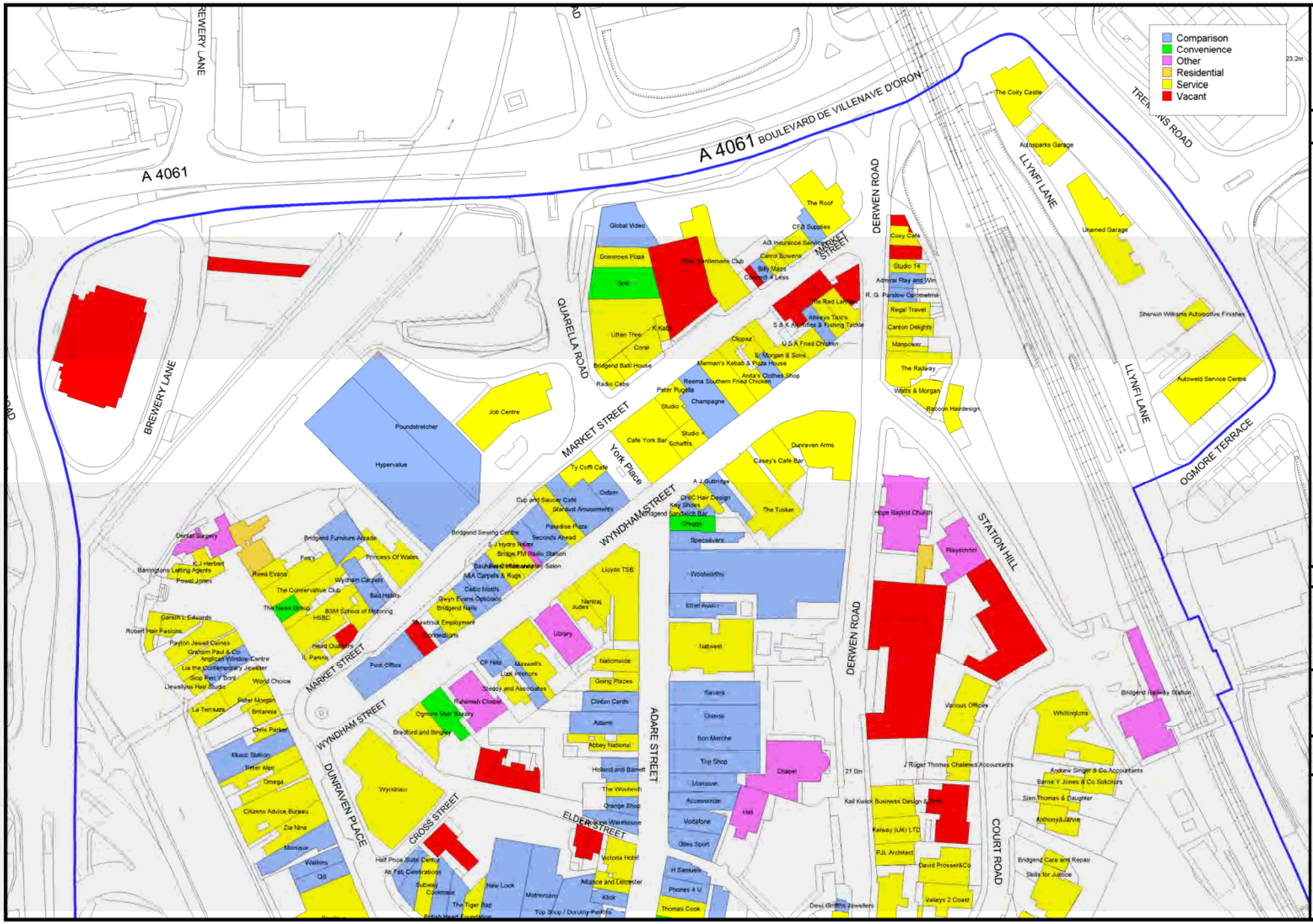
6.1.3 The retail hierarchy of the County Borough is defined by Policy R1 of the adopted Bridgend Unitary Development Plan as follows:

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

6.1.4 This survey was conducted in October 2005 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 - 2005

	No. of Units	Area (sq. ft.)		% of Commercial Units
Total Properties Surveyed:	474	887,320		
Total Service / Convenience / Comparison / Vacant	390	760,900		
Total Other (includes Residential Properties & Community Facilities etc.)	84	126,420		
Total Vacant	42	86,221	Percentages are of Total Properties	10.77%
% Vacant	8.86%	9.72%		
Total Convenience	13	39,199		3.33%
% Convenience	2.74%	4.42%		
Total Comparison	149	309,310		38.21%
% Comparison	31.43%	34.86%		
Total Service	186	326,170		47.69%
% Service	39.24%	36.76%		
Convenience Goods				
Bakers and Confectioners	5	4,737		
Butchers & Poulters	1	463		
Grocery	5	32,567		
Off licences / Confectioners / Tobacconists / Newsagents	2	1,432		
Total	**13**	**39,199**		
Comparison Goods				
Footwear and Repair	5	6,685		
Mens and Boys Wear	6	7,802		
Womens, Girls, Children and General Wear	30	61,566		
Furniture, carpets & textiles	12	19,745		
Booksellers, arts, crafts, stationers, copy bureaux	9	13,650		
Electrical, gas, music & photographic	21	23,767		
DIY, hardware & housewares	4	4,976		
China, glass, fancy & leather goods	5	4,126		
Cars, motorcycles & motor accessories	2	15,338		
Chemists, drug stores & opticians	14	28,164		
Variety, department & catalogue	7	69,995		
Florists, nurserymen & seedsmen	3	3,157		
Toys, hobby, cycle & sports	9	11,251		
Jewellers & repair	8	5,414		
Other	14	33,674		
Total	**149**	**309,310**		
Service				
Restaurants, coffee bars, fast food & takeaways	39	48,450		
Pub / Club	18	59,476		
Hairdressers, beauty parlours & health centres	25	15,942		
Laundries and Dry Cleaners	1	819		
Travel Agents	7	6,835		
Banks, Building Societies and Financial Services	24	39,208		
Estate Agents and Valuers	11	11,165		
Professional Services	35	46,768		
Other	26	97,507		
Total	**186**	**326,170**		
Distribution of Outlets by Size				
Under 1,000 sq ft.	234	49.37%		
Between 1,000 and 2,499 sq. ft.	153	32.28%		
Between 2,500 and 4,999 sq. ft.	52	10.97%		
Between 5,000 and 9,999 sq. ft.	22	4.64%		
Between 10,000 and 14,999 sq. ft.	9	1.90%		
Between 15,000 and 19,999 sq. ft.	3	0.63%		
Between 20,000 and 29,999 sq ft.	1	0.21%		
30,000 sq. ft. and above	0	0.00%		
Total	**474**	**100.00%**		



Bridgend County Retail Survey October 2005

BRIDGEND TOWN CENTRE (NORTH)

Scale = 1:1250

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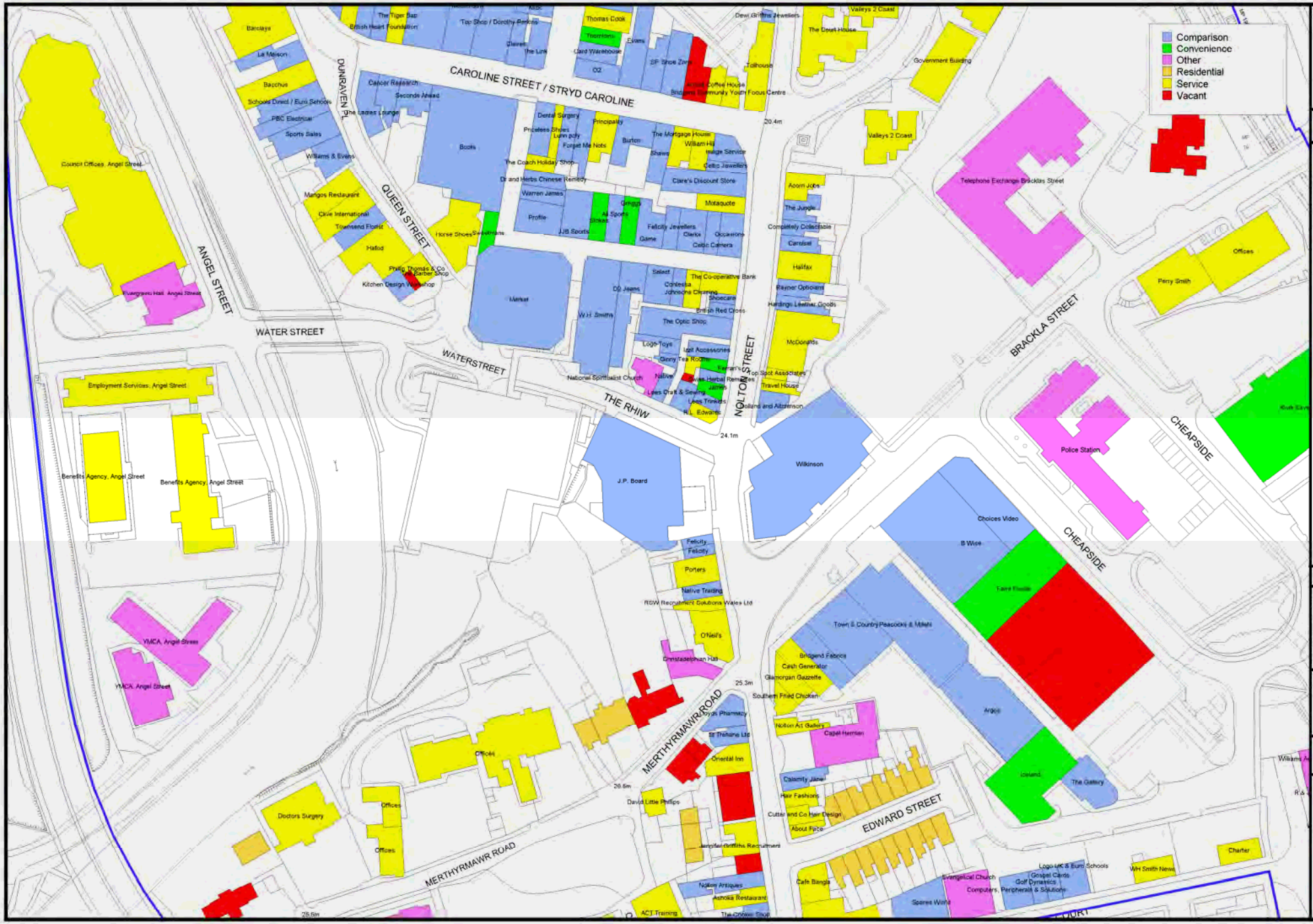
Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr
BRIDGEND County Borough Council



Bridgend County Retail Survey October 2005

BRIDGEND TOWN CENTRE (CENTRAL)

Scale = 1:1250

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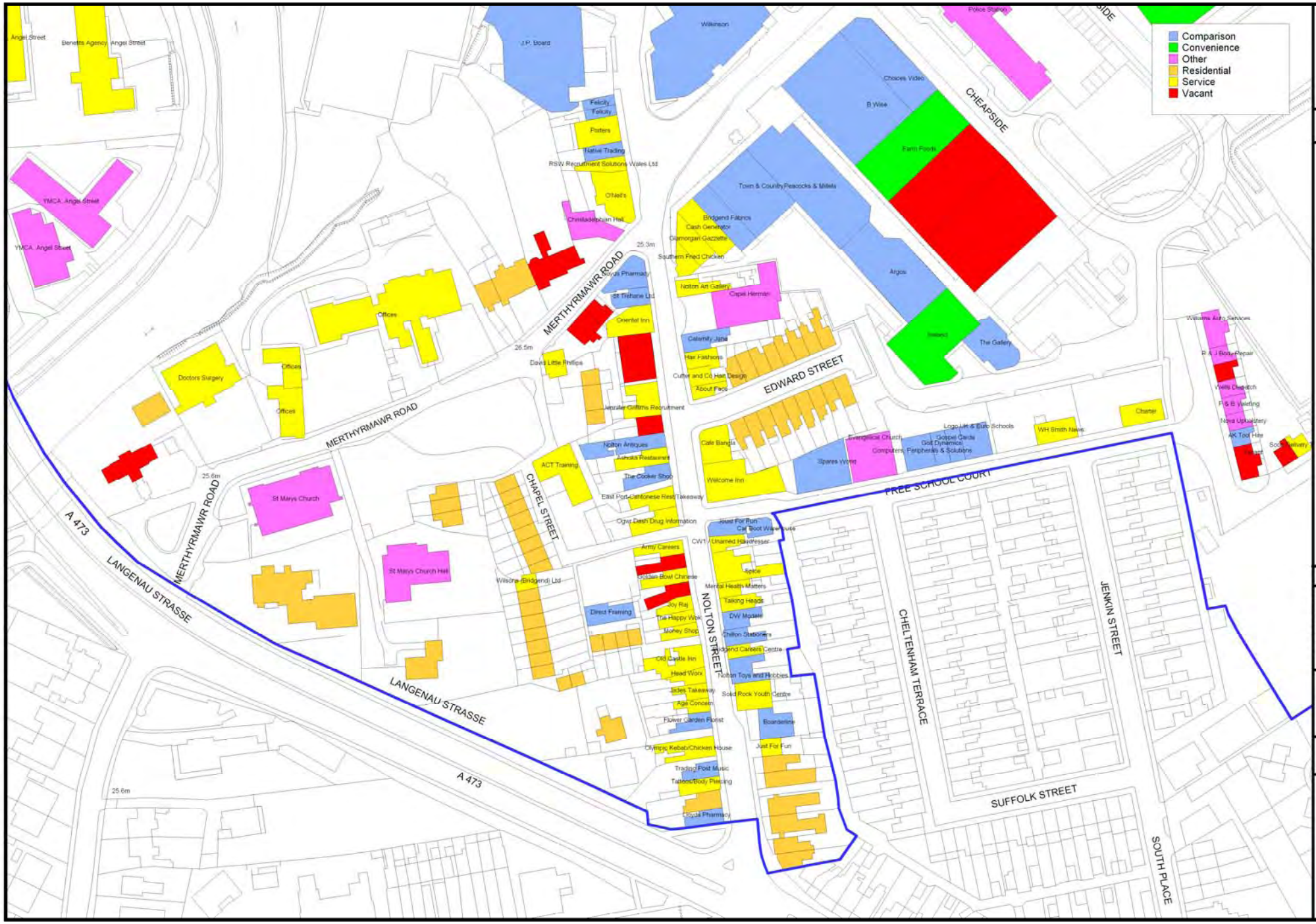
Pen-y-bont ar Ogwr
BRIDGEND



Bridgend County Retail Survey October 2005

BRIDGEND TOWN CENTRE (SOUTH)

Scale = 1:1250

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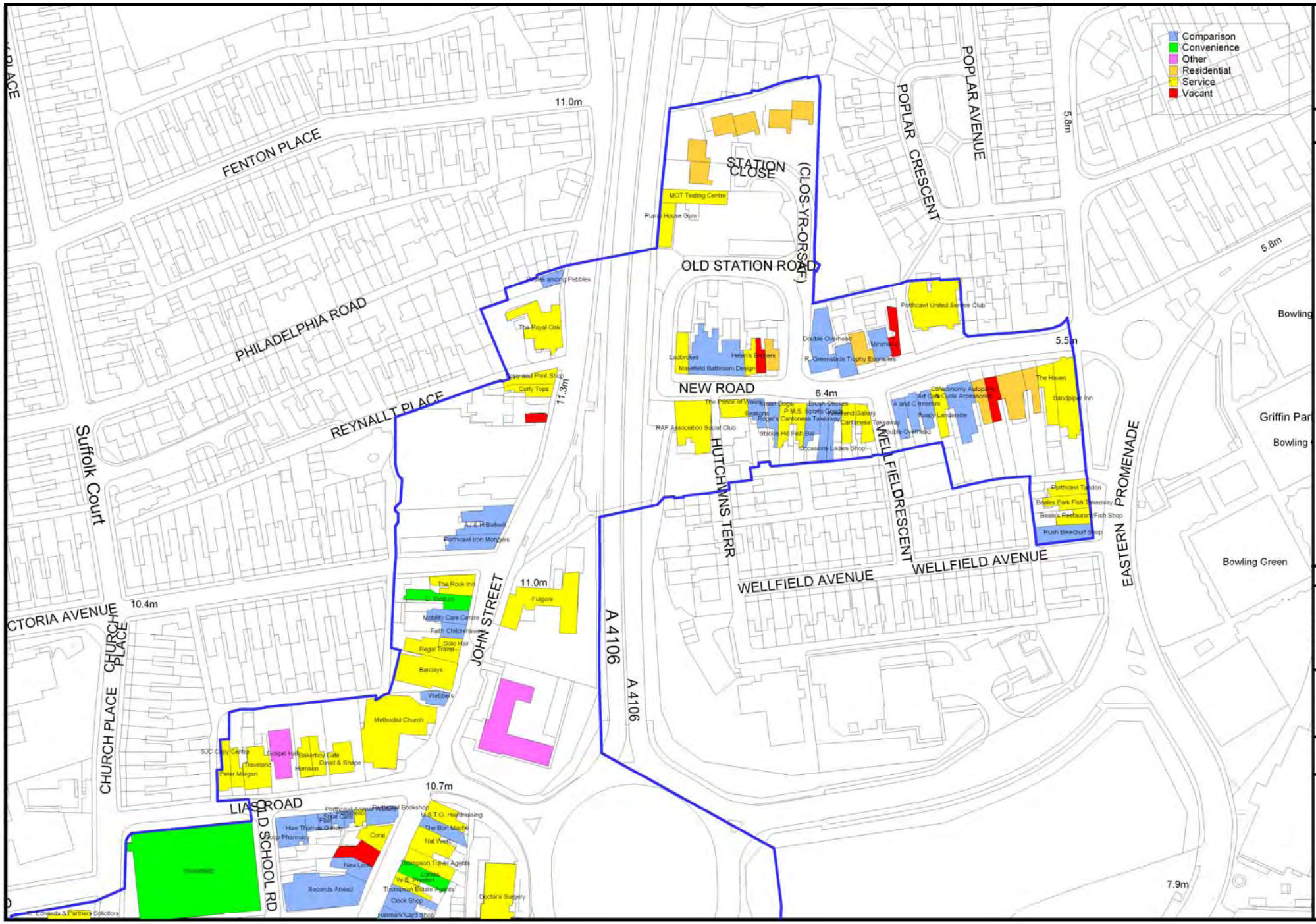
Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr
BRIDGEND County Borough Council

PORTHCAWL - 2005

	No. of Units	Area (sq. ft.)		% of Commercial Units
Total Properties Surveyed:	285	427,139		
Total Service / Convenience / Comparison / Vacant	202	326,680		
Total Other (includes Residential Properties & Community Facilities etc.)	83	100,459		
Total Vacant	23	29,801	Percentages are of Total Properties	11.39%
% Vacant	8.07%	6.98%		
Total Convenience	10	34,853		4.95%
% Convenience	3.51%	8.16%		
Total Comparison	73	97,355		36.14%
% Comparison	25.61%	22.79%		
Total Service	96	164,671		47.52%
% Service	33.68%	38.55%		
Convenience Goods				
Bakers and Confectioners	2	2,393		
Butchers & Poulters	1	1,543		
Grocery	4	27,159		
Off licences / Confectioners / Tobacconists / Newsagents	3	3,758		
Total	**10**	**34,853**		
Comparison Goods				
Footwear and Repair	4	5,091		
Mens and Boys Wear	0	0		
Womens, Girls, Children and General Wear	14	21,499		
Furniture, carpets & textiles	7	10,123		
Booksellers, arts, crafts, stationers, copy bureaux	7	6,846		
Electrical, gas, music & photographic	4	3,115		
DIY, hardware & housewares	2	2,404		
China, glass, fancy & leather goods	3	1,344		
Cars, motorcycles & motor accessories	2	4,149		
Chemists, drug stores & opticians	7	12,430		
Variety, department & catalogue	4	12,675		
Florists, nurserymen & seedsmen	2	1,626		
Toys, hobby, cycle & sports	4	3,363		
Jewellers & repair	3	4,065		
Other	10	8,625		
Total	**73**	**97,355**		
Service				
Restaurants, coffee bars, fast food & takeaways	23	29,344		
Pub / Club	9	24,126		
Hairdressers, beauty parlours & health centres	9	7,306		
Laundries and Dry Cleaners	1	1,083		
Travel Agents	3	4,797		
Banks, Building Societies and Financial Services	8	11,198		
Estate Agents and Valuers	6	4,723		
Professional Services	10	11,103		
Other (inlcuding Guest Houses, Hotels etc.)	27	70,991		
Total	**96**	**164,671**		
Distribution of Outlets by Size				
Under 1,000 sq ft.	149	52.28%		
Between 1,000 and 2,499 sq. ft.	105	36.84%		
Between 2,500 and 4,999 sq. ft.	22	7.72%		
Between 5,000 and 9,999 sq. ft.	7	2.46%		
Between 10,000 and 14,999 sq. ft.	0	0.00%		
Between 15,000 and 19,999 sq. ft.	1	0.35%		
Between 20,000 and 29,999 sq ft.	1	0.35%		
30,000 sq. ft. and above	0	0.00%		
Total	**285**	**100.00%**		



Bridgend County Retail Survey October 2005

PORTHCAWL TOWN CENTRE (NORTH)

Scale = 1:1500

Rhodri-Gwynn Jones
BSc., C.Eng., M.I.C.E.
Executive Director - Environment,
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Planning Services
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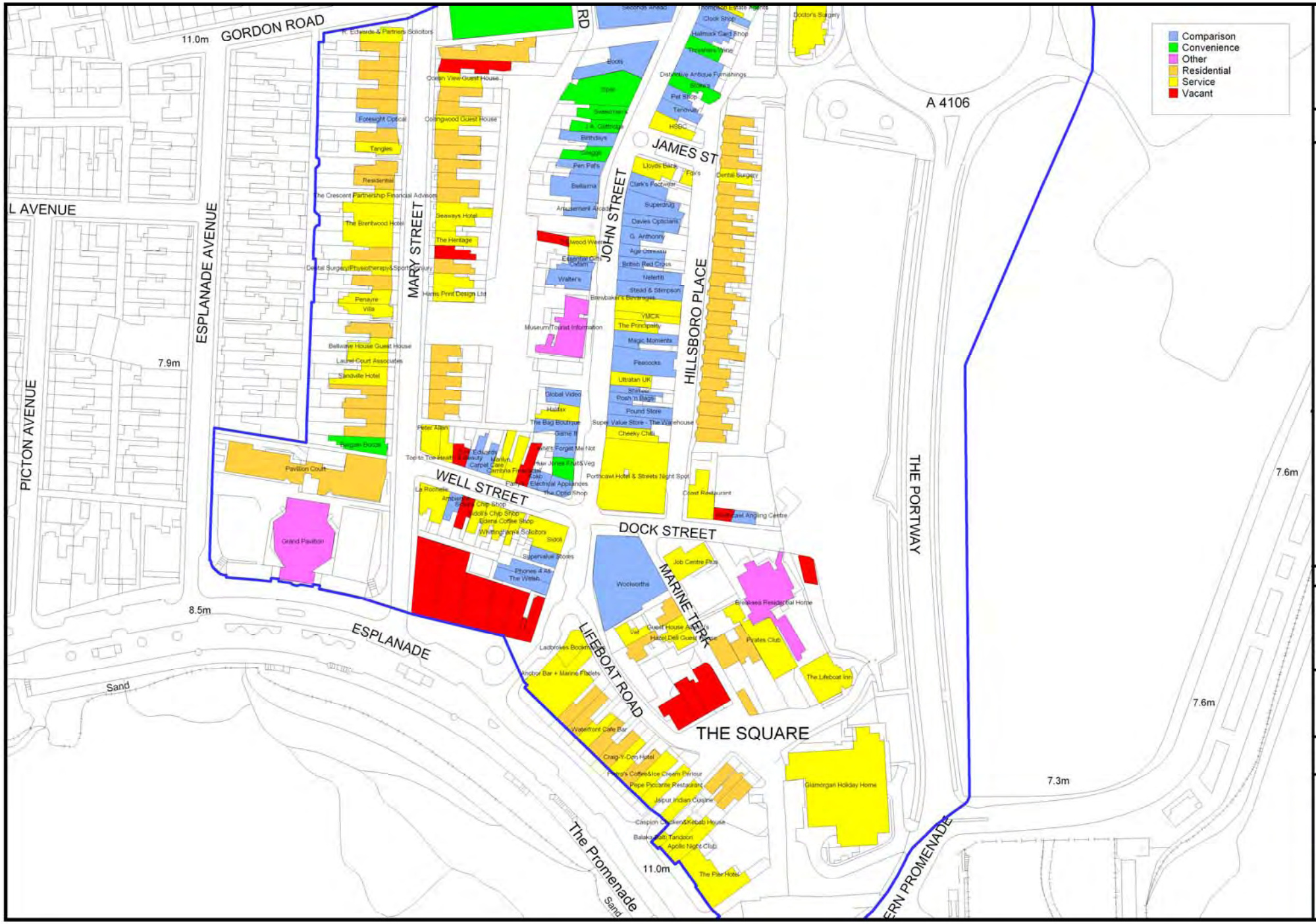
Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr
BRIDGEND County Borough Council



Bridgend County Retail Survey October 2005

PORTHCAWL TOWN CENTRE (SOUTH)

Scale = 1:1500

Rhodri-Gwynn Jones
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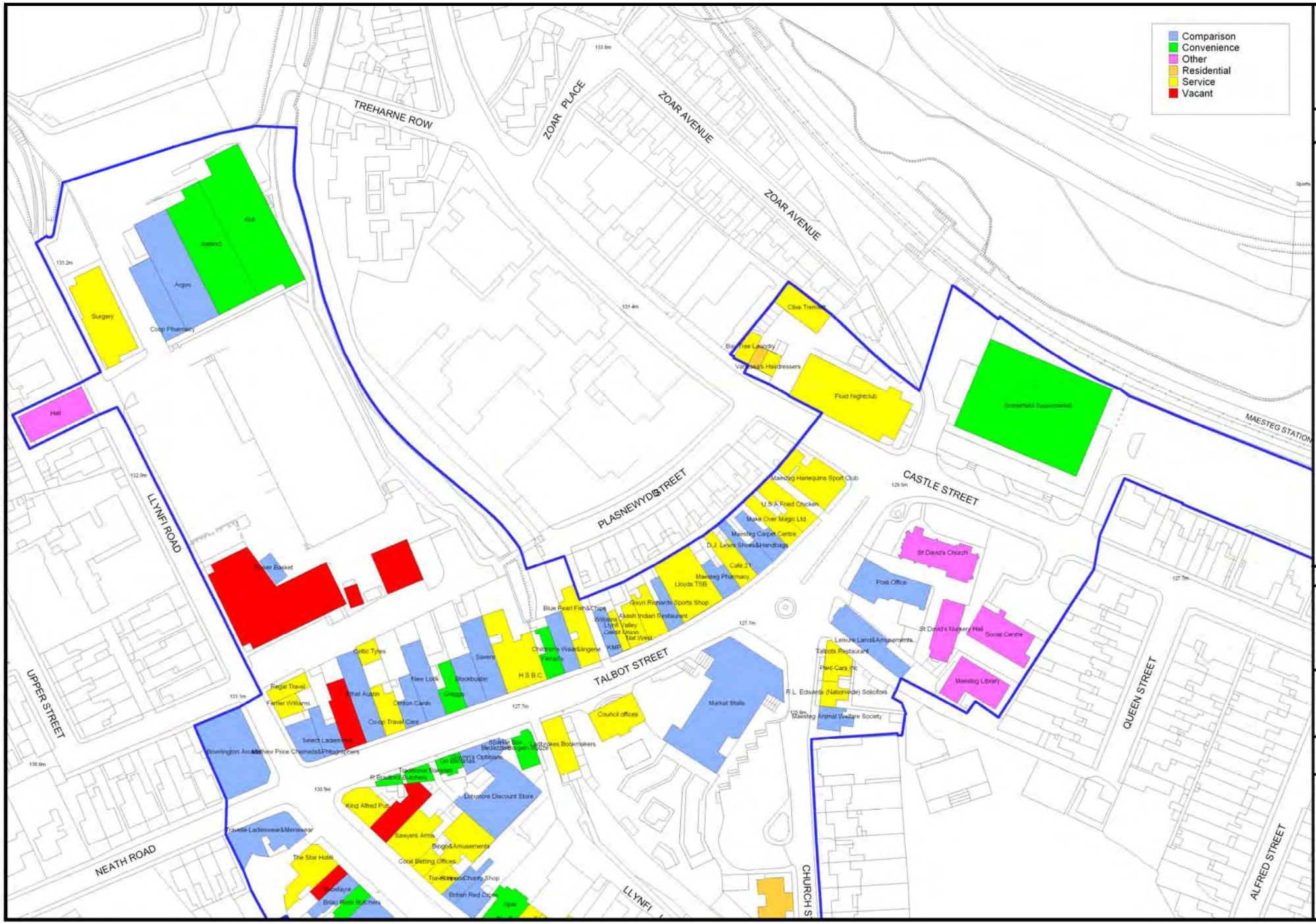
Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr
BRIDGEND County Borough Council

MAESTEG - 2005

	No. of Units	Area (sq. ft.)		% of Commercial Units
Total Properties Surveyed:	173	286,441		
Total Service / Convenience / Comparison / Vacant	151	258,894		
Total Other (includes Residential Properties & Community Facilities etc.)	22	27,547		
Total Vacant	16	29,630	Percentages are of Total Properties	10.60%
% Vacant	9.25%	10.34%		
Total Convenience	12	41,472		7.95%
% Convenience	6.94%	14.48%		
Total Comparison	60	99,850		39.74%
% Comparison	34.68%	34.86%		
Total Service	63	87,942		41.72%
% Service	36.42%	30.70%		
Convenience Goods				
Bakers and Confectioners	3	2,783		
Butchers & Poulters	2	1,330		
Grocery	5	35,960		
Off licences / Confectioners / Tobacconists / Newsagents	2	1,399		
Total	**12**	**41,472**		
Comparison Goods				
Footwear and Repair	4	4,716		
Mens and Boys Wear	1	1,801		
Womens, Girls, Children and General Wear	11	15,578		
Furniture, carpets & textiles	3	2,961		
Booksellers, arts, crafts, stationers, copy bureaux	2	2,347		
Electrical, gas, music & photographic	3	2,128		
DIY, hardware & housewares	4	4,600		
China, glass, fancy & leather goods	0	0		
Cars, motorcycles & motor accessories	0	0		
Chemists, drug stores & opticians	9	11,809		
Variety, department & catalogue	6	32,512		
Florists, nurserymen & seedsmen	2	1,265		
Toys, hobby, cycle & sports	4	4,795		
Jewellers & repair	2	520		
Other	9	14,818		
Total	**60**	**99,850**		
Service				
Restaurants, coffee bars, fast food & takeaways	17	17,798		
Pub / Club	9	23,433		
Hairdressers, beauty parlours & health centres	6	4,456		
Laundries and Dry Cleaners	1	645		
Travel Agents	3	2,686		
Banks, Building Societies and Financial Services	6	11,714		
Estate Agents and Valuers	3	3,405		
Professional Services	7	6,834		
Other	11	16,971		
Total	**63**	**87,942**		
Distribution of Outlets by Size				
Under 1,000 sq ft.	80	46.24%		
Between 1,000 and 2,499 sq. ft.	62	35.84%		
Between 2,500 and 4,999 sq. ft.	23	13.29%		
Between 5,000 and 9,999 sq. ft.	5	2.89%		
Between 10,000 and 14,999 sq. ft.	2	1.16%		
Between 15,000 and 19,999 sq. ft.	1	0.58%		
Between 20,000 and 29,999 sq ft.	0	0.00%		
30,000 sq. ft. and above	0	0.00%		
Total	**173**	**100.00%**		



Bridgend County Retail Survey October 2005

MAESTEG TOWN CENTRE (NORTH)

Scale = 1:1250

Rhodri-Gwynn Jones
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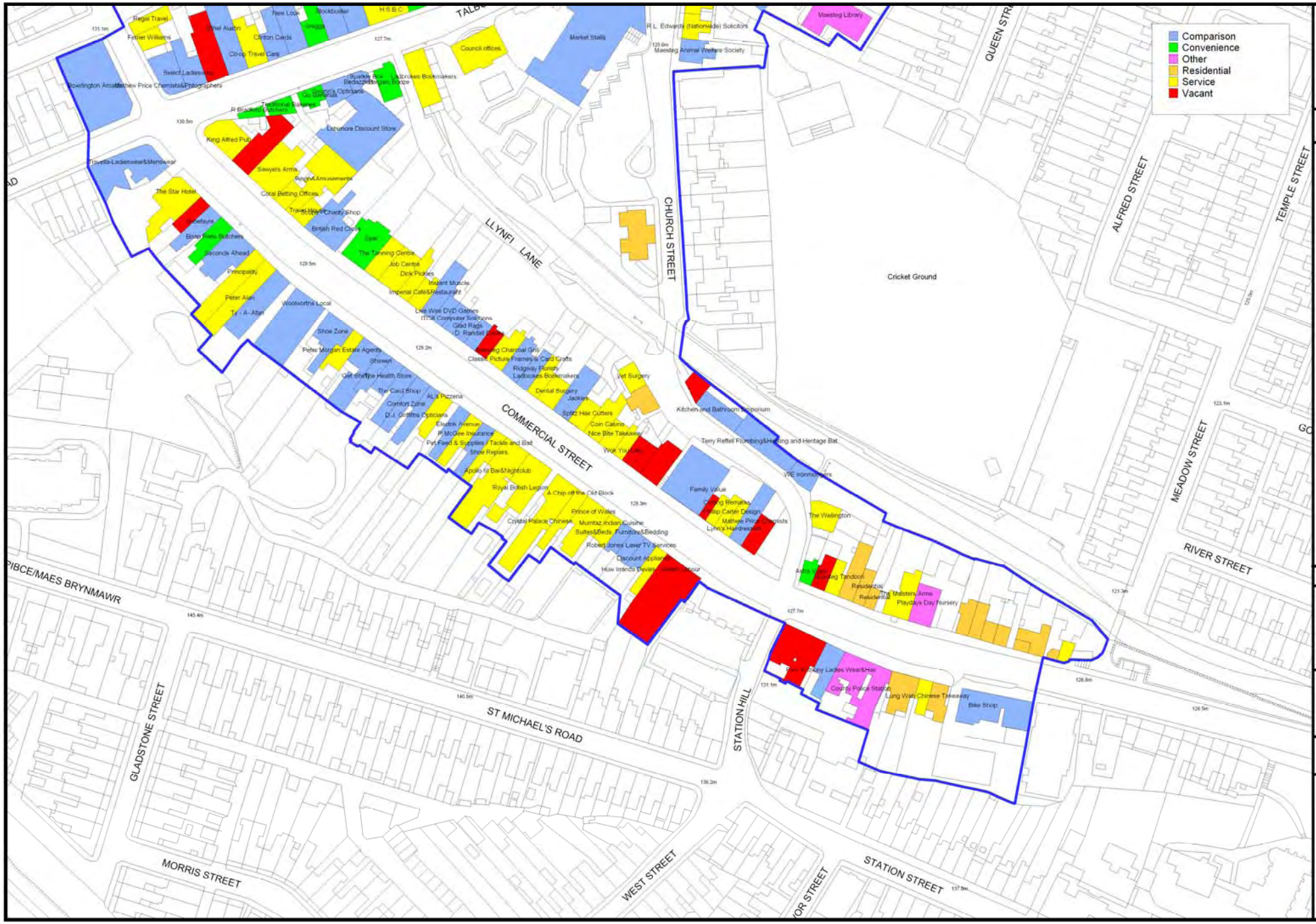
Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr
BRIDGEND County Borough Council


Comparison
Convenience
Other
Residential
Service
Vacant
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COMMERCIAL STREET
LLYNFI LANE
CHURCH STREET
QUEEN STREET
ALFRED STREET
TEMPLE STREET
MEADOW STREET
RIVER STREET
STATION HILL
STATION STREET
ST MICHAEL'S ROAD
GLADSTONE STREET
MORRIS STREET
WEST STREET
Cricket Ground
Market Stalls
Council offices
Maesteg Library
Maesteg Animal Welfare Society
R.L. Edwards (Nationwide) Solicitors
Regal Travel
Fetter Williams
Clinton Cards
Co-op Travel Care
Boots
New Look
Blockbuster
H.S.B.C.
Bowington Arcade
Mathew Price Chemists&Photographers
Sweet Ladieswear
Co Bargains
Brown's Opticians
Ladbrokes Bookmakers
Traditional Bakeries
Lefromore Discount Store
King Alfred Pub
Travelle-Ladieswear&Menswear
The Star Hotel
Sawyers Arms
Bingo&Amusements
Coral Betting Offices
Travel Mart Charity Shop
British Red Cross
Spar
The Tanning Centre
Job Centre
Dick Pickles
Instant Models
Imperial Cafe&Restaurant
Live Wire DVD Games
ITCA Computer Solutions
Glad Rags
D. Randall Butcher
Maesteg Charcoal Grill
Classic Picture Frames & Card Crafts
Ridgway Florists
Ladbrokes Bookmakers
Vet Surgery
Dental Surgery
Jackies
Spitz Hair Cutters
Coin Cafuine
Nice Bite Takeaway
Wok Your Way
Kitchen and Bathroom Emporium
Terry Reffell Plumbing&Heating and Heritage Bat
WE ironmongers
Family Value
Crazy Remedies
Philip Carter Design
Mathew Price Chemists
Lynn's Hairdressers
The Wellington
Aztec Cafe
Maesteg Tandoon
Residencia
The Malsters Arms
Playday's Day Nursery
Ben's Funky Ladies Wear&Hat
County Police Station
Lung Wah Chinese Takeaway
Bike Shop
Beverley Shoe Repairs
Peter Alan
Try-A-Man
Woolworths Local
Shoe Zone
Peter Morgan Estate Agents
Shawyn
Gift Shop
The Health Store
The Card Shop
ALA Pizzeria
Comfort Zone
D.J. Griffiths Opticians
Electric Avenue
P. McGee Insurance
Pet Food & Supplies / Tackle and Bait
Shoe Repairs
Apollo III Bar&Nightclub
Royal British Legion
A Chip off the Old Block
Prince of Wales
Crystal Palace Chinese
Mumtaz Indian Cuisine
Suites&Beds Furniture&Bedding
Robert Jones Laser TV Services
Discount Appliances
Huw Irranca Davies
Bridgend County Retail Survey
October 2005
MAESTEG TOWN CENTRE
(SOUTH)
Scale = 1:1250
Rhodri-Gwynn Jones
BSc., C.Eng., M.I.C.E.
Executive Director - Environment,
Bridgend County Borough Council, Civic Offices,
Angel Street,
Bridgend CF31 4WB.
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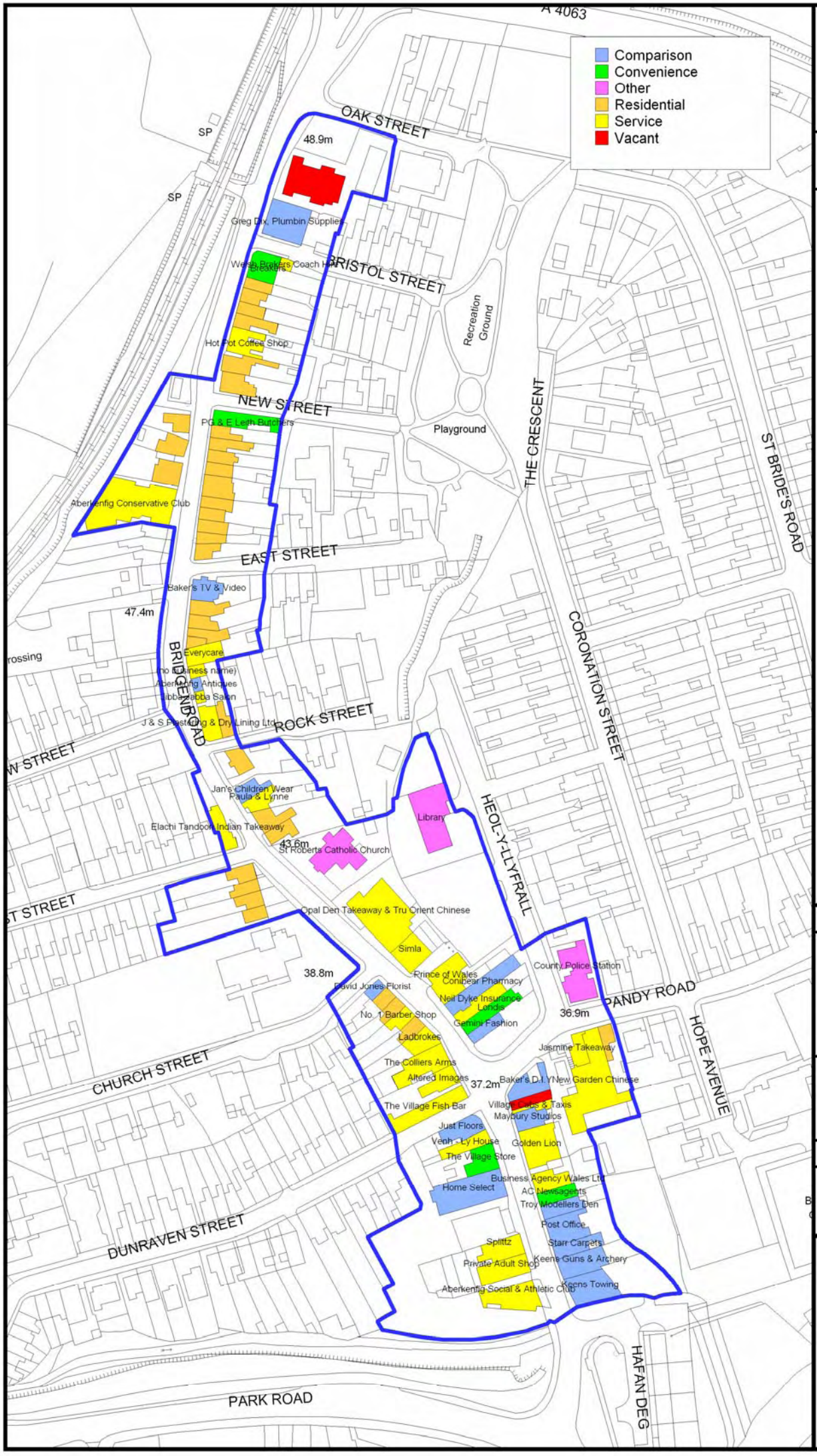
BRIDGEND
County Borough Council

ABERKENFIG - 2005

	No. of Units	Area (sq. ft.)
Total Properties Surveyed:	88	104,007
Total Service / Convenience / Comparison / Vacant	50	73,170
Total Other (includes Residential Properties & Community Facilities etc.)	38	30,837
Total Vacant	2	3,752
% Vacant	2.27%	3.61%
Total Convenience	5	6,073
% Convenience	5.68%	5.84%
Total Comparison	16	21,743
% Comparison	18.18%	20.91%
Total Service	27	41,602
% Service	30.68%	40.00%
Convenience Goods		
Bakers and Confectioners	0	0
Butchers & Poulters	1	1,455
Grocery	3	3,753
Off licences / Confectioners / Tobacconists / Newsagents	1	865
Total	**5**	**6,073**
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	5,815
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	2	1,969
DIY, hardware & housewares	2	3,668
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	1	1,961
Variety, department & catalogue	0	0
Florists, nurserymen & seedsmen	1	376
Toys, hobby, cycle & sports	3	4,851
Jewellers & repair	0	0
Other	1	1,682
Total	**16**	**21,743**
Service		
Restaurants, coffee bars, fast food & takeaways	8	16,691
Pub / Club	5	13,280
Hairdressers, beauty parlours & health centres	4	3,144
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	3	3,309
Estate Agents and Valuers	0	0
Professional Services	2	572
Other	5	4,606
Total	**27**	**41,602**
Distribution of Outlets by Size		
Under 1,000 sq ft.	51	57.95%
Between 1,000 and 2,499 sq. ft.	31	35.23%
Between 2,500 and 4,999 sq. ft.	4	4.55%
Between 5,000 and 9,999 sq. ft.	2	2.27%
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	**88**	**100.00%**

Percentages are of Total Properties



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Bridgend County Retail Survey October 2005

ABERKENFIG

Scale = 1:2000

Rhodri-Gwynn Jones
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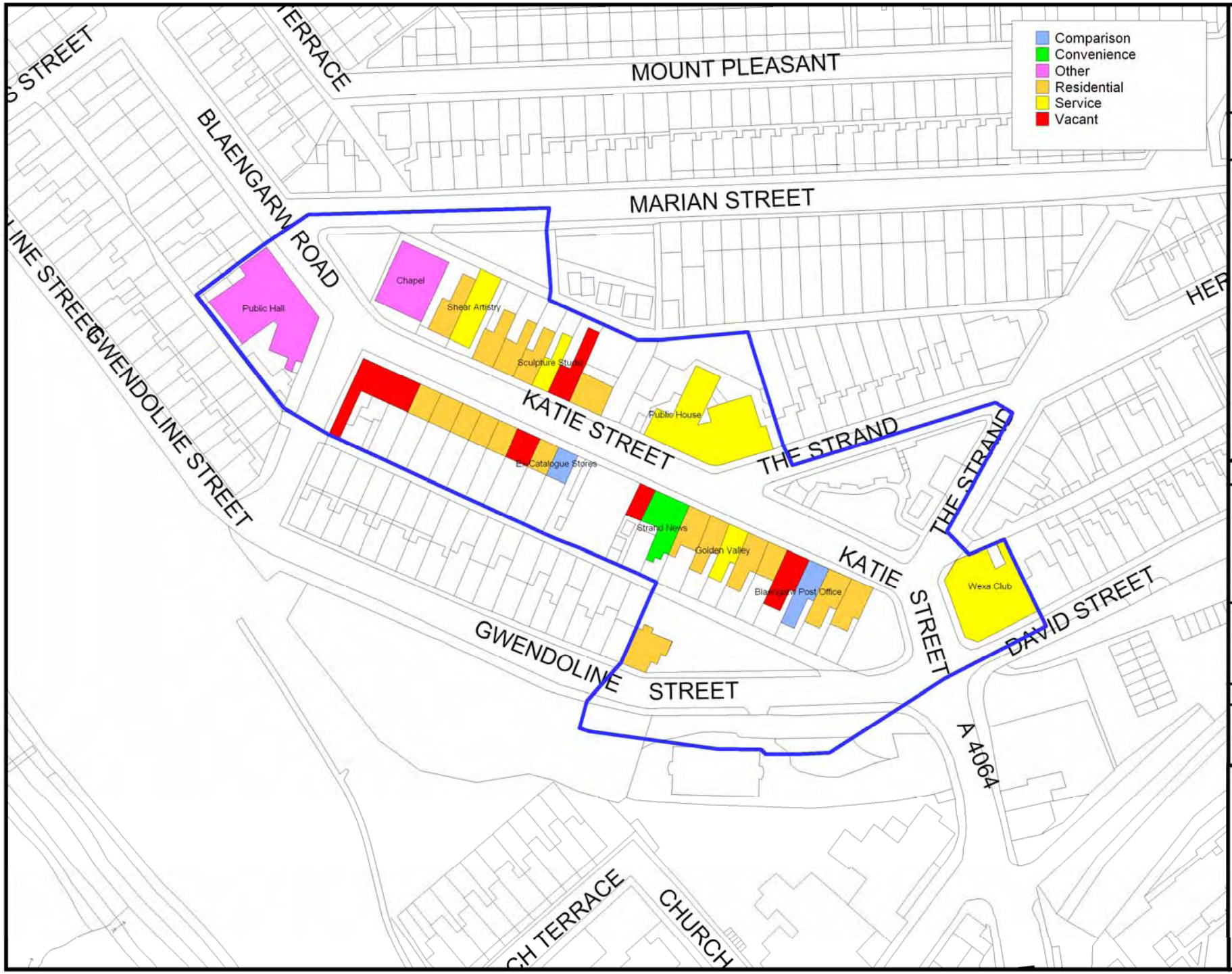
BRIDGEND
County Borough Council

BLAENGARW - 2005

	No. of Units	Area (sq. ft.)	
Total Properties Surveyed:	33	35,225	
Total Service / Convenience / Comparison / Vacant	13	17,360	
Total Other (includes Residential Properties & Community Facilities etc.)	20	17,865	
Total Vacant	5	4,286	Percentages are of Total Properties
% Vacant	15.15%	12.17%	
Total Convenience	1	1,203	
% Convenience	3.03%	3.42%	
Total Comparison	2	1,278	
% Comparison	6.06%	3.63%	
Total Service	5	10,593	
% Service	15.15%	30.07%	
Convenience Goods			
Bakers and Confectioners	0	0	
Butchers & Poulters	0	0	
Grocery	0	0	
Off licences / Confectioners / Tobacconists / Newsagents	1	1,203	
Total	**1**	**1,203**	
Comparison Goods			
Footwear and Repair	0	0	
Mens and Boys Wear	1	436	
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	842	
Total	**2**	**1,278**	
Service			
Restaurants, coffee bars, fast food & takeaways	1	673	
Pub / Club	2	8,202	
Hairdressers, beauty parlours & health centres	1	1,150	
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	568	
Total	**5**	**10,593**	
Distribution of Outlets by Size			
Under 1,000 sq ft.	26	78.79%	
Between 1,000 and 2,499 sq. ft.	4	12.12%	
Between 2,500 and 4,999 sq. ft.	3	9.09%	
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	**33**	**100.00%**	



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Bridgend County
Retail Survey
October 2005

BLAENGARW

Scale = 1:1250

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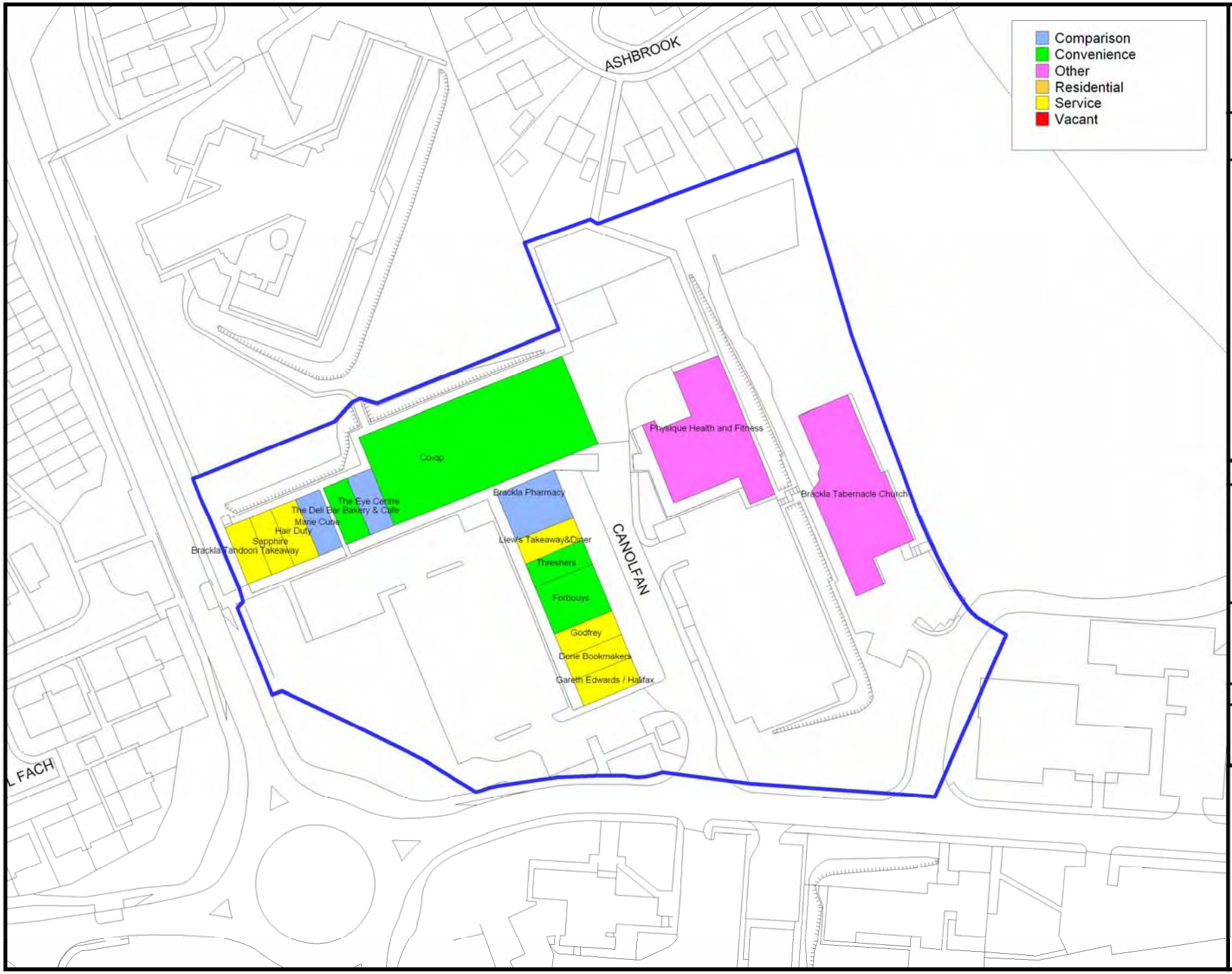
Cyngor Bwrdeistref Sirol
Pen-y-bont ar Ogwr
BRIDGEND
County Borough Council

BRACKLA - 2005

	No. of Units	Area (sq. ft.)	
Total Properties Surveyed:	16	44,180	
Total Service / Convenience / Comparison / Vacant	14	29,685	
Total Other (includes Residential Properties & Community Facilities etc.)	2	14,495	
Total Vacant	0	0	Percentages are of Total Properties
% Vacant	0.00%	0.00%	
Total Convenience	4	18,130	
% Convenience	25.00%	41.04%	
Total Comparison	3	4,209	
% Comparison	18.75%	9.53%	
Total Service	7	7,346	
% Service	43.75%	16.63%	
Convenience Goods			
Bakers and Confectioners	1	1,060	
Butchers & Poulters	0	0	
Grocery	1	13,915	
Off licences / Confectioners / Tobacconists / Newsagents	2	3,155	
Total	**4**	**18,130**	
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	3,167	
Variety, department & catalogue	0	0	
Florists, nurserymen & seedsmen	0	0	
Toys, hobby, cycle & sports	0	0	
Jewellers & repair	0	0	
Other	1	1,042	
Total	**3**	**4,209**	
Service			
Restaurants, coffee bars, fast food & takeaways	3	3,146	
Pub / Club	0	0	
Hairdressers, beauty parlours & health centres	1	1,093	
Laundries and Dry Cleaners	1	963	
Travel Agents	0	0	
Banks, Building Societies and Financial Services	0	0	
Estate Agents and Valuers	1	1,125	
Professional Services	0	0	
Other	1	1,019	
Total	**7**	**7,346**	
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%**	



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Bridgend County
Retail Survey
October 2005

BRACKLA

Scale = 1:1250

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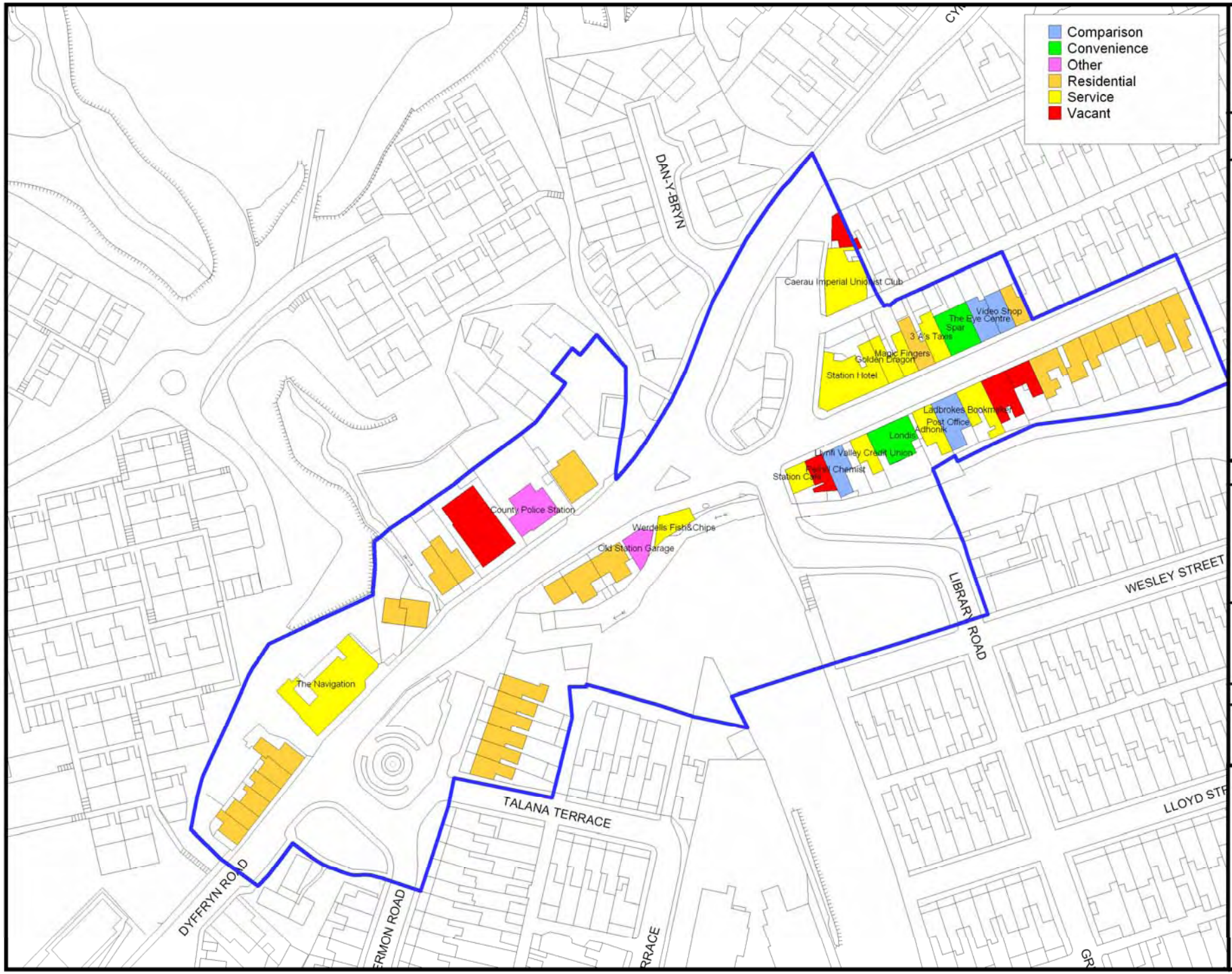
Cyngor Bwrdeistref Sirol
Pen-y-bont ar Ogwr
BRIDGEND
County Borough Council

CAERAU - 2005

	No. of Units	Area (sq. ft.)
Total Properties Surveyed:	54	48,636
Total Service / Convenience / Comparison / Vacant	22	26,803
Total Other (includes Residential Properties & Community Facilities etc.)	32	21,833
Total Vacant	5	5,758
% Vacant	9.26%	11.84%
Total Convenience	2	2,868
% Convenience	3.70%	5.90%
Total Comparison	4	3,540
% Comparison	7.41%	7.28%
Total Service	11	14,637
% Service	20.37%	30.09%
Convenience Goods		
Bakers and Confectioners	0	0
Butchers & Poulters	0	0
Grocery	2	2,868
Off licences / Confectioners / Tobacconists / Newsagents	0	0
Total	**2**	**2,868**
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	1,659
Variety, department & catalogue	0	0
Florists, nurserymen & seedsmen	0	0
Toys, hobby, cycle & sports	0	0
Jewellers & repair	0	0
Other	2	1,881
Total	**4**	**3,540**
Service		
Restaurants, coffee bars, fast food & takeaways	4	2,806
Pub / Club	3	8,701
Hairdressers, beauty parlours & health centres	1	587
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	1	617
Estate Agents and Valuers	0	0
Professional Services	2	1,473
Other	0	453
Total	**11**	**14,637**
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%**

Percentages are of Total Properties



Bridgend County
Retail Survey
October 2005

CAERAU

Scale = 1:500

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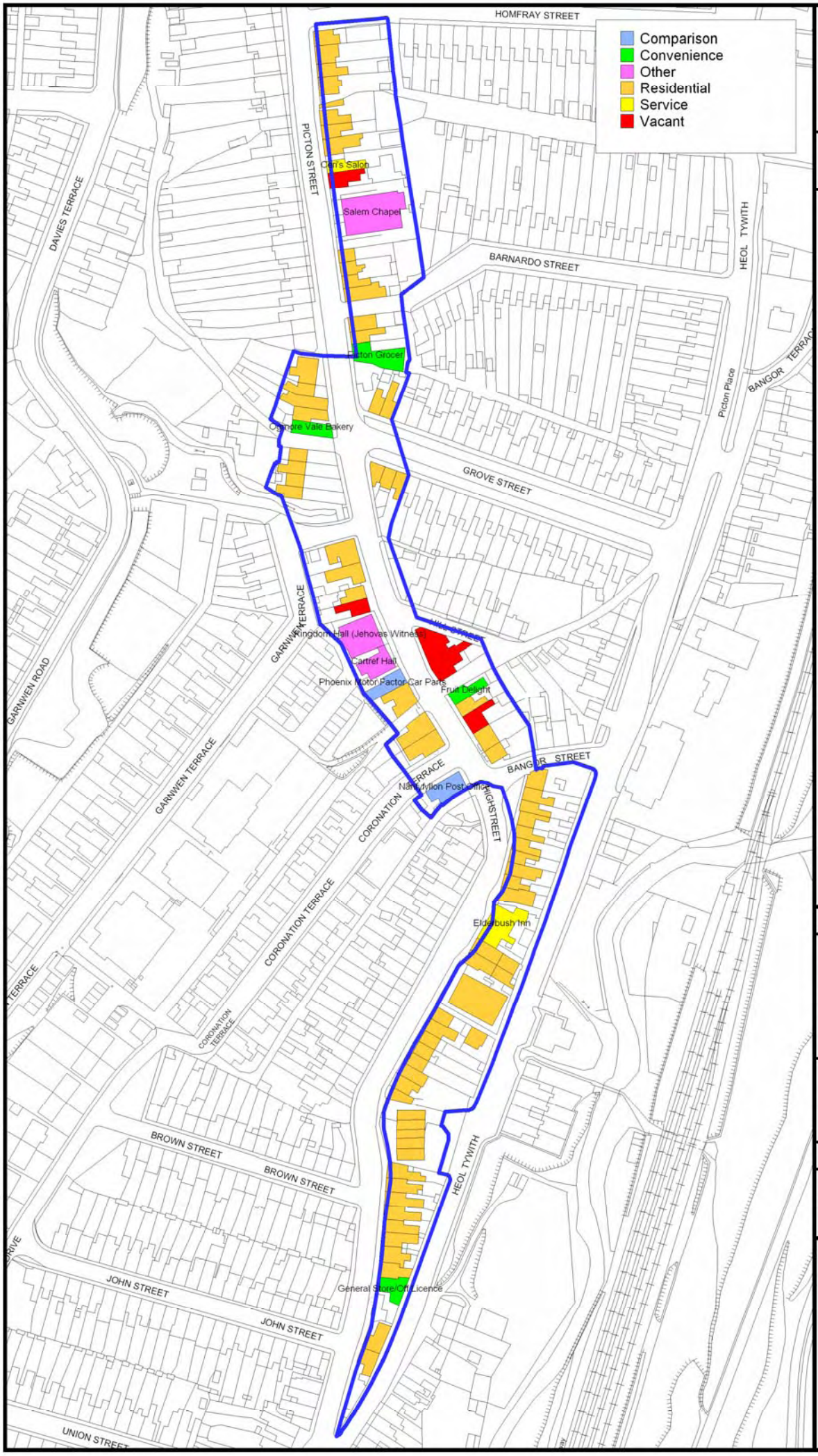
Pen-y-bont ar Ogwr
BRIDGEND
County Borough Council

NANTYFFYLLON - 2005

	No. of Units	Area (sq. ft.)	
Total Properties Surveyed:	90	65,841	
Total Service / Convenience / Comparison / Vacant	12	13,152	
Total Other (includes Residential Properties & Community Facilities etc.)	78	52,689	
Total Vacant	4	4,477	Percentages are of Total Properties
% Vacant	4.44%	6.80%	
Total Convenience	4	4,089	
% Convenience	4.44%	6.21%	
Total Comparison	2	2,064	
% Comparison	2.22%	3.13%	
Total Service	2	2,522	
% Service	2.22%	3.83%	
Convenience Goods			
Bakers and Confectioners	1	843	
Butchers & Poulters	0	0	
Grocery	2	2,308	
Off licences / Confectioners / Tobacconists / Newsagents	1	938	
Total	**4**	**4,089**	
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	911	
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	1,153	
Total	**2**	**2,064**	
Service			
Restaurants, coffee bars, fast food & takeaways	0	0	
Pub / Club	1	1,884	
Hairdressers, beauty parlours & health centres	1	638	
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**	**2,522**	
Distribution of Outlets by Size			
Under 1,000 sq ft.	78	86.67%	
Between 1,000 and 2,499 sq. ft.	10	11.11%	
Between 2,500 and 4,999 sq. ft.	2	2.22%	
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	**90**	**100.00%**	



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Bridgend County
Retail Survey
October 2005

NANTYFFYLLON

Scale = 1:2000

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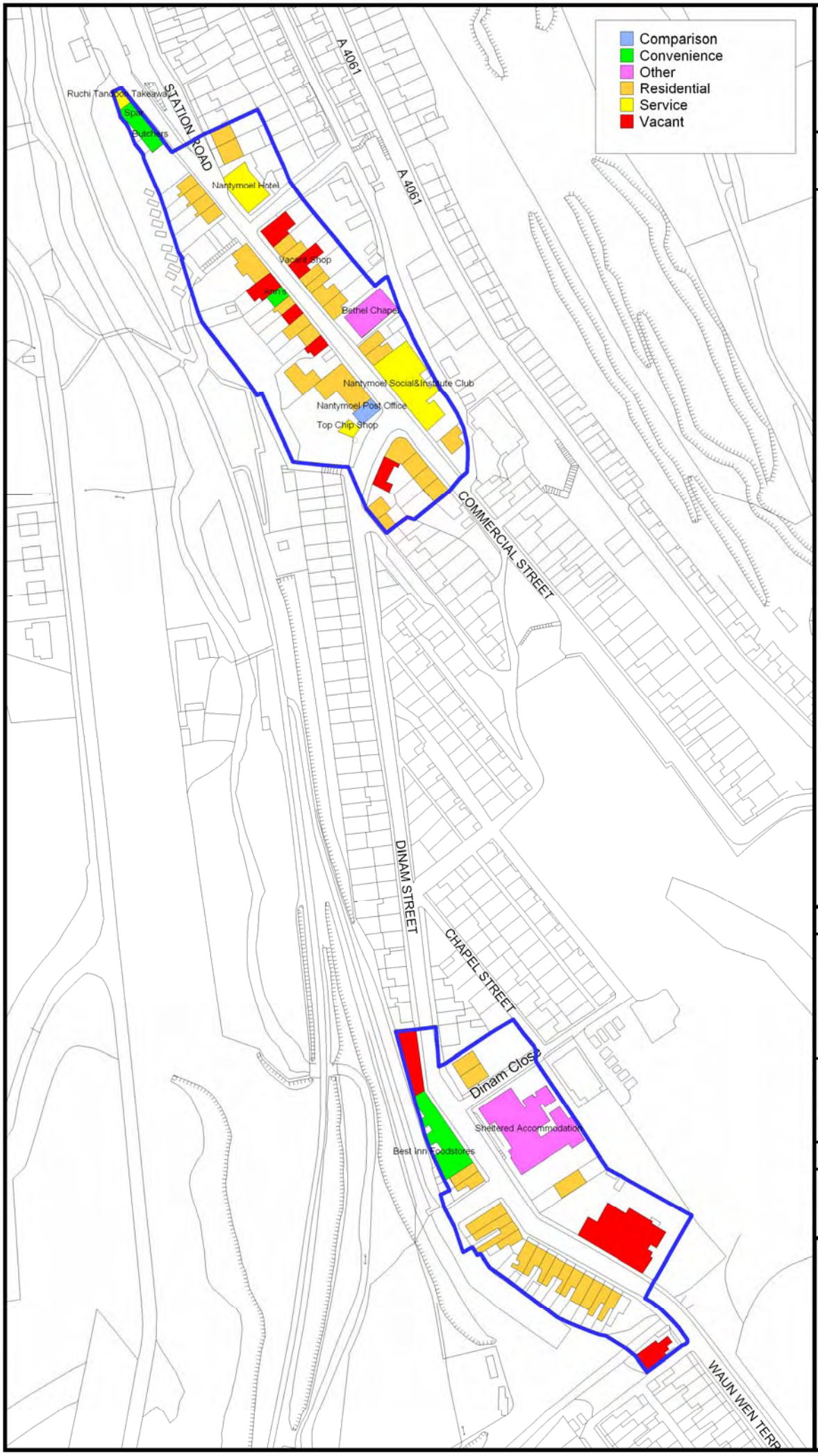
County Borough Council

NANTYMOEL - 2005

	No. of Units	Area (sq. ft.)
Total Properties Surveyed:	125	134,759
Total Service / Convenience / Comparison / Vacant	39	52,789
Total Other (includes Residential Properties & Community Facilities etc.)	86	81,970
Total Vacant	16	21,998
% Vacant	12.80%	16.32%
Total Convenience	5	7,459
% Convenience	4.00%	5.54%
Total Comparison	6	4,635
% Comparison	4.80%	3.44%
Total Service	12	18,697
% Service	9.60%	13.87%

Percentages are of Total Properties

Convenience Goods		
Bakers and Confectioners	0	0
Butchers & Poulters	1	563
Grocery	3	6,418
Off licences / Confectioners / Tobacconists / Newsagents	1	478
Total	**5**	**7,459**
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	1	898
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	1	681
Variety, department & catalogue	1	832
Florists, nurserymen & seedsmen	0	0
Toys, hobby, cycle & sports	0	0
Jewellers & repair	1	598
Other	2	1,626
Total	**6**	**4,635**
Service		
Restaurants, coffee bars, fast food & takeaways	4	1,998
Pub / Club	3	11,930
Hairdressers, beauty parlours & health centres	1	395
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	2	1,438
Other	2	2,936
Total	**12**	**18,697**
Distribution of Outlets by Size		
Under 1,000 sq ft.	100	80.00%
Between 1,000 and 2,499 sq. ft.	15	12.00%
Between 2,500 and 4,999 sq. ft.	5	4.00%
Between 5,000 and 9,999 sq. ft.	5	4.00%
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	**125**	**100.00%**



Bridgend County
Retail Survey
October 2005

NANTYMOEL (NORTH & CENTRAL)

Scale = 1:2250

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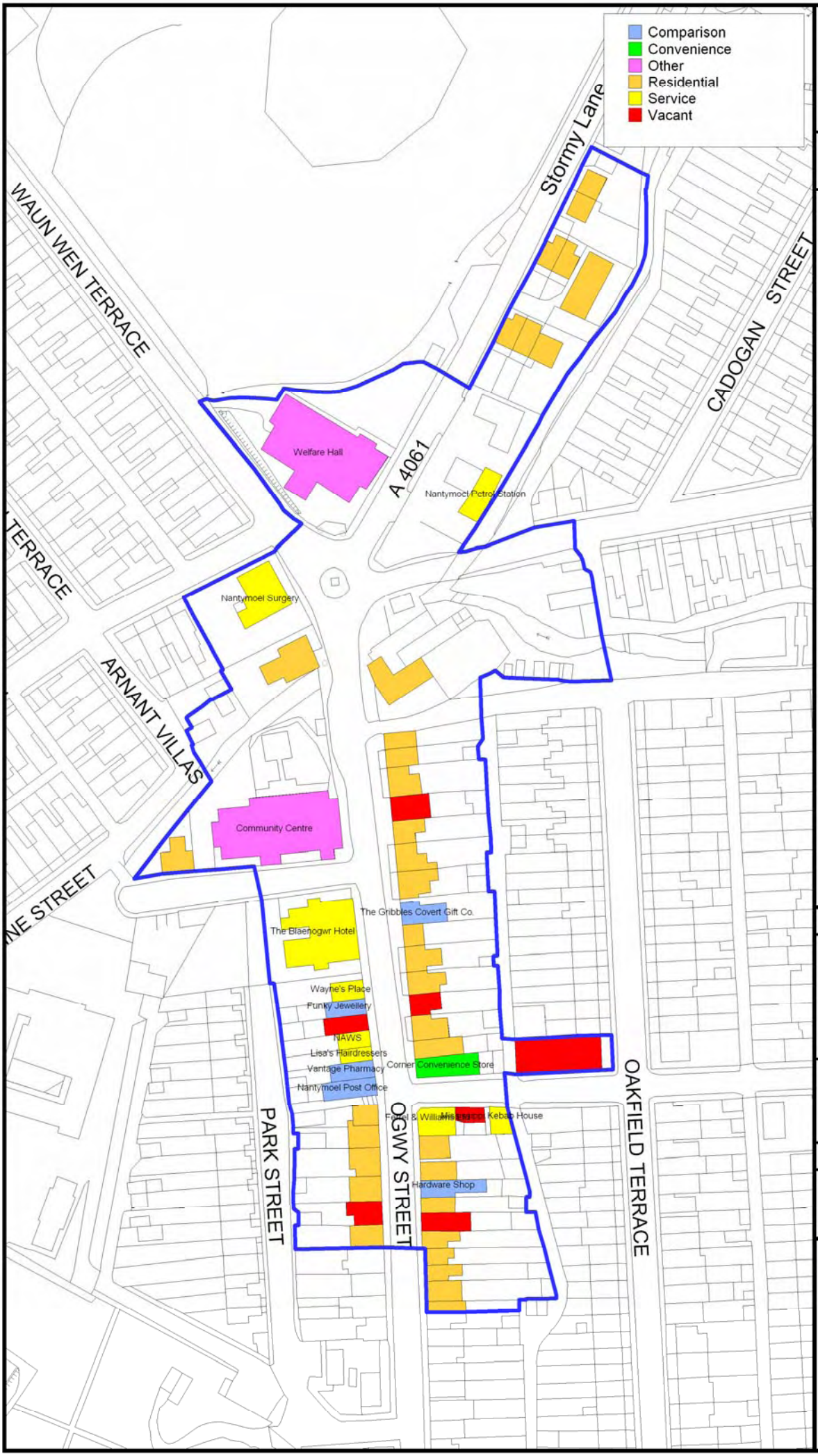

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Bridgend County
Retail Survey
October 2005

NANTYMOEL (SOUTH)

Scale = 1:1500

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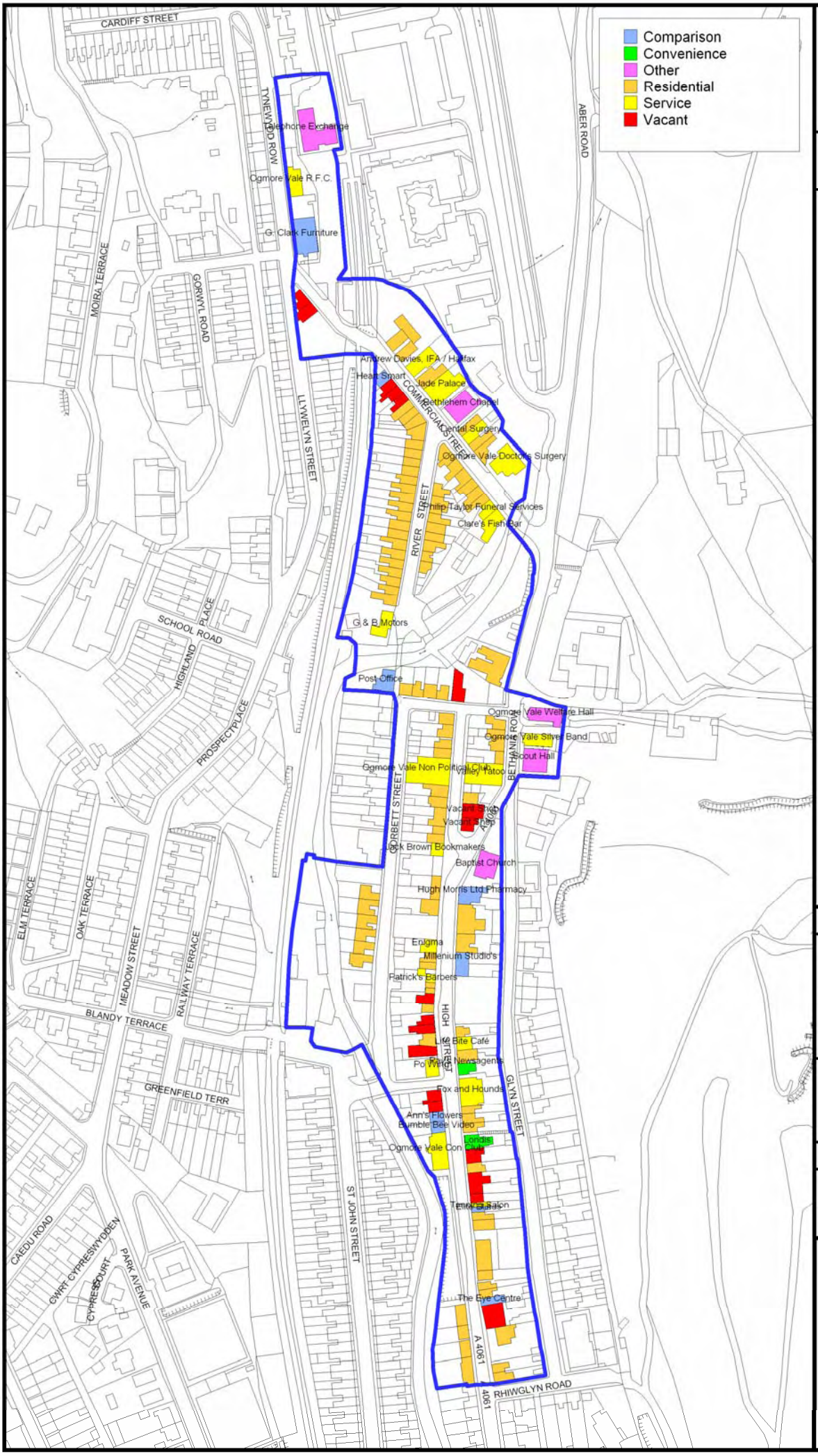
BRIDGEND
County Borough Council

OGMORE VALE - 2005

	No. of Units	Area (sq. ft.)
Total Properties Surveyed:	153	138,417
Total Service / Convenience / Comparison / Vacant	48	55,550
Total Other (includes Residential Properties & Community Facilities etc.)	105	82,867
Total Vacant	18	14,940
% Vacant	11.76%	10.79%
Total Convenience	2	1,844
% Convenience	1.31%	1.33%
Total Comparison	9	9,594
% Comparison	5.88%	6.93%
Total Service	19	29,172
% Service	12.42%	21.08%

Percentages are of Total Properties

Convenience Goods		
Bakers and Confectioners	0	0
Butchers & Poulters	0	0
Grocery	1	1,175
Off licences / Confectioners / Tobacconists / Newsagents	1	669
Total	**2**	**1,844**
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	1	587
Furniture, carpets & textiles	2	3,227
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	1	1,116
DIY, hardware & housewares	0	0
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	2	2,203
Variety, department & catalogue	0	0
Florists, nurserymen & seedsmen	1	519
Toys, hobby, cycle & sports	0	0
Jewellers & repair	0	0
Other	2	1,942
Total	**9**	**9,594**
Service		
Restaurants, coffee bars, fast food & takeaways	4	5,764
Pub / Club	4	10,090
Hairdressers, beauty parlours & health centres	3	1,601
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	1	1,668
Estate Agents and Valuers	0	0
Professional Services	3	4,914
Other	4	5,135
Total	**19**	**29,172**
Distribution of Outlets by Size		
Under 1,000 sq ft.	117	76.47%
Between 1,000 and 2,499 sq. ft.	30	19.61%
Between 2,500 and 4,999 sq. ft.	6	3.92%
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	**153**	**100.00%**



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Bridgend County
Retail Survey
October 2005

OGMORE VALE

Scale = 1:3000

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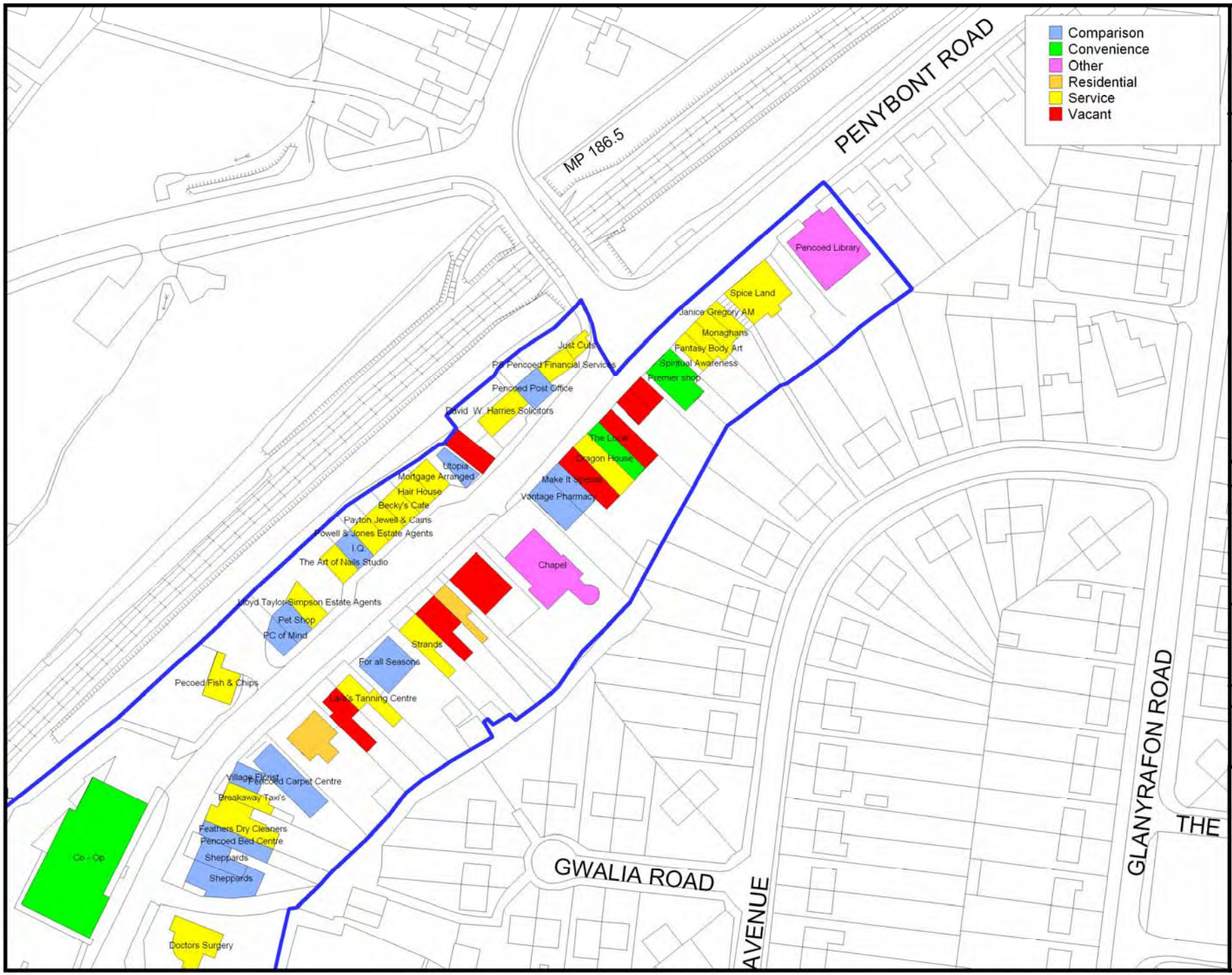
Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr
BRIDGEND County Borough Council

PENCOED - 2005

	No. of Units	Area (sq. ft.)
Total Properties Surveyed:	89	88,891
Total Service / Convenience / Comparison / Vacant	71	67,351
Total Other (includes Residential Properties & Community Facilities etc.)	18	21,540
Total Vacant	9	7,283
% Vacant	10.11%	8.19%
Total Convenience	6	10,518
% Convenience	6.74%	11.83%
Total Comparison	17	13,030
% Comparison	19.10%	14.66%
Total Service	39	36,520
% Service	43.82%	41.08%

Percentages are of Total Properties

Convenience Goods		
Bakers and Confectioners	0	0
Butchers & Poulters	1	306
Grocery	2	7,917
Off licences / Confectioners / Tobacconists / Newsagents	3	2,295
Total	**6**	**10,518**
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	1	483
Furniture, carpets & textiles	3	3,173
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	1	396
DIY, hardware & housewares	2	1,934
China, glass, fancy & leather goods	2	1,126
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	3	3,087
Variety, department & catalogue	1	645
Florists, nurserymen & seedsmen	2	1,051
Toys, hobby, cycle & sports	1	540
Jewellers & repair	0	0
Other	1	595
Total	**17**	**13,030**
Service		
Restaurants, coffee bars, fast food & takeaways	8	8,140
Pub / Club	3	7,405
Hairdressers, beauty parlours & health centres	8	4,163
Laundries and Dry Cleaners	1	1,148
Travel Agents	0	0
Banks, Building Societies and Financial Services	4	3,303
Estate Agents and Valuers	4	2,021
Professional Services	4	2,423
Other	7	7,917
Total	**39**	**36,520**
Distribution of Outlets by Size		
Under 1,000 sq ft.	63	70.79%
Between 1,000 and 2,499 sq. ft.	23	25.84%
Between 2,500 and 4,999 sq. ft.	2	2.25%
Between 5,000 and 9,999 sq. ft.	1	1.12%
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	**89**	**100.00%**



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Bridgend County
Retail Survey
October 2005

PENCOED (NORTH)

Scale = 1:1250

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A4 Portrait

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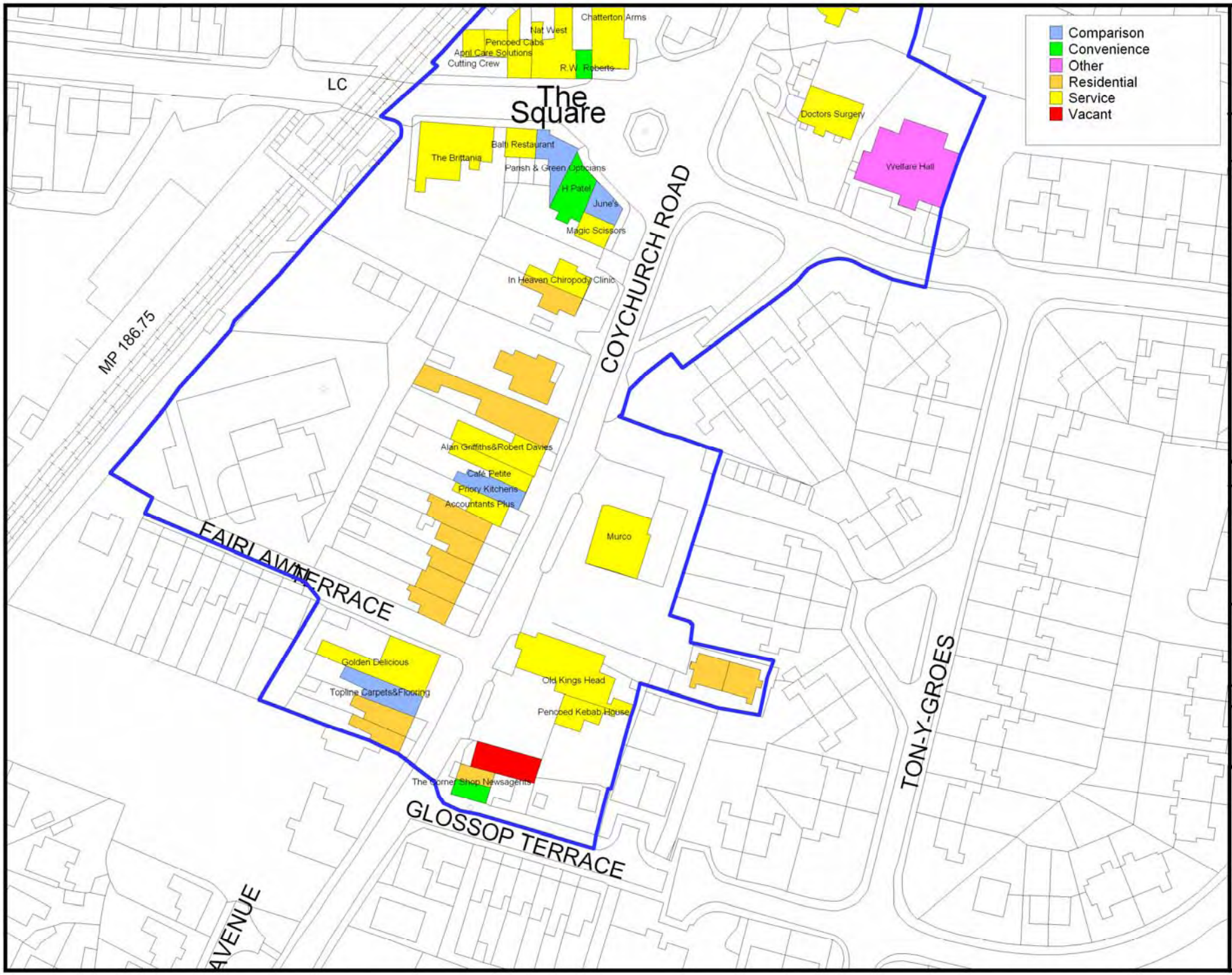
Pen-y-bont ar Ogwr
BRIDGEND
County Borough Council



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Retail Survey
October 2005

PENCOED (SOUTH)

Scale = 1:1250

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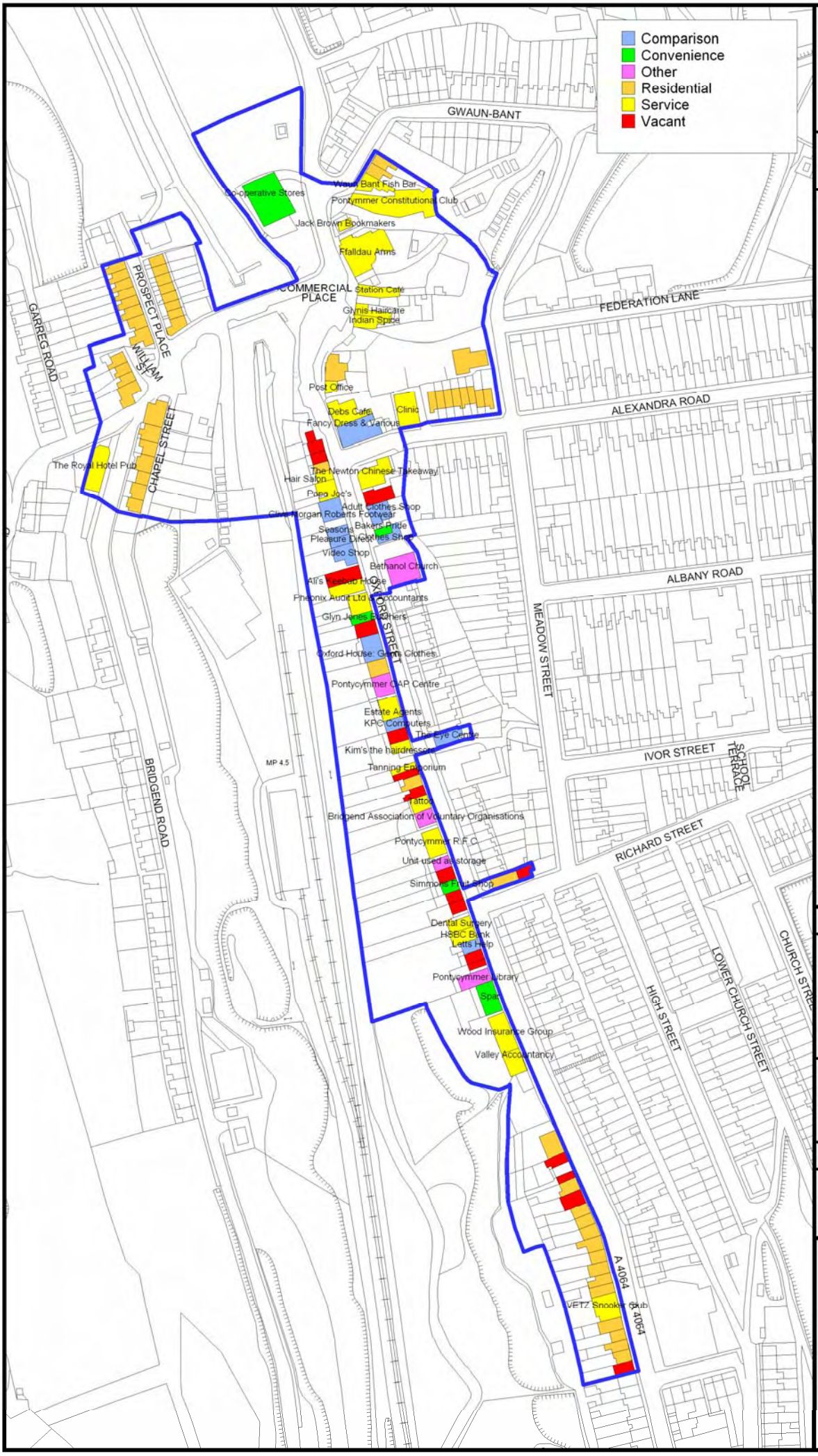
Cyngor Bwrdeistref Sirol
Pen-y-bont ar Ogwr
BRIDGEND
County Borough Council

PONTYCYMMER - 2005

	No. of Units	Area (sq. ft.)	
Total Properties Surveyed:	123	98,229	
Total Service / Convenience / Comparison / Vacant	61	60,525	
Total Other (includes Residential Properties & Community Facilities etc.)	62	37,704	
Total Vacant	19	10,776	Percentages are of Total Properties
% Vacant	15.45%	10.97%	
Total Convenience	5	6,876	
% Convenience	4.07%	7.00%	
Total Comparison	11	10,115	
% Comparison	8.94%	10.30%	
Total Service	26	32,758	
% Service	21.14%	33.35%	
Convenience Goods			
Bakers and Confectioners	1	342	
Butchers & Poulters	1	526	
Grocery	3	6,008	
Off licences / Confectioners / Tobacconists / Newsagents	0	0	
Total	**5**	**6,876**	
Comparison Goods			
Footwear and Repair	1	1,161	
Mens and Boys Wear	1	1,243	
Womens, Girls, Children and General Wear	2	1,622	
Furniture, carpets & textiles	0	0	
Booksellers, arts, crafts, stationers, copy bureaux	2	1,012	
Electrical, gas, music & photographic	1	572	
DIY, hardware & housewares	0	0	
China, glass, fancy & leather goods	0	0	
Cars, motorcycles & motor accessories	0	0	
Chemists, drug stores & opticians	1	864	
Variety, department & catalogue	1	2,125	
Florists, nurserymen & seedsmen	0	0	
Toys, hobby, cycle & sports	0	0	
Jewellers & repair	0	0	
Other	2	1,516	
Total	**11**	**10,115**	
Service			
Restaurants, coffee bars, fast food & takeaways	7	8,309	
Pub / Club	4	11,285	
Hairdressers, beauty parlours & health centres	5	2,675	
Laundries and Dry Cleaners	0	0	
Travel Agents	0	0	
Banks, Building Societies and Financial Services	4	4,660	
Estate Agents and Valuers	1	1,088	
Professional Services	0	0	
Other	5	4,741	
Total	**26**	**32,758**	
Distribution of Outlets by Size			
Under 1,000 sq ft.	94	76.42%	
Between 1,000 and 2,499 sq. ft.	26	21.14%	
Between 2,500 and 4,999 sq. ft.	3	2.44%	
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	**123**	**100.00%**	



Bridgend County Retail Survey October 2005

PONTYCYMMER

Scale = 1:2500

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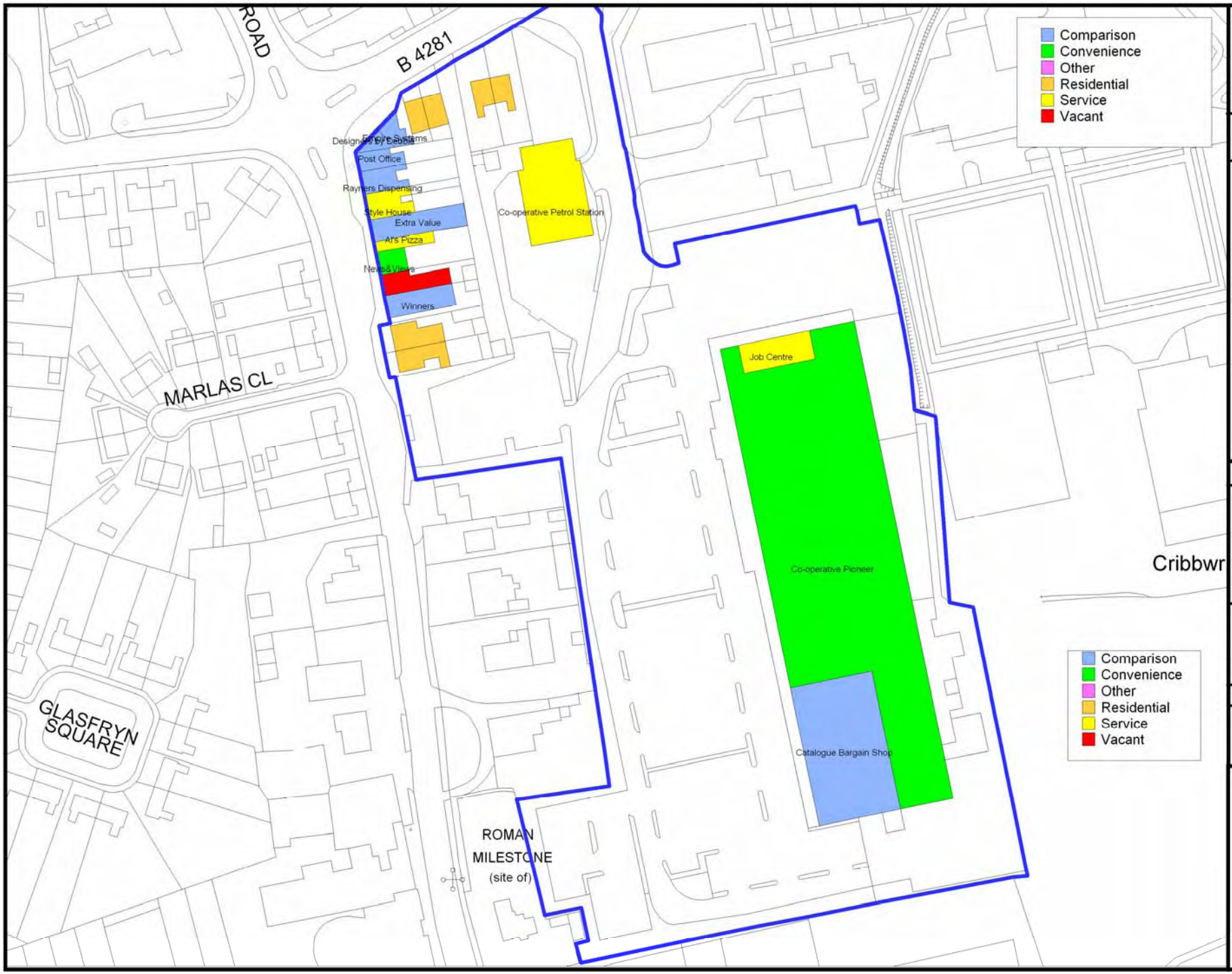
Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr
BRIDGEND County Borough Council

Pyle / Kenfig Hill - 2005

	No. of Units	Area (sq. ft.)
Total Properties Surveyed:	202	229,473
Total Service / Convenience / Comparison / Vacant	65	130,200
Total Other (includes Residential Properties & Community Facilities etc.)	137	99,273
Total Vacant	11	13,372
% Vacant	5.45%	5.83%
Total Convenience	7	57,438
% Convenience	3.47%	25.03%
Total Comparison	23	29,515
% Comparison	11.39%	12.86%
Total Service	24	29,875
% Service	11.88%	13.02%
Convenience Goods		
Bakers and Confectioners	1	894
Butchers & Poulters	1	657
Grocery	2	53,324
Off licences / Confectioners / Tobacconists / Newsagents	3	2,563
Total	**7**	**57,438**
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	2	1,802
Furniture, carpets & textiles	2	1,173
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	6	3,952
DIY, hardware & housewares	0	0
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	4	3,034
Variety, department & catalogue	3	13,756
Florists, nurserymen & seedsmen	1	862
Toys, hobby, cycle & sports	3	3,077
Jewellers & repair	0	0
Other	2	1,859
Total	**23**	**29,515**
Service		
Restaurants, coffee bars, fast food & takeaways	6	4,960
Pub / Club	1	4,602
Hairdressers, beauty parlours & health centres	3	2,596
Laundries and Dry Cleaners	0	0
Travel Agents	1	844
Banks, Building Societies and Financial Services	3	2,978
Estate Agents and Valuers	3	1,966
Professional Services	4	3,233
Other	3	8,696
Total	**24**	**29,875**
Distribution of Outlets by Size		
Under 1,000 sq ft.	172	85.15%
Between 1,000 and 2,499 sq. ft.	23	11.39%
Between 2,500 and 4,999 sq. ft.	4	1.98%
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	**202**	**100.00%**

Percentages are of Total Properties



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Bridgend County Retail Survey October 2005

PYLE/KENFIG HILL (WEST)

Scale = 1:1500

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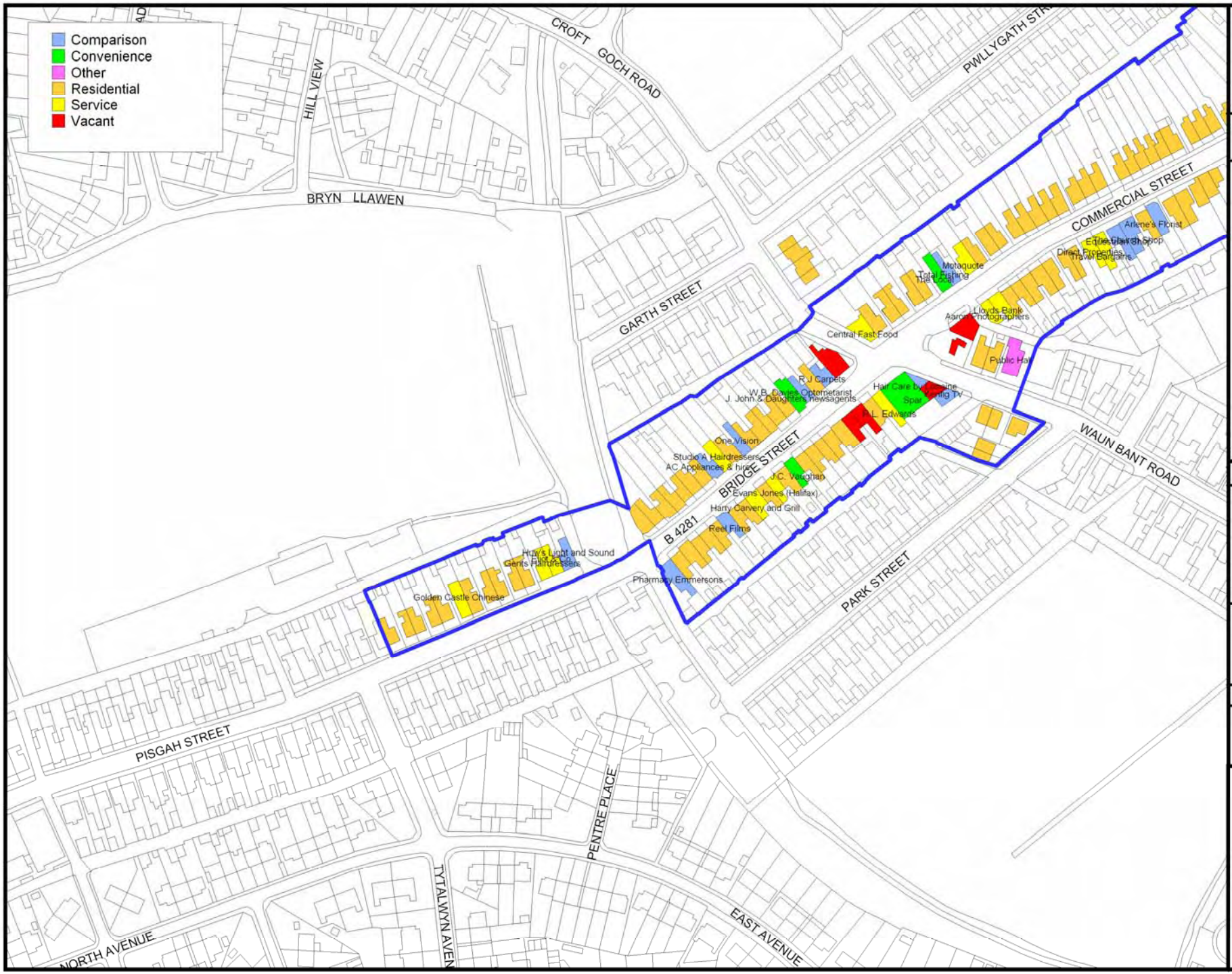
BRIDGEND County Borough Council



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Bridgend County
Retail Survey
October 2005

PYLE/KENFIG HILL (CENTRAL)

Scale = 1:1500

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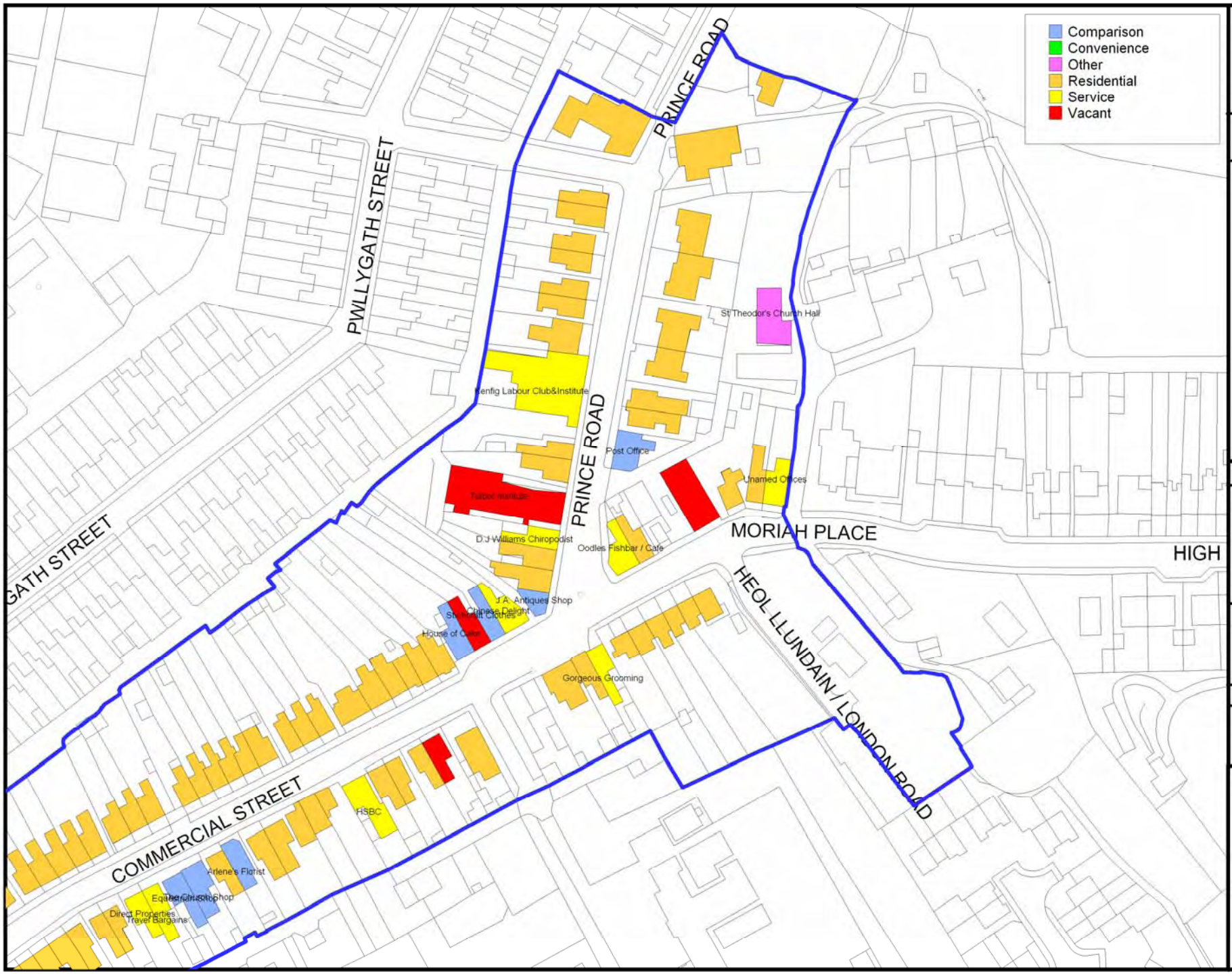
County Borough Council



Bridgend County
Retail Survey
October 2005

PYLE/KENFIG HILL (EAST)

Scale = 1:1500

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Cyngor Bwrdeistref Sirol
Penybont ar Ogwr
BRIDGEND
County Borough Council

BRIDGEND COUNTY BOROUGH - 2005

	No. of Units	Area (Sq. ft.)
All Established Commercial Centres		
Total Properties Surveyed:	1905	2,588,558
Total Service / Convenience / Comparison / Vacant	1138	1,873,059
Total Other (includes Residential Properties & Community Facilities etc.)	767	715,499
Total Vacant	170	232,294
% Vacant	8.92%	8.97%
Total Convenience	76	232,022
% Convenience	3.99%	8.96%
Total Comparison	375	606,238
% Comparison	19.69%	23.42%
Total Service	517	802,505
% Service	27.14%	31.00%
Convenience Goods		
Bakers & Confectioners	14	13,052
Butchers & Poulters	9	6,843
Grocery	33	193,372
Off licences / Confectioners / Tobacconists / Newsagents	20	18,755
Total	**76**	**232,022**
Comparison Goods		
Footwear and Repair	14	17,653
Mens and Boys Wear	9	11,282
Womens, Girls, Children and General Wear	63	104,558
Furniture, carpets & textiles	33	46,217
Booksellers, arts, crafts, stationers, copy bureaux	20	23,855
Electrical, gas, music & photographic	39	37,015
DIY, hardware & housewares	15	18,480
China, glass, fancy & leather goods	10	6,596
Cars, motorcycles & motor accessories	5	20,398
Chemists, drug stores & opticians	46	69,059
Variety, department & catalogue	23	132,540
Florists, nurserymen & seedsmen	12	8,856
Toys, hobby, cycle & sports	24	27,877
Jewellers & repair	14	10,597
Other	48	71,255
Total	**375**	**606,238**
Service		
Restaurants, coffee bars, fast food & takeaways	124	148,079
Pub / Club	62	184,414
Hairdressers, beauty parlours & health centres	68	45,746
Laundries and Dry Cleaners	5	4,658
Travel Agents	14	15,162
Banks, Building Societies and Financial Services	54	78,655
Estate Agents and Valuers	29	25,493
Professional Services	69	78,758
Other	92	221,540
Total	**517**	**802,505**
Distribution of Outlets by Size		
Under 1,000 sq ft.	1208	63.41%
Between 1,000 and 2,499 sq. ft.	502	26.35%
Between 2,500 and 4,999 sq. ft.	129	6.77%
Between 5,000 and 9,999 sq. ft.	45	2.36%
Between 10,000 and 14,999 sq. ft.	13	0.68%
Between 15,000 and 19,999 sq. ft.	5	0.26%
Between 20,000 and 29,999 sq ft.	2	0.10%
30,000 sq. ft. and above	1	0.05%
Total	**1905**	**100.00%**

Percentages are of Total Properties

RETAIL PARKS / SUPERMARKETS - 2005

Edge/Out of Centre (Figures include Mezzanine Floors)

	No. of Units	Area (sq. ft.)	
Total Properties Surveyed:	20	493,590	
Total Service / Convenience / Comparison / Vacant	20	493,590	
Total Other (includes Residential Properties & Community Facilities etc.)	0	0	
Total Vacant	1	6,997	Percentages are of Total Properties
% Vacant	5.00%	1.53%	
Total Convenience	4	239,637	
% Convenience	20.00%	48.90%	
Total Comparison	15	246,956	
% Comparison	75.00%	49.56%	
Total Service	0	0	
% Service	0.00%	0.00%	
Convenience Goods			
Bakers & Confectioners	0	0	
Butchers & Poulters	0	0	
Grocery	4	239,637	
Off licences / Confectioners / Tobacconists / Newsagents	0	0	
Total	**4**	**239,637**	
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	64,916	
Booksellers, arts, crafts, stationers, copy bureaux	0	0	
Electrical, gas, music & photographic	2	20,000	
DIY, hardware & housewares	4	128,262	
China, glass, fancy & leather goods	0	0	
Cars, motorcycles & motor accessories	1	13,778	
Chemists, drug stores & opticians	0	0	
Variety, department & catalogue	0	0	
Florists, nurserymen & seedsmen	0	0	
Toys, hobby, cycle & sports	1	10,000	
Jewellers & repair	0	0	
Other	0	0	
Total	**15**	**246,956**	
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.	4	20.00%	
Between 10,000 and 14,999 sq. ft.	9	45.00%	
Between 15,000 and 19,999 sq. ft.	1	5.00%	
Between 20,000 and 29,999 sq ft.	1	5.00%	
30,000 sq. ft. and above	5	25.00%	
Total	**20**	**100.00%**	

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	No. of Units	Area (Sq. ft.)
Total Properties Surveyed:	1925	3,082,148
Total Service / Convenience / Comparison / Vacant	1158	2,366,649
Total Other (includes Residential Properties & Community Facilities etc.)	767	715,499
Total Vacant	171	239,291
% Vacant	8.88%	7.76%
Total Convenience	80	471,659
% Convenience	19.69%	15.30%
Total Comparison	390	853,194
% Comparison	20.36%	27.68%
Total Service	517	802,505
% Service	26.86%	26.04%

Percentages are of Total Properties

Convenience Goods		
Bakers & Confectioners	14	13,052
Butchers & Poulters	9	6,843
Grocery	37	433,009
Off licences / Confectioners / Tobacconists / Newsagents	20	18,755
Total	**80**	**471,659**
Comparison Goods		
Footwear and Repair	15	27,653
Mens and Boys Wear	9	11,282
Womens, Girls, Children and General Wear	63	104,558
Furniture, carpets & textiles	39	111,133
Booksellers, arts, crafts, stationers, copy bureaux	20	23,855
Electrical, gas, music & photographic	41	57,015
DIY, hardware & housewares	19	146,742
China, glass, fancy & leather goods	10	6,596
Cars, motorcycles & motor accessories	6	34,176
Chemists, drug stores & opticians	46	69,059
Variety, department & catalogue	23	132,540
Florists, nurserymen & seedsmen	12	8,856
Toys, hobby, cycle & sports	25	37,877
Jewellers & repair	14	10,597
Other	48	71,255
Total	**390**	**853,194**
Service		
Restaurants, coffee bars, fast food & takeaways	124	148,079
Pub / Club	62	184,414
Hairdressers, beauty parlours & health centres	68	45,746
Laundries and Dry Cleaners	5	4,658
Travel Agents	14	15,162
Banks, Building Societies and Financial Services	54	78,655
Estate Agents and Valuers	29	25,493
Professional Services	69	78,758
Other	92	221,540
Total	**517**	**802,505**
Distribution of Outlets by Size		
Under 1,000 sq ft.	1208	62.75%
Between 1,000 and 2,499 sq. ft.	502	26.08%
Between 2,500 and 4,999 sq. ft.	129	6.70%
Between 5,000 and 9,999 sq. ft.	49	2.55%
Between 10,000 and 14,999 sq. ft.	22	1.14%
Between 15,000 and 19,999 sq. ft.	6	0.31%
Between 20,000 and 29,999 sq ft.	3	0.16%
30,000 sq. ft. and above	6	0.31%
Total	1925	100.00%

Figures do not include McArther Glen Designer Outlet

CONCLUSIONS

6.1.5 The results of the forth 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.

6.1.6 The retail parks and out-of-centre stores continue to perform very well, with a 95% occupancy rate. These account for approximately 16% of all commercial floorspace within the County Borough.

6.1.7 In total Bridgend County Borough has approximately 3.1 million square feet of floorspace within its ECCs, Retail Parks and Foodstores (excluding McArther Glen Designer Outlet Village), which incorporates nearly 2.3 million square feet of commercial floorspace. Floorspace vacancy rates lie at approximately 8% of total floorspace and 10% of commercial floorspace (which is comparable with the national average).

6.1.8 This forth 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 and boundaries in the Bridgend Local Development Plan, preparation of which commenced in December 2005.

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