RETAILING AND COMMERCIAL CENTRES IN BRIDGEND COUNTY BOROUGH

2002

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RETAILING IN BRIDGEND COUNTY BOROUGH 2002

1.1 INTRODUCTION

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

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

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

1.2 TOWN CENTRE HEALTH CHECKS

1.2.1 In recent years, the focus of retail development has been on Bridgend town and its environs. To this end previous monitoring of the impact of retail developments has been in the form of the annual Bridgend Town Centre Health Check, which is now in its fifth year.

1.2.2 The Council recognises the importance of Bridgend Town Centre to the retailing needs of the County Borough as a whole. This status should be maintained and to this end, the Bridgend Town Centre Health Check will continue to be updated to assess its status in the regional shopping centre hierarchy as well as the on-going Bridgend Town Centre Regeneration Strategy.

1.2.3 However, due to the emerging regeneration strategies of both Maesteg and Porthcawl it is felt necessary to begin an annual monitoring programme of these centres, and conduct an appropriate Health Check for each of these centres. It is therefore anticipated that the three Health Checks will be a vital component in assessing the effectiveness of the regeneration of these towns on the vitality, viability and attractiveness of the Town Centres.

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

1.3 ESTABLISHED COMMERCIAL CENTRE SURVEY

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

1.3.2 There are well over 1,800 individual properties within the ECCs of the County Borough, and by monitoring their occupancy both the vitality and viability of those Centres and the effectiveness of Development Plan policies can be assessed. By use of the Council's Geographical Information System (GIS) this data has been plotted onto an Ordinance Survey base, giving an effective visual tool of the performance of the ECA over time. This data (along with the Health Checks) will be particularly useful to Planning Consultants in the course of their submissions of major retail planning applications, and will also aid the Local Planning Authority in its decisions on smaller scale retail developments and regeneration initiatives.

1.3.3 It is envisaged that the use of this data will enable the Local Planning Authority to effectively review its Development Plan policies when they are examined again. The annual surveys 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. Alternatively, whilst surveying, additional buildings and/or land may be identified which could suit new development for suitable retail / leisure uses and therefore require the boundary to be amended to include new areas.

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

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TOWN CENTRE HEALTH CHECKS IN BRIDGEND COUNTY BOROUGH

2.1 INTRODUCTION

2.1.1 Bridgend Town Centre has been subjected to Town Centre Health Checks for the past four years, which have helped give an indication of the centre's overall performance in terms of national trends and of its economic, environmental and social performance over time. For the first time this year, Maesteg and Porthcawl Town Centres have also been reviewed. It is therefore useful to review the background of Health Check's and their application to Town Centres.

2.2 PLANNING POLICY BASIS OF TOWN CENTRE HEALTH CHECKS

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

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

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

2.2.3 *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.

2.2.4 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.

2.2.5 Town Centre Health Checks were initiated in Bridgend by the former Bridgend Town Centre Regeneration Sub-Committee in May 1998. Since that time there has been an annual survey of that town centre and the data from these checks will be incorporated into this year's survey. For Maesteg and Porthcawl, the 2002 Health Check will give base-line data, and through subsequent years this will be used to track the progress of these smaller town centres.

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

Information for Measuring Vitality, Viability and Attractiveness

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

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

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

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

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

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

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

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

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

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

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

(TAN (W) 4: Paragraph 5 refers)

Figure 1

BRIDGEND TOWN CENTRE HEALTH CHECK 2002

3.1 INTRODUCTION

3.1.1 The 2001 Bridgend Town Centre Health Check concluded that whilst prime rental values had fallen in the large centres of Cardiff, Swansea and Newport, these rates had remained constant in Bridgend. The town centre also saw an increase in the rental values for prime office space. In addition there was a significant (6%) increase in the number of multiple retailers in the centre, taking it above the national average.

3.1.2 Whilst vacancy rates had increased slightly on the previous year, the total floorspace occupied in the town centre rose by 7,000 sq feet and sample footfalls in the Rhiw Shopping Centre had increased by 7%. Bridgend continued to be an attractive centre for shoppers, with its physical environment, public realm and safety being enhanced by, for example, the establishment of permanently pedestrianised zones within the town centre and associated streetscape improvements.

3.2 RETAIL AND OFFICE FLOORSPACE RENTS AND COMMERCIAL YIELD

3.2.1 Primary retail floorspace rents remained static in Bridgend Town Centre in 2002, at £60 per sq. ft. The comparable data for other centres, shown in Figure 2 below, shows that, whilst the larger centres of Cardiff, Swansea and Newport have shown an increase in their primary rents, smaller centres such as Bridgend, Neath and Pontypridd have seen no growth in their rental values.

3.2.2 These trends once again show a continuing movement of retailer confidence away from sub regional centres to the major regional centres, this is especially so after the drop in rates in the larger centres during 2001. Investment has therefore, once again, been concentrated back into the major centres and this trend may continue until those pre-2001 rates in the larger centres have been achieved.

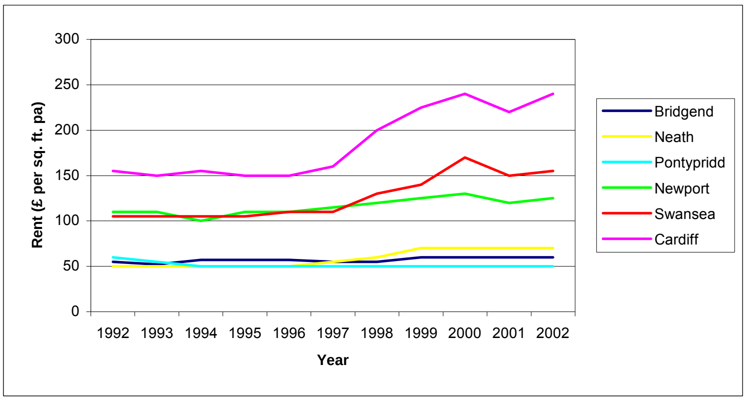

Figure 2 Prime Retail Rents
Source: Colliers CRE

3.2.3 Rents in the out-of-town retail parks of the County Borough have also remained constant at £13 per sq. ft., this has been the case since 2000.

3.2.4 Figure 3 depicts the average retail rents for Secondary locations within the Town Centre. Bridgend saw a slight rise in these rates over the previous year. The sharp rise in the larger centres in the late 1990's can be attributed to two things; firstly, that the larger sites in secondary areas were being taken by expanding retailers; and secondly, the growing competition for smaller units (usually located in secondary areas) for the booming coffee shop and mobile phone sector. There is evidence from the town centre survey that this phase is beginning to reach Bridgend, as these types of multiples look for new centres to locate to.

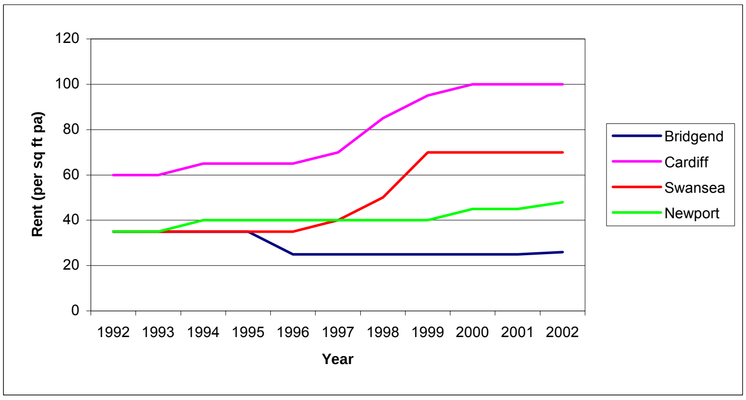

Figure 3 Secondary Retail Rents
Source: Cooke & Arkwright Property Review 2002 / Bridgend CBC

3.2.5 Yield indicates investor confidence in a town centre. It is the ratio of rental income to capital value and is expressed in terms of the market rents of a property as a percentage of the capital value. The lower the yield, the higher the capital value resulting from a given rental income therefore greater investor confidence. The level of yield broadly represents the market's evaluation of the risk attached to the income from shop rents. It is normally the case that towns with large shopping areas tend to have lower yields than smaller towns.

3.2.6 Figure 4 shows Primary Retail Yields for the past five years. As expected, being the smallest of the centres profiled, Bridgend has a high retail yield when compared to Cardiff, Newport and Swansea. As can be seen from the graph, yields increased in all areas between 1998 and 2001, and remained constant (except in Cardiff) between 2001 and 2002. Despite Bridgend showing a higher rise than the other centres; this can be put down to its size and the fact that drops in investor confidence will always effect smaller centres to a greater extent.

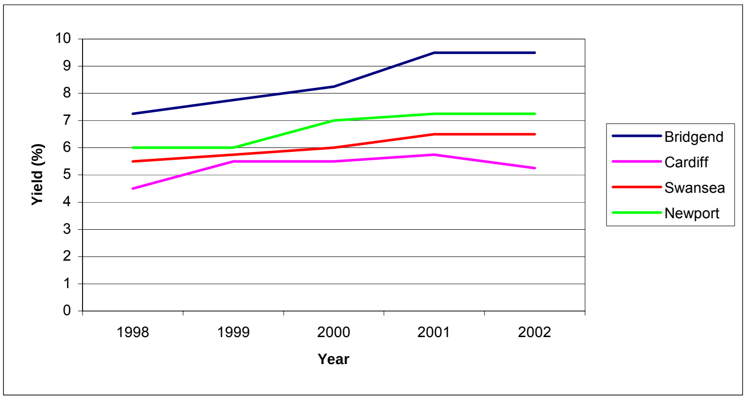

Figure 4 Primary Retail Yields

Source: Cooke & Arkwright Property Review 2002 / Valuation Office

3.2.7 Prime commercial office rents continue to perform well in Bridgend. Whilst Cardiff continues to dominate the office market in the region, attracting higher rates, other centres, including Bridgend, are beginning to attract increasingly higher rents (Figure 5 refers), indicating a growing confidence in this sector away from the Capital. In addition, new office developments in Bridgend are attracting rental values of £12 per sq. ft., only £1 less than those rents achieved in Swansea and Newport. The available supply of office space in Bridgend has also increased recently, due to the completion of new office accommodation at Derwen Road and the commencement of construction on a call-centre building on the former Courage Depot Site, Tondu Road.

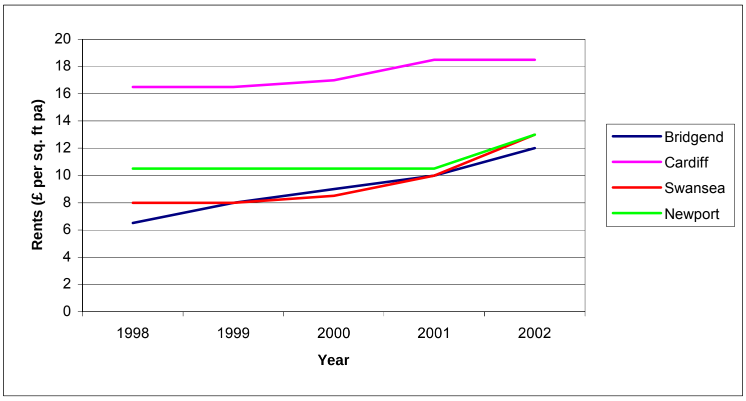

Figure 5 Prime Commercial Office Rents

Source: Cooke & Arkwright Property Review 2002 / Bridgend CBC

3.3 RETAILER REPRESENTATION & CHANGE AND DIVERSITY OF USES

3.3.1 The results of the first Bridgend Town Centre Retail Survey, undertaken by the County Borough Council can be seen in Tables 1 and 2 below. As can be seen from the total number of properties surveyed, the 2002 survey took in far more properties than previous, commercially provided data was based upon. The reason for this is that the survey encompassed *all* buildings (at ground floor level) within the adopted Established Commercial Area of Bridgend, as defined in the adopted Ogwr Borough Local Plan (1995). Previous data was not based upon this definition of the town centre.

Convenience Goods	**1998***	**1999***	**2000***	**2001***	**2002#**
Bakers & Confectioners	5	7	7	6	5
Butchers & Poulters	1	1	1	1	1
Grocery	7	6	6	6	5
Off licences / Confectioners / Tobacconists / Newsagents	2	2	2	2	2
Total	**15**	**16**	**16**	**15**	**13**
Comparison Goods					
Footwear and Repair	10	9	9	9	6
Mens and Boys Wear	6	6	5	3	4
Womens, Girls, Children and General Wear	33	30	29	29	26
Furniture, carpets & textiles	11	13	13	14	13
Booksellers, arts, crafts, stationers, copy bureaux	12	13	12	14	9
Electrical, gas, music & photographic	14	16	15	18	20
DIY, hardware & housewares	4	7	7	5	6
China, glass, fancy & leather goods	9	9	10	8	6
Cars, motorcycles & motor accessories	2	2	2	2	1
Chemists, drug stores & opticians	10	10	10	11	13
Variety, department & catalogue	7	3	3	5	7
Florists, nurserymen & seedsmen	3	3	3	2	3
Toys, hobby, cycle & sports	10	13	11	11	9
Jewellers & repair	8	8	8	7	9
Other	8	7	7	8	13
Total	**147**	**149**	**144**	**146**	**145**
Service					
Restaurants, coffee bars, fast food & takeaways	33	34	33	36	36
Pub / Club					18
Hairdressers, beauty parlours & health centres	25	25	25	24	20
Laundries and Dry Cleaners	1	1	1	1	1
Travel Agents	8	8	8	7	7
Banks, Building Societies and Financial Services	20	22	21	22	25
Estate Agents and Valuers	12	12	12	9	13
Professional Services					13
Other	4	4	5	5	23
Total	**103**	**106**	**105**	**104**	**156**
TOTAL COMPARISON / CONVENIENCE / SERVICE	**265**	**271**	**265**	**265**	**314**
VACANT UNITS	**37**	**26**	**33**	**35**	**57**
VACANT UNITS (% OF TOTAL)	**12.25**	**8.75**	**11.07**	**11.63**	**12.20**
RESIDENTIAL PROPERTIES					**60**
TOTAL OTHER PROPERTIES	**4**	**4**	**5**	**5**	**36**
TOTAL	**265**	**271**	**265**	**261**	**467**
Sources: * = GOAD # = Bridgend CBC					

Table 1 Retail Provision in Bridgend Town Centre

3.3.2 In total over 467 properties were surveyed, encompassing 888,593 sq ft of floorspace. Of this, 314 (654,919 sq. ft.) properties were used for commercial uses, and 57 (91,472 sq ft.) were vacant. The Council survey also introduced 'Pub/Club' and 'Professional Services' categories for the first time. Further statistics can be found in chapter 6 of this report.

3.3.3 Whilst caution should be noted with regard to the comparison of this year's data with previous years data due to the different sources and more importantly, the increased survey area; a number of trends can be identified:

- The general decline in convenience and comparison goods in favour of the service sector[1]
- The decline in the number of outlets selling footwear
- The increase in the number of electrical outlets[2]
- A vacancy rate comparable with the national average[3]

Distribution of Outlets by Size	**Number**	**%**
Under 1,000 sq ft.	220	47.11
Between 1,000 and 2,499 sq. ft.	162	34.69
Between 2,500 and 4,999 sq. ft.	49	10.49
Between 5,000 and 9,999 sq. ft.	23	4.93
Between 10,000 and 14,999 sq. ft.	9	1.93
Between 15,000 and 19,999 sq. ft.	3	0.64
Between 20,000 and 29,999 sq ft.	1	0.21
30,000 sq. ft. and above	0	0
Total	**467**	**100.00**

Table 2 Outlet Size Distribution

Source: Bridgend CBC

3.3.4 Table 2 highlights the fact that the majority of outlets in the town centre are below 2,499 sq. ft. in size. Whilst this does well to encourage small, locally generated business enterprise, it does not provide flexibility for major retailers who require large stores to look to Bridgend as a town centre for investment. This situation could change with any redevelopment / extension of the Rhiw Shopping Centre and any of the other Key-retail redevelopment sites as highlighted in the Development Plan and Town Centre Strategy. Of course this factor does not preclude the possibility of several outlets combining to form one larger unit, however, this may involve several acquisitions that a large retailer / property owner will not be willing to partake in.

[1] Notwithstanding the fact that the wider survey area included areas where traditionally more service sector based outlets would be located.
[2] This can be attributed to the increase in the popularity of electrical technology, most prevalent: mobile phones.
[3] National Average = approx. 11%. Again, the wider survey area included areas where traditionally there are higher vacancy rates.

3.3.5 Retailer representation continues to be reasonable, with a range of national multiple retailers including Boots, Woolworths, WH Smith, Dixons, Burton, Argos and Dorothy Perkins. This has been supplemented in recent years by smaller national retailers selling mobile phones. In addition, 2002 saw the establishment of new national retailers such as Claire's Accessories and Farm Foods. However, the town centre still lacks a major department store such as Marks & Spencer or Debenhams to act as a key attractor for shoppers and to anchor the town centre in the regional shopping hierarchy.

3.4 PEDESTRIAN FLOW

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

3.4.2 Weekly footfall figures for the Rhiw Shopping Centre show, on average, a 2.5% increase in the numbers of people visiting this prime shopping area between 2001 and 2002[4]. Whilst the previous year the increase had been approximately 6.9%, this can be attributed to an increase in the centre's vitality after the uncertainty caused by the pedestrianisation works. Nevertheless, these footfall figures showed marked improvements since 2000, especially during the busy Christmas period (see figure 6 below).

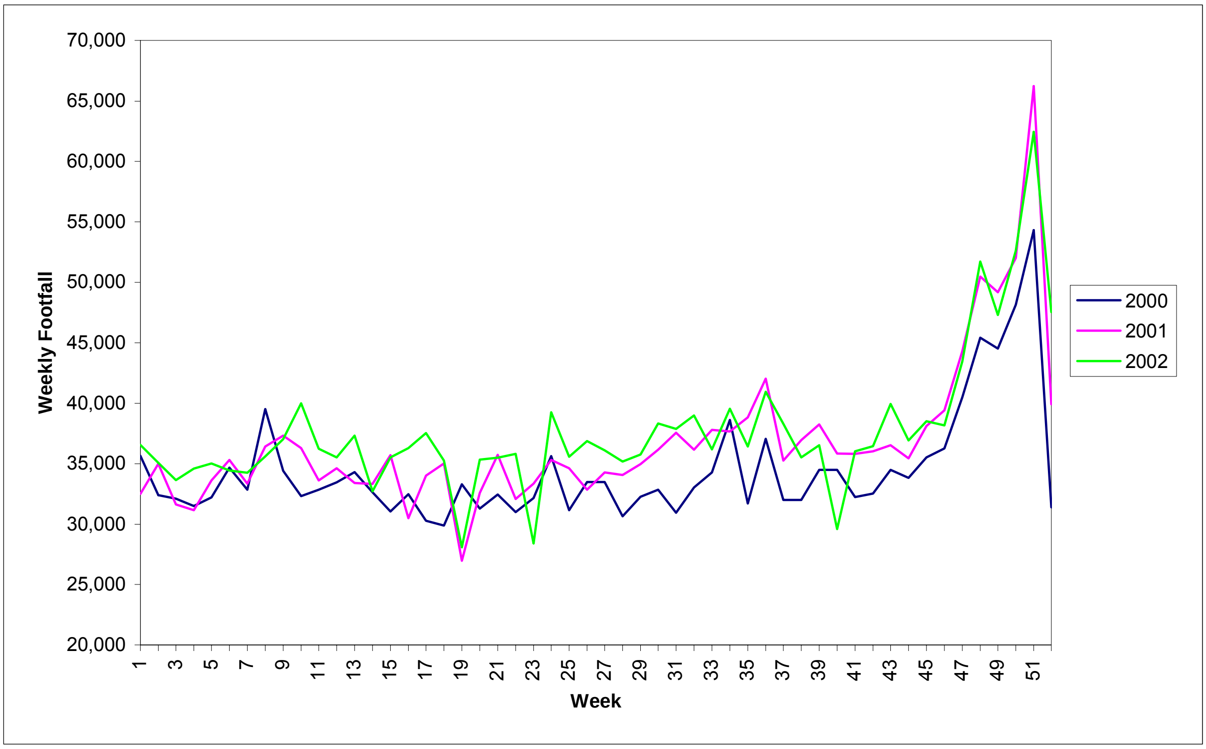

Figure 6 Weekly Footfall Figures - Rhiw Shopping Centre

Source: Rhiw Shopping Centre Management

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

3.4.3 Visual observations indicate however, that areas such as southern Nolton Street and north eastern Market Street are still experiencing low footfalls throughout most of the day.

3.5 ACCESSIBILITY

3.5.1 Accessibility for the less active within Bridgend Town Centre has greatly increased and been improved since the completion of the first phases of pedestrianisation and the introduction of a wider shopmobility scheme. This is likely to increase further with the implementation of Phase Four of these works in Dunraven Place.

3.5.2 The Disability Disrcimination Act 1995 requires that, from 2004, service providers, including retailers, have to overcome physical features which make it impossible or unreasonably difficult for a disabled person to use a service by removing or altering these features. This may mean that in the forthcoming year, up to this deadline, there may be some necessary disruption to shoppers and office users as retailers / owners of buildings, carry out works required to meet the requirements of the Act.

PUBLIC TRANSPORT

3.5.3 The main operator for local bus services into, and out of, Bridgend is First Group. Through a number of routes, they provide services to and from Porthcawl, Bettws and the Llynfi, Garw and Ogmore Valleys at intervals of at least 20 minutes. These services are also supplemented by other smaller firms. Within Bridgend, First Group operate a number of suburban services, which serve the areas of: Bryntiron, Cefn Glas and Ystrad Fawr (every 20 minutes); Wildmill and Litchard (every 30 minutes); and Brackla and Pencoed (every 60 minutes).

3.5.4 Outside the County Borough, there are regular services to and from Cardiff (via Cowbridge every 20 minutes), Swansea (via Port Talbot - every 60 minutes) and Pontypridd (every 60 minutes), with less frequent services to and from Aberdare, Llantwit Major and Aberystwyth. The Traws Cambria daily service from Porth to Llandudno also stops at Bridgend Bus Station.

3.5.5 The above indicate that Bridgend Town Centre is widely accessible by bus transport. In future years, an indication of the town centre's vitality and viability will be any cancellations of, or reductions in, these services. It is envisaged that redevelopment of the main bus station on Quarella Road in the town will also improve bus passenger services, both in terms of quality and quantity. Whilst the redevelopment may cause short term disruption to traffic / bus flows within the town centre, the benefits which would become evident from this scheme should be realised in the medium term.

3.5.6 Bridgend's principal railway station lies within the confines of the town centre. Located on the High Speed line between Swansea, Cardiff and

London, it offers hourly services to and from these cities, stopping at principal intermediate Stations. In addition, regular services between Cardiff and West Wales also stop at Bridgend.

3.5.7 Within the Borough, Pyle has a direct service to Bridgend every two hours throughout the day and Pencoed, every hour. The Maesteg railway line, with intermediate stations at Wildmill, Sarn, Tondu and Garth operates an hourly service to Bridgend, which travel on to Cardiff, supplementing the train services to the capital as outlined above.

3.5.8 The above also illustrates how well Bridgend Town Centre is accessible by train. Deposit UDP Policy T19(3) provides for improvement of the Maesteg railway line to facilitate a half hourly service during the plan period. This, coupled with the future re-opening of the Vale of Glamorgan line, with stations at Rhoose (for Cardiff Airport) and Llantwit Major will increase potential passenger movement into the town centre by train.

CAR PARKING

3.5.9 Table 3 below lists the Car Parks in Bridgend Town Centre, with their corresponding capacity of spaces.

CAR PARK	**NUMBER OF SPACES**
Brewery Lane	155
Tesco	269
Tremains Road	54
Bridgend Railway Station	91
Brackla Surface	126
Kwik Save	71
Rhiw Centre	423
Brackla Long Stay	376
Brackla Short Stay	353
Bowls Hall	103
Recreation Centre	110
Swimming Pool	40
TOTAL	**2171**

Table 3 Car Parking Provision in Bridgend Town Centre

Source: Bridgend CBC

3.5.10 The most popular car parks for patrons of the town centre are those which are closest to the centre, i.e. the Rhiw Centre and Brackla Surface Car Parks. However, both of these have been designated as key retail redevelopment sites in the deposit UDP. In addition, the Brackla Short Stay Car Park is allocated for development under policy REG3(4) of the deposit UDP. Whilst some concern has been raised over the loss of existing provision, it should be noted that, with the exception of the Brackla Surface Car Park, only rarely are they used to their full capacity. In addition the YMCA site and an extension of the Tremains Road Car Park are also allocated for additional future car parking provision, which should off-set the potential loss of spaces caused by redevelopment.

3.5.11 Hence it can be anticipated that people will choose to park further from the centre, increasing footfall in the peripheral areas as shoppers / users of the town centre use these areas to access the core of the commercial area. This will add vitality to those areas, as more people pass through them and which should be beneficial in terms of the viability of more peripheral retail units.

3.6 CUSTOMER VIEWS

3.6.1 The resources are not currently available to undertake or commission an annual customer survey in order to gauge their opinion of the town centre. However in late 2002, Colliers CRE, an independent consultancy firm, undertook a retail needs assessment of the County Borough, in order to inform the deposit Unitary Development Plan. As part of their research they undertook a household survey, asking members of the public within the Borough about their shopping habits.

3.6.2 Some key findings of their survey were as follows (all figures - except where stated otherwise - relate to non-bulky comparison goods shopping):

- From the survey area, Bridgend Town Centre holds 30.4% of the market share of main centre destinations and 18.8% of secondary centre destinations.
- 76% who use Bridgend Town Centre as their main destination, do so because it is close to home / convenient. 15%, because it has a good choice of shops / goods.
- 26% of all surveyed said they did not shop in Bridgend Town Centre because there was a better choice elsewhere.
- 45% of shoppers arrive as a car driver; 20% by bus; 3% by train; and 19% walk.
- 18% of all surveyed said they used Bridgend Town Centre for their Christmas and other special occasion shopping; 34% shop in Cardiff.
- For convenience goods shopping, the average weekly household expenditure for those conducting their main shopping trip in Bridgend Town Centre was £51.

3.6.3 The above findings indicate that Bridgend Town Centre appears to lack the attractiveness of other centres, and is used more because it is convenient, rather than for the range of stores etc. it has to offer. These results could be supplemented by surveying actual users of the town centre as to their opinion of the facilities/stores available

3.7 PERCEPTION OF SAFETY / OCCURRENCE OF CRIME

3.7.1 Separate statistics on crime are not available from the South Wales Police / Home Office with regard to Town Centres. The County Borough currently has 94 CCTV cameras, the majority of which are located in Bridgend Town Centre. Town Centre Disorder is also a priority of the County Borough's Crime and Disorder Strategy, which also looks to the Town Centre Strategy to: "*allay fears through a range of multi-agency approaches involving the police, licensing and environmental health".*

3.7.2 Aspects of the Town Centre Operational Regeneration Group's work will also be valuable in the future. The 'Living in the Town' sub-group is investigating the potential for promoting 'in-town' living in Bridgend and this may lead to the prospect of the town centre becoming more of a '24 hour town', increasing perceptions of safety, particular in the evenings, when fear of crime generally rises due to anti-social behaviour.

3.8 ENVIRONMENTAL QUALITY

3.8.1 The environmental quality of the town centre continues to improve with the ongoing pedestrianisation works. As mentioned previously, in 2003 this should involve the implementation of Phase Four of that scheme, in the vicinity of the War Memorial in Dunraven Place. A number of commercial properties have been improved through the implementation of works assisted under the BCBC/WDA sponsored Town improvement Grant scheme since its inception in 2000. The scheme is still in operation and other individual projects are being pursued. Following promising initial contacts with property owners, the Town Centre Regeneration Officer in consultation with the Planning Department and the WDA is also commissioning a feasibility study concerning the undertaking of grouped improvements of properties in Dunraven Place. A number of these properties are listed and in addition to enhancing the public realm works at the location, the project would facilitate the replacement of key architectural features that have been lost from the buildings.

3.8.2 The Regeneration Operational Group has also been looking at ways to improve the environmental quality of the town centre. These include the removal of discarded chewing gum from pavements, the enhancement of footpaths and cyclepaths with money granted from the Welsh Assembly Government, the refurbishment of the bus station, and the carrying out of a Community Street Audit. The results of all of these initiatives will be reported in subsequent Town Centre Health Checks.

3.9 National Vitality Score

3.9.1 Finally, Experian Goad produce an annual *Retail Centre Ranking* report which gives 250 centres across the UK a 'vitality index', expressed against London's West End, which has vitality of 1,000. As to be expected, in this region Cardiff, Swansea and Newport all perform well, with rankings of 6, 55 and 104 respectively. Bridgend town centre's ranking is 224 (a rise of 35 places on the previous year) which now places it above Neath, Llanelli, Merthyr Tydfill and Pontypridd.

3.10 Conclusions

3.10.1 From the indicators listed above the town centre's performance over the past twelve months can be summarised as follows:

- Primary retail rents remained constant at £60 per sq. ft., with a slight rise in secondary rents.
- Office rents continue to rise, going against the experiences of Cardiff, which has seen no growth in rents for the past two years.
- The supply of large sized outlets however remains limited.
- Retailer representation has extended to include more national retailers.
- Pedestrian Flow increased by 2.5% over the year in the Rhiw Centre
- The town centre continues to be very accessible by a choice of means of transport including, car, bus and train.
- Vitality levels above Neath, Llanelli, Merthyr Tydfill and Pontypridd.

3.10.2 The appointment of a dedicated Bridgend Town Centre Regeneration Officer in 2002 by the County Borough Council and the work of the Town Centre Regeneration Operational Group will also aid in improving the attractiveness of the town centre both to those who use the centre, and those with an interest in using / locating to the centre. This, coupled with the continuing improvements to the public realm by the pedestrianisation works, will also greatly improve the environment of the centre for patrons. Other seasonal attractions such as the Summer and Winter Festivals (including the 'Winterland') have greatly improved the image of the town centre as a whole. It will be a further priority of the role of the Operational Group to capitalise upon this, and to more effectively communicate such initiatives and successes in the future.

3.10.3 The indicators studied above conclude that Bridgend Town Centre has remained relatively stable over the last 12 months, with vitality levels comparable with (and mostly above) many other towns of its size within the region. In the medium-term, despite the opening and expansion of the McArthur Glen Factory Outlet Shopping Centre since May 1998, it appears that Bridgend Town Centre has continued to experience growth and relative prosperity, despite competition from comparable and larger centres within the region. However, with over 35,000 sq. ft.

of unimplemented consent for further retail units at the Factory Outlet Centre, Bridgend Town Centre must not stand still with its regeneration efforts in order for it to compete effectively in the future.

PORTHCAWL TOWN CENTRE HEALTH CHECK 2002

4.1 INTRODUCTION

4.1.1 The Porthcawl Town Centre Health Check assess the overall performance of Porthcawl town centre against the relevant indicators set out in TAN 4 (Wales). The comparative basis for this study area is in some way limited however due to it being the first health check to be carried out on the town. The 2002 Town Centre Health Check for Porthcawl will therefore act as a base-line study facilitating comparisons in subsequent years.

4.1.2 The seaside resort of Porthcawl contains a significant retirement and commuter residential base. It is one of the primary resorts on the southeast coast of Wales and has a population of around 16, 100. For some considerable time, Porthcawl has experienced the structural problems found in most British seaside resorts. Improvements in air travel and cheap package holidays have resulted in the shift to foreign holidaymaking. It can be said that Porthcawl has born the brunt of such a phenomenon and has become what some would argue is a ‘dated product’. The emerging Porthcawl Regeneration Strategy is an attempt to redress such decline by proposing to deliver a modern regeneration ‘package’. It is therefore necessary to begin monitoring the performance of the Town Centre in conjunction with the development of the Regeneration Strategy, so that an assessment can be made of how the regeneration of the area is progressing.

4.2 RETAIL AND OFFICE FLOORSPACE RENTS

4.2.1 The most recent up-to-date figures for 2002 suggest that prime retail rents in Porthcawl Town Centre stood at £27 per sq. ft. A Retail Study carried out by CEL Consultants stated that in March 1998 retail rents stood at £23 per sq. ft. There has therefore been an increase of 17.39% in prime retail rents over a four-year period i.e. an increase of £1 per annum. This is a rather small increase, however, it should be noted that such a small increase is quite positive when it is compared to the larger centres such as Bridgend, Neath and Pontypridd, which have seen no growth in their rental values since about 1999. Despite there being increases in retail rents, the current level of £27 per sq. ft. is still quite low, which exemplifies the weak nature of Porthcawl’s retail core. It is also interesting to compare Porthcawl’s retail centre to other centres of similar size within the County Borough such as Maesteg. Prime retail rents in Maesteg are within the low £20’s and therefore lower than rents in Porthcawl. Such a comparison suggests that locally there is stronger retailer confidence in Porthcawl, which to some extent may be explained higher levels of wealth and affluence in the local catchment area, and greater accessibility to the M4 corridor.

4.2.2 A similar trend can be seen when Office Rents in Porthcawl and Maesteg are compared. In Porthcawl, Prime Office Rents stand at £10 per sq. ft. (prime) and £7 per sq. ft. (secondary). Office rents in Maesteg are lower and stand at £8 (prime) and £5 (secondary). However, office rents in Bridgend are higher than those in Porthcawl (see health check for Bridgend). This is the expected trend with Bridgend being a stronger, sub-regional Town Centre.

4.2.3 Office rent figures in Porthcawl will be kept under review and updated in subsequent town centre health checks, aiding future comparative analysis.

4.3 RETAILER REPRESENTATION, CHANGE AND DIVERSITY OF USES.

4.3.1 It was mentioned earlier in this report that in 2002, survey work had been carried out on all thirteen Established Commercial Areas (ECAs) within the County Borough. The results of the first Porthcawl survey (undertaken by the County Borough Council) and the data contained in the 1998 CEL Property Consultants' Report: *volume 3 (retail study),* will be used for making comparisons on retail change, representation and diversity of uses. There are however, problems of validity when making comparisons from these two data sets. The main problem lies with the fact that there are differences in the definition of the town centre in both surveys. The 2002 Retail survey encompassed all buildings within the adopted ECA boundary as defined in the adopted Ogwr Borough Local Plan (1995). The 1998 Retail Study incorporates a different definition and its main focus was on John Street and the adjoining retail areas i.e. the peripheral edge of South Road to the North, New Road to the East, the Esplanade to the south and Lias Road to the west.

4.3.2 Despite there being two different definitions of the Town Centre, this should not offset conclusions made from comparing the two data sets to any great extent. The main difference between the two is that the adopted ECA boundary includes Mary Street (to the west of John Street) and Hillsboro Place (to the east). Mary Street and Hillsboro Place contain very few units undertaking retail activity and are predominantly residential and/or made up of guesthouses. Therefore, it is still useful to use the two studies as a comparative basis, investigating changes in the retail make-up of the town. The results of both surveys are shown in Table 1 overpage.

4.3.3 Table 3 indicates that the Town Centre is dominated by comparison goods outlets both in 1998 and 2002. In 2002, over 27% of all units were comparison outlets, where as only 4.5% of all units were convenience outlets. If we compare data sets from both studies then it is apparent that there has been a slight decrease in both convenience and comparison outlets over the past 4 years. However, over the same period there has

PORTHCAWL	1998*	2002#
Convenience Goods		
Bakers & Confectioners	-	3
Butchers & Poulters	-	2
Grocery	-	5
Off licences / Confectioners / Tobacconists / Newsagents	-	2
Total	**15**	**12**
Comparison Goods		
Footwear and Repair	-	4
Men's and Boys Wear	-	0
Women's, Girls, Children and General Wear	-	16
Furniture, carpets & textiles	-	7
Booksellers, arts, crafts, stationers, copy bureaux	-	8
Electrical, gas, music & photographic	-	6
DIY, hardware & housewares	-	3
China, glass, fancy & leather goods	-	1
Cars, motorcycles & motor accessories	-	1
Chemists, drug stores & opticians	-	7
Variety, department & catalogue	-	4
Florists, nurserymen & seedsmen	-	0
Toys, hobby, cycle & sports	-	3
Jewellers & repair	-	4
Other	-	9
Total	**75**	**73**
Service		
Restaurants, coffee bars, fast food & takeaways	-	21
Pub / Club	-	4
Hairdressers, beauty parlours & health centres	-	10
Laundries and Dry Cleaners	-	2
Travel Agents	-	5
Banks, Building Societies and Financial Services	-	7
Estate Agents and Valuers	-	6
Professional Services	-	8
Other	-	4
Total	**59**	**67**
TOTAL	**149**	**152**
VACANT UNITS	**7**	**12**
VACANT UNITS (% OF TOTAL)	**4.48%**	**4.50%**
TOTAL OTHER PROPERTIES	-	103
Sources: * = CEL Retail Study / # = Bridgend CBC		

Table 3

been an increase in the number of service sector outlets from 59 in 1998 to 67 in 2002. In 2002, over 25% of all outlets were service sector outlets – just 2% lower than all units, which are comparison outlets. Whilst some caution should be taken when comparing the above data sets (for reasons mentioned above), it is still possible to identify the trend of a general decline in convenience and comparison goods in favour of the service sector, a trend evident in most towns and cities. However, in Porthcawl the increase in the number of service outlets has been greater than the decline in outlets selling convenience and comparison goods. An explanation for the high percentage of service outlets and in particular A3 outlets in Porthcawl (which accounts for greatest proportion of all service outlets – 31%) is that it reflects the tourist nature of the town.

4.3.4 There are only 2 main foodstores in Porthcawl – a Somerfield on Lias Road and a small Spar on John Street. Neither provide the retail offer for a typical bulk shopping trip

4.3.5 From 1998 to 2002 the number of vacant outlets in Porthcawl increased from 7 to 12 outlets. Vacancy levels are an important indicator of vitality and viability, but as mentioned earlier should be used with care, as vacancies can arise in the strongest towns. Despite this increase in vacancy levels, it should be pointed out that vacant properties account for only 4.5% of all properties surveyed in 2002 and is well below the national average of 12%. The low vacancy level suggests that Porthcawl is able to attract and retain independent retailers.

4.3.6 Table 4 illustrates that just over half of all properties surveyed in 2002 are below 1,000 sq. ft in size. This suggests that Porthcawl does well in encouraging small independent retailers serving local needs, however it does not

Distribution of Outlets by Size		
Under 1,000 sq ft.	136	50.94%
Between 1,000 and 2,499 sq. ft.	101	37.83%
Between 2,500 and 4,999 sq. ft.	20	7.49%
Between 5,000 and 9,999 sq. ft.	8	3.00%
Between 10,000 and 14,999 sq. ft.	1	0.37%
Between 15,000 and 19,999 sq. ft.	0	0.00%
Between 20,000 and 29,999 sq ft.	0	0.37%
30,000 sq. ft. and above	0	0.00%
Total	**266**	**100%**

Table 4

4.3.7 provide the flexibility for major retailers who require large stores. The size and shape of units on John Street impose restrictions when catering for the larger store formats. This situation could change with any re-development / extension of the town centre. Of course this factor does not preclude the possibility of several outlets combining to form one larger unit. This has been the case with the recent 'Seconds Ahead' outlet located on John Street. However, this involves several acquisitions that a large retailer / property owner may not be willing to partake in.

4.3.8 Multiple retailing is adequately represented on John Street. Major Retailers present in Porthcawl Town Centre include:

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

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

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

4.4 PEDESTRIAN FLOW

4.4.1 It is difficult to assess changes in pedestrian flows over a period of time for Porthcawl town centre because there is no published pedestrian flow information available to enable comparisons to be made. The consultants who produced the 1998 Retail Study undertook no detailed pedestrian count surveys. However, from observation, there appears to be a moderate to high flow along the pedestrian section of the prime pitch along John Street. John Street facilitates the linear movement pattern of shoppers which occur between the anchor stores' of Somerfield and Woolworth at each end of the primary centre. Low flows are most apparent on the periphery of the centre i.e. in the secondary shopping area of New Road. New Road is separated from the core centre by the A 4106 dual carriageway, which impedes movement into the area. A pedestrian subway links the north end of John Street with the secondary shopping area of New Road. However, the fact that it runs under the road means it is not very 'user friendly', which could explain the low foot flows which are apparent in New

Road. Better signage from the pedestrianised part of John Street could help in encouraging visitors to explore the New Road shopping area. This is an area where further survey work is needed to enable proper monitoring.

4.5 ACCESSIBILITY

4.5.1 Porthcawl town centre is highly accessible by car, bicycle and public transport. The town is located within easy reach of the M4 and has a good link road to junction 37. Accessibility for pedestrians within the town has been increased in recent years by the former Mid Glamorgan County Council Pedestrianisation Orders. In 1994, this enabled the pedestrianisation of John Street from the southern side of its junction with Lias Road, southwards to the northern side of its junction with Well Street, and for Old School Road from the eastern side of its junction with the road leading from Mary Street car park eastwards to its junction with John Street. Both schemes have greatly reduced the pedestrian/vehicular conflict within the town centre.

Public Transport:

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

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

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

4.5.5 In future, links to Porthcawl are set to be strengthened through Policy T20 of the Deposit UDP. Policy T20 proposes a Park and Ride facility within the vacinity of Nottage roundabout, serving the town. Such a measure will aid the diversion of car-borne journeys to Porthcawl onto buses. This will help to improve the shopping environment by reducing congestion within the town centre.

Car Parking:

4.5.6 Table 5 below lists the off-street car parks within Porthcawl.

Car Park	**No. of Spaces**
John Street	80
Hillsboro Place	330
Somerfield	170
Salt Lake	2000
Sandy Lane	350
Mackworth Road	320
TOTAL	3250

Table 5

4.5.7 Currently, there are 3,250 off-street car park spaces in Porthcawl town centre and an additional 1,300 spaces at the Rest Bay seasonal car park. Of the off-street car parks, John Street, Hillsboro Place and the Somerfield (roof top) car park serve the shopping centre. The remaining car parks, Salt Lake, Mackworth Road and Sandy Lane are long – stay car parks, which serve the main summer visitors to the town. Hillsboro Place and John Street car parks operate a ‘pay and display’ system. With respect to on-street parking, there is unrestricted parking adjacent to the town centre in Hillsboro Place, James Street, Mary Street, Dock Street, Well Street, the Square and John Street which accounts for a total of approximately 140 spaces. The Esplanade and Eastern Promenade provide around 270 spaces, adjacent to the seafront. These on-street spaces are occupied all year-round.

4.5.8 As already stated, Porthcawl is experiencing a decline. This coupled with the fact that the majority of shopping trips in the centre are for a limited number of purchases, means that easy and accessible parking is fundamental to the future success of the town centre. At present, there is an adequate supply of parking for both shoppers and visitors.

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

4.6 Customer Views and Behaviour

4.6.1 Annual customer survey data for Porthcawl is currently unavailable due to resource constraints. However, as mentioned in the Bridgend town centre health check, in late 2002 Colliers CRE consultancy undertook a retail needs assessment of the County Borough. Part of their research included a survey of shopping habits within the County Borough. The key findings of this survey for shopping habits in Porthcawl are as follows (all figures, except where stated otherwise relate to non-bulky comparison goods shopping):

- 27.5% shop in Porthcawl more than once a week, 25.6% shop there once a week and only 3.3% shop there once a fortnight.
- 77.1% of those who use Porthcawl Town Centre as their main destination, do so because it is close to home/convenient, 13% because it is easy to park there and only 2.7% it has a good choice of shops/goods.
- 45.7% of shoppers arrive by car, 21.3% by bus, 0% by train and 32.6% walk
- Origin of trips - All shoppers had started their journey from home. No one interviewed had visited the centre from work.
- 54% of shoppers travel 5 minutes or less to get to Porthcawl, 27% travel 6 to 10 minutes and 13.2% travel 11 to 15 minutes,
- For convenience goods shopping, the average weekly household expenditure for those conducting their main shopping trip in Porthcawl Town Centre was £44.

4.6.2 The primary catchment area of Porthcawl is very localised. The findings suggest that the centre is pre-dominantly used for incidental goods or top-up shopping. The localised nature of the catchment means that Porthcawl is dependent on a range of shoppers who are less affluent and less mobile. It therefore has a retail expenditure which is relatively low.

4.6.3 The above findings suggest that Porthcawl town centre is rated poorly for those criteria which matter most to shoppers, such as its range of goods and is used more because it is seen as a convenient shopping centre.

4.6.4 The 1998 Retail Study conducted by CEL consultants on Porthcawl, involved asking shoppers which types of shop they would most like to see more of or improved within the town. The results showed that many shoppers suggested improvements in provision of clothes stores, but the most popular improvement would be to supermarkets. Marks and Spencer was cited by nearly 35% of survey respondents as their first choice to be represented in the town. Supermarkets such as Tesco and Sainsbury featured second, with one in four respondents mentioning a supermarket retailer as their most wanted addition.

4.7 ENVIRONMENTAL QUALITY

4.7.1 The environmental quality of Porthcawl town centre appears to be of a reasonably high standard, especially in the core area in John Street. Porthcawl also has an attractive promenade, providing high quality sea views, which attract a high number of visitors, particularly in the summer season and at weekends. Environmental quality in terms of 'street-scape' is especially good in John Street. This has dramatically improved since the 1994 pedestrianisation scheme, giving pedestrians priority over vehicles for the main part of the shopping day. The street furniture (i.e. benches and monuments) and lighting along John Street sympathetically amalgamate with each other. This amalgamation reflects and blends with the historical connections and maritime feel of the area. Further, there is very little clutter, litter and graffiti in the town centre. However, there is poor provision for greenery within the town centre, especially within the pedestrianised portion of John Street. Improvements in this area could include the planting of small trees and shrubs, which would considerably enhance the shopper environment.

4.8 PERCEPTION OF SAFETY / OCCURRENCE OF CRIME

4.8.1 At present, it is not possible to assess the level of crime in Porthcawl town centre, due to the fact that the Police Authority do not collect information on town centre / car park related crime.

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

4.9 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 over the past 4 years i.e. an increase of £1 per annum and are above those for Maesteg. Figures for secondary retail rents were unavailable at the time of the study.
- Office rents in Porthcawl are also higher than those in other comparable centres within the County Borough i.e. Maesteg.
- Over the past 4 years there has been a significant increase in service sector outlets and a slight decrease in both comparison and

convenience outlets. However, within the town centre, comparison outlets dominate the number of occupied units.

- The vacancy rate in Porthcawl is 4.5%, which is well below the national average of 12%.
- The majority of premises in Porthcawl town centre (50.94%) have a floorspace area of less than 1,000 sq. ft.
- There is limited multiple retail offer within Porthcawl. The shape and size of existing units impose restrictions on large multiple retailers from locating in the town.
- The town is widely accessible by all forms of transport, however there is a deficiency in the rail mode.
- There is generally good car-parking provision for shoppers within the town.
- The environmental quality of the town has been enhanced in recent years from public sector investment i.e. through pedestrianisation and the provision of street furniture.

4.9.2 The analysis of shopper behaviour and attitudes conducted in this health check gives strong indications of the town's vitality and viability. The results in section six point to the fact that Porthcawl is a relatively unimportant retail centre within the sub-region. The town's retail economy is supported by an extremely localised catchment area, which is used heavily for incidental goods or top-up shopping. Porthcawl is rated poorly for its quality and range of goods. Only 2.7% of those who shop in Porthcawl do so, because there is a good choice of shops/goods there. From these results, it is fair to say that Porthcawl town centre does not have the same level of retail attractiveness as nearby centres such as Bridgend, Swansea or Cardiff. Within Porthcawl, it can be assumed that there is significant leakage in retail expenditure to these major centres. The erosion of its position as a tourist centre has to some extent, caused the town's low level of retail attractiveness. The 1998 CEL consultant's retail study however, established the need for a new modern food store within the town. They suggested that significant investment in retail offer was necessary to stem the decline of the town centre relative to its strong competitor centres and to ensure Porthcawl's long-term vitality and viability.

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

MAESTEG TOWN CENTRE HEALTH CHECK 2002

5.1 INTRODUCTION

5.1.1 Maesteg is the main shopping centre in the Llynfi Valley located in the northern part of the County Borough. It is located about 8 miles to the north of Bridgend town and is approximately 7 miles from junction 36 of the M4. There is a railway station with direct trains to Cardiff and connections to the main Cardiff – London line at Bridgend.

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

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

5.1.4 It is recognised that for small towns there is a general scarcity of readily available data and information, particularly of the property development kind. It is therefore not possible to produce an analysis as comprehensive as in the case of a medium to large size town such as Bridgend and Cardiff.

5.1.5 Vitality and viability data of the property development type such as rental values and capital yield are normally more widely available for larger centres where many transactions take place.

5.2 PROPERTY MARKET INDICATORS

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

5.2.2 Zone A prime retail rents for Maesteg compared to other centres are shown in table 6 below:

	£ sq ft
Maesteg	20
Bridgend	60
Porthcawl	27
Neath	70
Port Talbot	45
Pontypridd	50
Merthyr Tydfil	60
Cardiff	240
Swansea	105

Table 6

Sources: Colliers CRE and Cooke & Arkwright

5.2.3 The table shows clearly where Maesteg stands in comparison with other centres. Because of the lack of available information it is not possible to assess the changes in Zone A prime rents on a comparable basis over time. However in 2002 the average prime rental value for Maesteg is estimated to be in the low £20 per sq. ft., this is much lower than in other centres in the table. This indicates weak demand for retail space by retailers and investors. This is reflective of Maesteg's much lower role in the retail hierarchy compared to other bigger centres such as Bridgend or the super prime centres such as Cardiff. It also underlies Maesteg's smaller catchment area.

5.2.4 Maesteg does, however, function as an important town centre providing a range of residential, retail, service and community facilities, serving the Llynfi Valley and surrounding area. It however does not attract retailers trading in the growing areas of young fashion, multi-media and life style comparison products. Such retailers normally seek town centres where catchment populations are large. This tends to depress rental values and highlights Maesteg's subordinate role as a comparison goods centre.

5.2.5 No information is available for Maesteg to enable an assessment of the degree of investor confidence in the area. It is not one of the centres included by Experian Goads Retail Centre Ranking which assesses the vitality and attractiveness of a centre by combining a number of factors of the retail criteria type.

5.2.6 It is estimated by Cooke and Arkwright property development surveyors that rents for office space in Maesteg range from £5 per sq. ft. in the secondary frontages to £8 per sq. ft. in the prime frontages which is lower than in Bridgend and Porthcawl. Demand for office space is very weak. Office employment does not play a significant part in the business economy of Maesteg. From information supplied by local surveyors it is felt that there is generally an oversupply of retail space, and virtually no demand for redundant space above shops.

5.3 DIVERSITY OF USES

5.3.1 The information in the table 7 below is taken from a retail landuse survey of the Maesteg Commercial area undertaken in December 2002 (see Chapter 6). The table shows the composition of the town centre.

	No.	%	GB Average %
Convenience	10	6.60	9.39
Comparison	59	35.76	49.09
Services	47	28.48	29.18

Table 7

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

5.3.2 Comparison goods outlets account for 35% of Maesteg town centre's stock of retail/service uses which is a lower proportion than the national average of 49%, and again underlines Maestegs status within the retail hierarchy. By comparison service sector uses account for about a third (28%) of all outlets. This is close to the national average of 29.18% and provides the strongest indication of its relative attraction in meeting food and drink demand, where the uses are concentrated in the secondary frontages of Commercial Street. There is a strong indication of demand for professional and financial services which is drawn from a wider catchment area.

5.3.3 Compared to the national average in terms of numbers Maesteg town has fewer convenience goods outlets. The convenience goods sector does, however satisfy a main shopping need particularly in the food sector where there are a number of supermarkets including Somerfield, Aldi and Iceland. The fortunes of the town centre are however to a large extent dependant upon the survival of independent retailers.

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

	Floorspace Sq. Ft.	%	National Average (%)
Convenience	34,100	13.25	14.96
Comparison	91,149	35.41	54.64
Services	56,489	21.94	20.44
TOTAL	**181,738**		

Table 8

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

5.3.5 It is estimated that the convenience/comparison/services outlets which total 116 cover an area of approximately 181,738 sq. ft. This total is considerably smaller than Bridgend's which has a total floorspace area of approximately 600,000 sq. ft. of retail provision.

5.3.6 The most significant trend which can be deduced from Table 8 above is the smaller size of the comparison goods shopping proportion which stands at about 20% less than the national average provision. This clearly shows an under-representation of comparison shopping, particularly of the footwear and fashion type. This also reveals that Maesteg is not a main centre for comparison shopping. It lacks a large department or variety store to secure its appeal. There is also an apparent absence of other key attractors and large multiple retailers. This absence clearly reduces Maesteg's attraction and its ability to retain expenditure and expand its catchment area.

5.4 RETAILER REPRESENTATION

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

Somerfield	Boots	Iceland	Aldi
Woolworths	Shoefayre	New Look	Blockbuster
Greggs	Argos	Spar	Seconds Ahead

5.4.2 New Look is a recognised key attractor in Goad town centre reports. Maesteg has also got a good selection and range of service outlets, particularly in the financial and banking sectors. The following national service providers are represented.

HSBC	National Westminster Bank	Principality
Lloyds TSB	Lunn Policy	

5.4.3 In terms of convenience goods Maesteg contains 2 Somerfield supermarkets although one is temporarily closed due to fire damage, together with 3 bakers, 2 grocers and 2 butchers.

5.4.4 The market with its stalls also plays an important role in the life of the town, and in the diversification of the retail facilities on offer.

Vacant Floorspace

No.	%	National Average (%)
24	14.54	10.89

Table 9

Sources: Bridgend Retail Survey and Goad Town Centre Reports

5.4.5 The vacancy rate of 14.54% is above the national average of 10.89%. Much of the vacant floorspace is located in the secondary frontage of

Commercial Street, where there are several properties which exist in poor physical conditions.

5.5 ACCESSIBILITY

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

5.5.2 In terms of road transport , the principal road accesses to the centre are the A4063 and the B4282. The A4063 provides access north to Caerau and south to Bridgend and the M4 motorway. The B4282 provides access westwards to Port Talbot. At present there is little access provision to cyclists and pedestrians. There are however many residential properties within and adjoining the commercial area, and consequently there is an extensive walk in catchment area. There is ample, but time limited on-street car parking within the centre, such as on Commercial Street.

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

5.6 PEDESTRIAN FLOWS

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

5.7 ENVIRONMENTAL QUALITY

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

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

5.7.3 Maesteg is currently in the early stages of a regeneration programme designed to enhance its physical appearance and townscape. The County Borough Council is assisting in the accessing and management of grant schemes aimed at environmental improvements such as Town Improvement Grants, Commercial Improvement Area scheme, and Townscape Heritage Initiative funded by the Heritage Lottery Fund. A start has already been made with the establishment of The Maesteg Conservation Area which covers the commercial core. The designation will result in greater control over the design of buildings and public realm improvements. Projects planned for the commercial area include the introduction of furnished pedestrian areas with improved signage, lighting and new planting, as well as improving access for buses and cyclists.

5.8 CUSTOMER VIEWS AND BEHAVIOUR

5.8.1 In October 2002 Colliers CRE research consultancy undertook a household shopper telephone survey of the Bridgend areas. A total of 1000 interviews were conducted in thirteen different locations, 77 of the interviews were of households in the Maesteg area. The findings were as follows:-

- 51% of respondents visited Maesteg town centre for their main convenience goods shopping.
- 47% of respondents visited Bridgend town centre and the retail parks for bulky comparison goods shopping.
- 77% visited Maesteg town centre at least once a week.
- The majority of respondents 45% used a car to travel to Maesteg for the main convenience goods shopping, 22% by bus and 12% walked.
- 73% chose to shop in Maesteg for their main shopping because it was close to home.

5.8.2 The above findings confirm Maesteg's role within the retail hierarchy as an important centre of convenience shopping, mainly used by shoppers within the local catchment area.

5.9 CONCLUSION

5.9.1 The assessment of Maesteg town centre clearly shows that it fulfils an important local role as a top-up shopping centre. It also has a localised role as a centre for the provision of a range of service and non-food shopping needs. It has a reasonably good mix of convenience / comparison and service sector uses. There is an indication that there could be a demand for professional and financial services from a wider catchment area. The vacancy rate is, however, above the national average. Much of the vacant floorspace is located in the secondary frontage Commercial Street. The environmental quality is generally fairly good and the town clearly continues to attract shoppers from the local catchment.

5.9.2 The centre's appeal has recently been strengthened following the edge of centre Aldi/Argos development. The likely attraction of a new supermarket on the rugby ground site will add to the centre's vitality and viability. Financial assistance to property owners through the various grant schemes should see improvements to the building fabric. This together with public sector investment in the public realm should see a vastly improved built environment. Enhancement of the physical environment of the town centre should therefore be a priority and a key to increasing the attractiveness of Maesteg as a valued centre for shopping, entertainment and cultural activities.

6.1 INTRODUCTION

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

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

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

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

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

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

6.1.4 This survey was conducted in December 2002 and, whilst all floors of properties were surveyed, in line with other commercially provided data, <u>all figures relate to ground floor uses only</u>. In addition to this data, also included in this section are GIS based maps similar to those available commercially, but produced by the Local Planning Authority. These give an effective visual presentation of the vitality and viability of the centres by immediately highlighting areas which are rich in commercial activity and those which are not with high levels of vacancies or non-retail uses.

BRIDGEND TOWN CENTRE	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	467	888,593
Total Service / Convenience / Comparison / Vacant	371	746,391
Total Other	96	142,202
Total Vacant	57	91,472
% Vacant	12.20%	10.29%
Total Convenience	13	39,417
% Convenience	2.78%	4.44%
Total Comparison	145	322,078
% Comparison	31.05%	36.25%
Total Service	156	293,424
% Service	33.40%	33.02%
Convenience Goods		
Bakers & Confectioners	5	4,746
Butchers & Poulters	1	463
Grocery	5	32,766
Off licences / Confectioners / Tobacconists / Newsagents	2	1,442
Total	**13**	**39,417**
Comparison Goods		
Footwear and Repair	6	8,676
Mens and Boys Wear	4	5,210
Womens, Girls, Children and General Wear	26	65,929
Furniture, carpets & textiles	13	20,990
Booksellers, arts, crafts, stationers, copy bureaux	9	14,466
Electrical, gas, music & photographic	20	25,145
DIY, hardware & housewares	6	12,195
China, glass, fancy & leather goods	6	4,973
Cars, motorcycles & motor accessories	1	1,615
Chemists, drug stores & opticians	13	26,995
Variety, department & catalogue	7	69,847
Florists, nurserymen & seedsmen	3	3,251
Toys, hobby, cycle & sports	9	13,347
Jewellers & repair	9	7,050
Other	13	42,400
Total	**145**	**322,078**
Service		
Restaurants, coffee bars, fast food & takeaways	36	46,080
Pub / Club	18	61,074
Hairdressers, beauty parlours & health centres	20	12,733
Laundries and Dry Cleaners	1	818
Travel Agents	7	8,364
Banks, Building Societies and Financial Services	25	41,818
Estate Agents and Valuers	13	16,749
Professional Services	13	18,234
Other	23	87,554
Total	**156**	**293,424**
Distribution of Outlets by Size		
Under 1,000 sq ft.	220	47.11%
Between 1,000 and 2,499 sq. ft.	162	34.69%
Between 2,500 and 4,999 sq. ft.	49	10.49%
Between 5,000 and 9,999 sq. ft.	23	4.93%
Between 10,000 and 14,999 sq. ft.	9	1.93%
Between 15,000 and 19,999 sq. ft.	3	0.64%
Between 20,000 and 29,999 sq ft.	1	0.21%
30,000 sq. ft. and above	0	0.00%
Total	**467**	**100.00%**

PORTHCAWL TOWN CENTRE	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	267	403,421
Total Service / Convenience / Comparison / Vacant	164	216,419
Total Other	103	187,002
Total Vacant	12	24,499
% Vacant	4.50%	6.07%
Total Convenience	12	35,822
% Convenience	4.50%	8.88%
Total Comparison	73	101,041
% Comparison	27.34%	25.05%
Total Service	67	79,556
% Service	25.09%	19.72%
Convenience Goods		
Bakers & Confectioners	3	3,122
Butchers & Poulters	2	3,003
Grocery	5	27,394
Off licences / Confectioners / Tobacconists / Newsagents	2	2,303
Total	**12**	**35,822**
Comparison Goods		
Footwear and Repair	4	5,630
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	16	23,777
Furniture, carpets & textiles	7	10,193
Booksellers, arts, crafts, stationers, copy bureaux	8	7,481
Electrical, gas, music & photographic	6	4,725
DIY, hardware & housewares	3	3,574
China, glass, fancy & leather goods	1	732
Cars, motorcycles & motor accessories	1	2,530
Chemists, drug stores & opticians	7	11,819
Variety, department & catalogue	4	13,509
Florists, nurserymen & seedsmen	0	0
Toys, hobby, cycle & sports	3	2,271
Jewellers & repair	4	5,145
Other	9	9,655
Total	**73**	**101,041**
Service		
Restaurants, coffee bars, fast food & takeaways	21	27,760
Pub / Club	4	8,460
Hairdressers, beauty parlours & health centres	10	7,449
Laundries and Dry Cleaners	2	1,970
Travel Agents	5	5,371
Banks, Building Societies and Financial Services	7	10,721
Estate Agents and Valuers	6	4,693
Professional Services	8	7,965
Other	4	5,167
Total	**67**	**79,556**
Distribution of Outlets by Size		
Under 1,000 sq ft.	136	50.94%
Between 1,000 and 2,499 sq. ft.	101	37.83%
Between 2,500 and 4,999 sq. ft.	20	7.49%
Between 5,000 and 9,999 sq. ft.	8	3.00%
Between 10,000 and 14,999 sq. ft.	1	0.37%
Between 15,000 and 19,999 sq. ft.	0	0.00%
Between 20,000 and 29,999 sq ft.	1	0.37%
30,000 sq. ft. and above	0	0.00%
Total	**267**	**100.00%**

MAESTEG TOWN CENTRE	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	165	257,430
Total Service / Convenience / Comparison / Vacant	140	204,730
Total Other	25	52,700
Total Vacant	24	22,992
% Vacant	14.54%	8.93%
Total Convenience	10	34,100
% Convenience	6.06%	13.25%
Total Comparison	59	91,149
% Comparison	35.76%	35.41%
Total Service	47	56,489
% Service	28.48%	21.94%
Convenience Goods		
Bakers & Confectioners	3	2,874
Butchers & Poulters	2	1,335
Grocery	4	29,460
Off licences / Confectioners / Tobacconists / Newsagents	1	431
Total	**10**	**34,100**
Comparison Goods		
Footwear and Repair	4	4,424
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	9	12,777
Furniture, carpets & textiles	6	7,524
Booksellers, arts, crafts, stationers, copy bureaux	2	2,056
Electrical, gas, music & photographic	4	2,723
DIY, hardware & housewares	3	3,520
China, glass, fancy & leather goods	3	6,824
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	9	9,784
Variety, department & catalogue	5	23,336
Florists, nurserymen & seedsmen	2	1,270
Toys, hobby, cycle & sports	4	4,445
Jewellers & repair	1	431
Other	7	12,035
Total	**59**	**91,149**
Service		
Restaurants, coffee bars, fast food & takeaways	15	16,932
Pub / Club	4	6,157
Hairdressers, beauty parlours & health centres	6	3,541
Laundries and Dry Cleaners	1	3,660
Travel Agents	3	2,691
Banks, Building Societies and Financial Services	8	14,445
Estate Agents and Valuers	3	3,057
Professional Services	3	1,884
Other	4	4,122
Total	**47**	**56,489**
Distribution of Outlets by Size		
Under 1,000 sq ft.	76	46.06%
Between 1,000 and 2,499 sq. ft.	64	38.79%
Between 2,500 and 4,999 sq. ft.	19	11.52%
Between 5,000 and 9,999 sq. ft.	3	1.82%
Between 10,000 and 14,999 sq. ft.	2	1.21%
Between 15,000 and 19,999 sq. ft.	1	0.61%
Between 20,000 and 29,999 sq ft.	0	0.00%
30,000 sq. ft. and above	0	0.00%
Total	**165**	**100.00%**

ABERKENFIG	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	86	101,827
Total Service / Convenience / Comparison / Vacant	43	59,266
Total Other (includes Residential Properties & Community Facilities etc.)	43	42,561
Total Vacant	0	0
% Vacant	0.00%	0.00%
Total Convenience	5	6,168
% Convenience	5.81%	6.06%
Total Comparison	19	25,209
% Comparison	22.09%	24.76%
Total Service	19	27,889
% Service	22.09%	27.39%
Convenience Goods		
Bakers & Confectioners		
Butchers & Poulters	1	1,464
Grocery	3	3,832
Off licences / Confectioners / Tobacconists / Newsagents	1	872
Total	**5**	**6,168**
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	2	1,421
Furniture, carpets & textiles	6	8,471
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	2	1,981
DIY, hardware & housewares	1	1,776
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	1	1,970
Variety, department & catalogue	0	0
Florists, nurserymen & seedsmen	1	377
Toys, hobby, cycle & sports	4	5,889
Jewellers & repair	0	0
Other	2	3,324
Total	**19**	**25,209**
Service		
Restaurants, coffee bars, fast food & takeaways	7	13,724
Pub / Club	3	6,060
Hairdressers, beauty parlours & health centres	4	3,281
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	2	2,293
Estate Agents and Valuers	0	0
Professional Services	1	75
Other	2	2,456
Total	**19**	**27,889**
Distribution of Outlets by Size		
Under 1,000 sq ft.	49	56.98%
Between 1,000 and 2,499 sq. ft.	31	36.05%
Between 2,500 and 4,999 sq. ft.	4	4.65%
Between 5,000 and 9,999 sq. ft.	2	2.33%
Between 10,000 and 14,999 sq. ft.	0	0.00%
Between 15,000 and 19,999 sq. ft.	0	0.00%
Between 20,000 and 29,999 sq ft.	0	0.00%
30,000 sq. ft. and above	0	0.00%
Total	**86**	**100.00%**

6.2 ABERKENFIG

6.2.1 The Established Commercial Centre (ECC) of Aberkenfig is located within the Mid Ogwr Policy area of the adopted Ogwr Borough Local Plan (1995). The centre occupies a central location within the County Borough just south of Tondu and north of the M4. It is located within close proximity of and has a good link road to, Junction 36 at Sarn. At the census in 1991, Aberkenfig had a population of 1,162 persons, but the centre obviously attracts patronage from a wider catchment area.

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

6.2.3 The results of the 2002 ECC survey for Aberkenfig show that out of the 86 properties surveyed, there is an even split between the number of those units engaging in commercial and non- commercial activity. Comparison goods outlets and service goods outlets dominate the centre and both separately account for 44.18% of all properties. Convenience goods outlets account for the smallest share, in that only 5.81% of all outlets sold such goods. Figures for these 3 different uses closely follow those which have been compiled at the County Borough wide level. The centre contained no vacant properties at the time of the study, indicating that its local vitality and viability was high.

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

BLAENGARW	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	33	100,255
Total Service / Convenience / Comparison / Vacant	14	55,315
Total Other (includes Residential Properties & Community Facilities etc.)	19	44,940
Total Vacant	6	3,886
% Vacant	18.18%	3.88%
Total Convenience	2	2,497
% Convenience	6.06%	2.49%
Total Comparison	2	1,345
% Comparison	6.06%	1.34%
Total Service	4	6,135
% Service	12.12%	6.12%
Convenience Goods		
Bakers & Confectioners	0	0
Butchers & Poulters	0	0
Grocery	1	1,700
Off licences / Confectioners / Tobacconists / Newsagents	1	797
Total	**2**	**2,497**
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	1	506
Furniture, carpets & textiles	0	0
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	0	0
DIY, hardware & housewares	0	0
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	0	0
Variety, department & catalogue	0	0
Florists, nurserymen & seedsmen	0	0
Toys, hobby, cycle & sports	0	0
Jewellers & repair	0	0
Other	1	839
Total	**2**	**1,345**
Service		
Restaurants, coffee bars, fast food & takeaways	2	1,248
Pub / Club	1	4,446
Hairdressers, beauty parlours & health centres	1	441
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	0	0
Estate Agents and Valuers	0	0
Professional Services	0	0
Other	0	0
Total	**4**	**6,135**
Distribution of Outlets by Size		
Under 1,000 sq ft.	27	81.82%
Between 1,000 and 2,499 sq. ft.	3	9.09%
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%**

6.3 BLAENGARW

6.3.1 The Community Shopping Centre of Blaengarw is a small, isolated ECC, comprising only 33 properties in total. The centre is located at the far north of the Garw Valley, within the County Borough. At the census in 1991, Blaengarw had a population of 1,866 persons.

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

6.3.3 The small number of properties in this centre, coupled with the fact that there are only 8 properties which are engaged in commercial activity suggest that it has a very localised catchment area.

6.3.4 The 2002 ECC survey for this centre showed that the centre is over-represented by vacant properties, in that there were 6 vacant units, 4 service outlets, 2 outlets selling convenience goods and a further 2 outlets selling comparison goods. Of the commercial activity that exists in the centre, it can be seen that the service sector is the dominant player, this mainly consisting of A3 outlets. 81% of units within the centre are under 1, 000 sq. ft. in size which is characteristic of a community shopping centre in a predominantly residential area.

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

BRACKLA	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	16	44,263
Total Service / Convenience / Comparison / Vacant	14	29,775
Total Other (includes Residential Properties & Community Facilities etc.)	2	14,488
Total Vacant	0	0
% Vacant	0.00%	0.00%
Total Convenience	4	18,181
% Convenience	25.00%	41.07%
Total Comparison	3	4,209
% Comparison	18.75%	9.51%
Total Service	7	7,385
% Service	43.75%	16.68%
Convenience Goods		
Bakers & Confectioners	1	1,066
Butchers & Poulters	0	0
Grocery	1	13,950
Off licences / Confectioners / Tobacconists / Newsagents	2	3,165
Total	**4**	**18,181**
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	1	1,044
Furniture, carpets & textiles	0	0
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	0	0
DIY, hardware & housewares	0	0
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	2	3,165
Variety, department & catalogue	0	0
Florists, nurserymen & seedsmen	0	0
Toys, hobby, cycle & sports	0	0
Jewellers & repair	0	0
Other	0	0
Total	**3**	**4,209**
Service		
Restaurants, coffee bars, fast food & takeaways	3	3,165
Pub / Club	0	0
Hairdressers, beauty parlours & health centres	1	1,098
Laundries and Dry Cleaners	1	969
Travel Agents	0	0
Banks, Building Societies and Financial Services	0	0
Estate Agents and Valuers	1	1,130
Professional Services	0	0
Other	1	1,023
Total	**7**	**7,385**
Distribution of Outlets by Size		
Under 1,000 sq ft.	1	6.25%
Between 1,000 and 2,499 sq. ft.	12	75.00%
Between 2,500 and 4,999 sq. ft.	0	0.00%
Between 5,000 and 9,999 sq. ft.	2	12.50%
Between 10,000 and 14,999 sq. ft.	1	6.25%
Between 15,000 and 19,999 sq. ft.	0	0.00%
Between 20,000 and 29,999 sq ft.	0	0.00%
30,000 sq. ft. and above	0	0.00%
Total	**16**	**100.00%**

6.4 BRACKLA

6.4.1 The ECC of Brackla is a relatively small, “healthy” community shopping centre, known as the ‘Triangle’ Centre and is located to the east of Bridgend Town Centre. At the census in 1991, Brackla had a population of 8,109 persons, but since that time the Community has been developed and now probably has a population of nearer 10, 000 people.

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

6.4.3 The centre is made up of only 16 properties in total and is dominated by service sector outlets which account for over 43% of all properties surveyed in the 2002 ECC survey for Brackla (i.e. 7units). There are 4 units selling convenience goods and only 3 units selling comparison goods. There were no vacant units at the time of the study, this indicates that the centre has high levels of vitality and viability. This is further supported by a recent planning application which is currently before the Council for additional retail units at the centre.

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

CAERAU	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	54	48,825
Total Service / Convenience / Comparison / Vacant	20	23,540
Total Other (includes Residential Properties & Community Facilities etc.)	34	25,285
Total Vacant	4	4,036
% Vacant	7.41%	8.27%
Total Convenience	2	2,863
% Convenience	3.70%	5.86%
Total Comparison	4	3,563
% Comparison	7.41%	7.30%
Total Service	10	13,078
% Service	18.52%	26.79%
Convenience Goods		
Bakers & Confectioners	0	0
Butchers & Poulters	0	0
Grocery	2	2,863
Off licences / Confectioners / Tobacconists / Newsagents	0	0
Total	**2**	**2,863**
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	0	0
Furniture, carpets & textiles	0	0
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	0	0
DIY, hardware & housewares	0	0
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	2	1,669
Variety, department & catalogue	0	0
Florists, nurserymen & seedsmen	0	0
Toys, hobby, cycle & sports	0	0
Jewellers & repair	0	0
Other	2	1,894
Total	**4**	**3,563**
Service		
Restaurants, coffee bars, fast food & takeaways	4	2,809
Pub / Club	2	6,620
Hairdressers, beauty parlours & health centres	1	592
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	0	0
Estate Agents and Valuers	0	0
Professional Services	0	0
Other	3	3,057
Total	**10**	**13,078**
Distribution of Outlets by Size		
Under 1,000 sq ft.	43	79.63%
Between 1,000 and 2,499 sq. ft.	8	14.81%
Between 2,500 and 4,999 sq. ft.	3	5.56%
Between 5,000 and 9,999 sq. ft.	0	0.00%
Between 10,000 and 14,999 sq. ft.	0	0.00%
Between 15,000 and 19,999 sq. ft.	0	0.00%
Between 20,000 and 29,999 sq ft.	0	0.00%
30,000 sq. ft. and above	0	0.00%
Total	**54**	**100.00%**

6.5 CAERAU

6.5.1 The ECC of Caerau is located in the Llynfi Valley, to the north of Nantyffyllon. The commercial area of Caerau is made up of 54 properties, and is therefore relatively small. The boundary mainly includes properties along Caerau Road and Dyffryn Road. At the census in 1991, Caerau had a population of 4,751 persons.

6.5.2 The results of the 2002 ECC survey shows that Caerau is dominated by residential properties and has more commercial properties providing services than properties selling convenience or comparison goods. Out of the properties surveyed, 34 were residential properties, 10 service outlets, 4 comparison goods units and 2 convenience goods units. Only 4 units are currently vacant within the ECC, resulting in a vacancy rate of 7.41%.

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

NANTYFFYLLON	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	84	64,196
Total Service / Convenience / Comparison / Vacant	13	17,115
Total Other (includes Residential Properties & Community Facilities etc.)	71	47,081
Total Vacant	4	7,675
% Vacant	4.76%	11.96%
Total Convenience	4	4,015
% Convenience	4.76%	6.25%
Total Comparison	2	2,067
% Comparison	2.38%	3.22%
Total Service	3	3,358
% Service	3.57%	5.23%
Convenience Goods		
Bakers & Confectioners	0	0
Butchers & Poulters	0	0
Grocery	3	3,079
Off licences / Confectioners / Tobacconists / Newsagents	1	936
Total	4	4,015
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	0	0
Furniture, carpets & textiles	0	0
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	0	0
DIY, hardware & housewares	0	0
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	1	915
Chemists, drug stores & opticians	0	0
Variety, department & catalogue	0	0
Florists, nurserymen & seedsmen	0	0
Toys, hobby, cycle & sports	0	0
Jewellers & repair	0	0
Other	1	1,152
Total	**2**	**2,067**
Service		
Restaurants, coffee bars, fast food & takeaways	1	840
Pub / Club	1	1,883
Hairdressers, beauty parlours & health centres	1	635
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	0	0
Estate Agents and Valuers	0	0
Professional Services	0	0
Other	0	0
Total	**3**	**3,358**
Distribution of Outlets by Size		
Under 1,000 sq ft.	69	84.15%
Between 1,000 and 2,499 sq. ft.	11	13.41%
Between 2,500 and 4,999 sq. ft.	2	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	**84**	**100.00%**

6.6 NANTYFFYLLON

6.6.1 The ECC of Nantyffyllon is located just north of Maesteg and to the south of Caerau within the Llynfi Valley. At the census in 1991, Nantyfyllon had a population of 1,162 persons.

6.6.2 The commercial area of Nantyffyllon is a relatively small centre and is made up of only 84 properties in total. The linear ECC boundary of Nantyffyllon runs from north to south encompassing buildings along the southern part of Picton Street, properties on the western side of Grove Street and properties along the eastern side of High Street.

6.6.3 Nantyffyllon's commercial centre is dominated by residential properties which account for 68 out of the 84 surveyed properties. There is very little commercial activity occurring within the designated boundary. From looking at the statistics, it can be seen that there are more convenience outlets than comparison and service sector outlets. However, there are just as many vacant outlets as convenience goods outlets. This indicates that Nantyffyllon is a relatively weak centre, serving as a local convenience facility only.

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

NANTYMOEL	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	120	133,419
Total Service / Convenience / Comparison / Vacant	32	47,974
Total Other (includes Residential Properties & Community Facilities etc.)	88	85,445
Total Vacant	14	26,974
% Vacant	11.67%	20.22%
Total Convenience	7	8,310
% Convenience	5.83%	6.23%
Total Comparison	5	4,133
% Comparison	4.17%	3.10%
Total Service	6	8,557
% Service	5.00%	6.41%
Convenience Goods		
Bakers & Confectioners	1	570
Butchers & Poulters	1	570
Grocery	3	6,094
Off licences / Confectioners / Tobacconists / Newsagents	2	1,076
Total	**7**	**8,310**
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	1	872
Furniture, carpets & textiles	0	0
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	0	0
DIY, hardware & housewares	1	958
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	1	678
Variety, department & catalogue	0	0
Florists, nurserymen & seedsmen	0	0
Toys, hobby, cycle & sports	0	0
Jewellers & repair	0	0
Other	2	1,625
Total	**5**	**4,133**
Service		
Restaurants, coffee bars, fast food & takeaways	2	1,055
Pub / Club	2	6,275
Hairdressers, beauty parlours & health centres	2	1,227
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	0	0
Estate Agents and Valuers	0	0
Professional Services	0	0
Other	0	0
Total	**6**	**8,557**
Distribution of Outlets by Size		
Under 1,000 sq ft.	92	76.67%
Between 1,000 and 2,499 sq. ft.	18	15.00%
Between 2,500 and 4,999 sq. ft.	5	4.17%
Between 5,000 and 9,999 sq. ft.	5	4.17%
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	**120**	**100.00%**

6.7 NANTYMOEL

6.7.1 The ECC of Nantymoel serves as a community shopping centre for the northern part of the Ogmore Valley. The commercial area of Nantymoel is split into three separate centres. At the census in 1991, Nantymoel had a population of 2,482 persons.

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

6.7.3 The 2002 ECC survey for this centre showed that there were 14 vacant units compared to 7 outlets selling convenience goods, 6 service sector outlets and 5 outlets selling comparison goods. This high vacancy rate may indicate that the centre has low levels of vitality and viability, alternatively it may indicate rapid turnover or transience in business activities. The accompanying statistics and plan of Nantymoel, show that residential dwellings occupy the highest number of properties within the commercial area.

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

OGMORE VALE	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	145	134,796
Total Service / Convenience / Comparison / Vacant	41	52,548
Total Other (includes Residential Properties & Community Facilities etc.)	104	82,248
Total Vacant	15	16,813
% Vacant	10.35%	12.47%
Total Convenience	2	1,851
% Convenience	1.38%	3.52%
Total Comparison	9	12,658
% Comparison	6.20%	9.39%
Total Service	15	21,226
% Service	10.35%	15.75%
Convenience Goods		
Bakers & Confectioners	0	0
Butchers & Poulters	0	0
Grocery	1	1,184
Off licences / Confectioners / Tobacconists / Newsagents	1	667
Total	**2**	**1,851**
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	0	0
Furniture, carpets & textiles	3	6,878
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	1	1,119
DIY, hardware & housewares	0	0
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	2	2,207
Variety, department & catalogue	0	0
Florists, nurserymen & seedsmen	1	517
Toys, hobby, cycle & sports	0	0
Jewellers & repair	0	0
Other	2	1,937
Total	**9**	**12,658**
Service		
Restaurants, coffee bars, fast food & takeaways	4	5,780
Pub / Club	4	10,118
Hairdressers, beauty parlours & health centres	2	1,238
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	2	2,228
Estate Agents and Valuers	1	592
Professional Services	1	700
Other	1	570
Total	**15**	**21,226**
Distribution of Outlets by Size		
Under 1,000 sq ft.	113	77.93%
Between 1,000 and 2,499 sq. ft.	26	17.93%
Between 2,500 and 4,999 sq. ft.	6	4.14%
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	**145**	**100.00%**

6.8 OGMORE VALE

6.8.1 The ECC of Ogmore Vale is located within the Ogmore Valley, south of Nantymoel and to the north of Blackmill. At the census in 1991, Ogmore Vale had a population of 3,224 persons.

6.8.2 The designated commercial boundary for Ogmore Vale covers a relatively large area and includes properties in a number of streets rather than being confined to properties fronting onto one main street or road. The centre contains 26 commercial units and the boundary includes properties along High Street, Corbett Street, Bethania Row, River Street, Commercial Street and Tynewydd Row.

6.8.3 The results of the 2002 ECC survey show that Ogmore Vale has more commercial properties providing services than properties selling convenience or comparison goods. However, this only counts for just over 10% of all properties surveyed, which is also the same figure as the number of vacant properties within the centre. Convenience goods outlets account for the least number of properties in that only 1.38% of all properties sold such goods. This trend of a higher number of service sector outlets and lower number of convenience goods outlets closely allies to the general trend for all ECC's within the County Borough.

6.8.4 The attached plan and statistics show that Ogmore Vale's ECC is dominated by residential properties and that there are more residential properties located within the boundary than properties engaged in commercial activity. Out of the 145 properties surveyed, there were 15 service sector outlets, 9 comparison goods outlets, 2 convenience goods outlets and 99 residential properties. The ECC could be reviewed in the future to exclude the row of houses on the West Side of Corbett Street and the majority of properties along River Street.

PENCOED	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	90	90,783
Total Service / Convenience / Comparison / Vacant	68	61,322
Total Other (includes Residential Properties & Community Facilities etc.)	22	29,461
Total Vacant	8	7,147
% Vacant	8.88%	7.87%
Total Convenience	8	11,421
% Convenience	8.88%	12.58%
Total Comparison	19	13,369
% Comparison	21.11%	14.73%
Total Service	33	29,385
% Service	36.66%	32.37%
Convenience Goods		
Bakers & Confectioners	1	452
Butchers & Poulters	1	323
Grocery	4	8,752
Off licences / Confectioners / Tobacconists / Newsagents	2	1,894
Total	**8**	**11,421**
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	3	1,690
Furniture, carpets & textiles	3	3,261
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	2	1,076
DIY, hardware & housewares	0	0
China, glass, fancy & leather goods	2	1,130
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	3	2,766
Variety, department & catalogue	0	0
Florists, nurserymen & seedsmen	2	1,044
Toys, hobby, cycle & sports	2	1,206
Jewellers & repair	0	0
Other	3	1,196
Total	**19**	**13,369**
Service		
Restaurants, coffee bars, fast food & takeaways	7	7,728
Pub / Club	3	7,416
Hairdressers, beauty parlours & health centres	9	4,553
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	4	3,821
Estate Agents and Valuers	4	2,336
Professional Services	3	2,089
Other	3	1,442
Total	**33**	**29,385**
Distribution of Outlets by Size		
Under 1,000 sq ft.	64	71.11%
Between 1,000 and 2,499 sq. ft.	22	24.44%
Between 2,500 and 4,999 sq. ft.	3	3.33%
Between 5,000 and 9,999 sq. ft.	1	1.11%
Between 10,000 and 14,999 sq. ft.	0	0.00%
Between 15,000 and 19,999 sq. ft.	0	0.00%
Between 20,000 and 29,999 sq ft.	0	0.00%
30,000 sq. ft. and above	0	0.00%
Total	**90**	**100.00%**

6.9 PENCOED

6.9.1 The ECC of Pencoed is located within the main settlement of Pencoed, to the north of the M4, off Junction 35. Pencoed occupies a 'border/vale' location in the east of the County Borough just inside the authority's eastern boundary but has rail links to Bridgend and Cardiff via its station. At the census in 1991, Pencoed had a population of 9,276 persons.

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

6.9.3 The 2002 ECC study for Pencoed showed that the Centre contains more service sector outlets (36.6% of all properties) than outlets selling comparison goods (19% of all properties) and convenience goods (8% of all properties). This large number of service sector outlets is dominated by hairdressers / beauty / health centres.

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

PONTYCYMMER	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	119	100,255
Total Service / Convenience / Comparison / Vacant	53	55,315
Total Other (includes Residential Properties & Community Facilities etc.)	66	44,940
Total Vacant	14	15,640
% Vacant	11.76%	15.60%
Total Convenience	5	7,406
% Convenience	4.20%	7.39%
Total Comparison	18	14,381
% Comparison	15.13%	14.34%
Total Service	16	17,438
% Service	13.45%	17.39%
Convenience Goods		
Bakers & Confectioners	1	344
Butchers & Poulters	1	527
Grocery	3	6,535
Off licences / Confectioners / Tobacconists / Newsagents	0	0
Total	**5**	**7,406**
Comparison Goods		
Footwear and Repair	1	1,066
Mens and Boys Wear	1	1,249
Womens, Girls, Children and General Wear	3	2,669
Furniture, carpets & textiles	0	0
Booksellers, arts, crafts, stationers, copy bureaux	1	474
Electrical, gas, music & photographic	2	1,108
DIY, hardware & housewares	2	1,561
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	0	0
Chemists, drug stores & opticians	1	861
Variety, department & catalogue	1	936
Florists, nurserymen & seedsmen	1	431
Toys, hobby, cycle & sports	1	570
Jewellers & repair	0	0
Other	4	3,456
Total	**18**	**14,381**
Service		
Restaurants, coffee bars, fast food & takeaways	5	4,865
Pub / Club	2	5,576
Hairdressers, beauty parlours & health centres	3	1,485
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	4	4,725
Estate Agents and Valuers	0	0
Professional Services	1	452
Other	1	335
Total	**16**	**17,438**
Distribution of Outlets by Size		
Under 1,000 sq ft.	90	75.63%
Between 1,000 and 2,499 sq. ft.	24	20.17%
Between 2,500 and 4,999 sq. ft.	5	4.20%
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	**119**	**100.00%**

6.10 PONTYCYMMER

6.10.1 The ECC of Pontycymmer is located to the north of Pont-y-rhyl, and centrally positioned within the Garw Valley. Blaengarw lies further to the north. At the census in 1991, Pontycymmer had a population of 2,573 persons.

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

6.10.3 The 2002 ECC survey for Pontycymmer showed that over half of the properties within the boundary engage in non-commercial activity. Out of 119 properties surveyed, there are 66 non-commercial properties, these mainly being residential. Comparison goods outlets dominate the remaining 53 properties engaging in commercial activity and account for just over 15% of all properties, where as service sector outlets account for 13.45% and convenience outlets account for just over 4%. This low proportion of convenience outlets is the trend associated with most ECC's within the County Borough. The centre has 14 vacant units, giving a relatively high vacancy rate of 11.76%, which may indicate local vitality and viability of the centre is quite low, or alternatively that there is a rapid turnover or transience in business activity.

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

PYLE / KENFIG HILL	No. of Units	Gross Area (sq. ft.)
Total Properties Surveyed:	200	230,724
Total Service / Convenience / Comparison / Vacant	66	124,990
Total Other (includes Residential Properties & Community Facilities etc.)	134	105,734
Total Vacant	12	17,373
% Vacant	6.00%	7.53%
Total Convenience	5	55,574
% Convenience	2.50%	24.09%
Total Comparison	25	31,183
% Comparison	12.50%	13.52%
Total Service	24	20,860
% Service	12.00%	9.04%
Convenience Goods		
Bakers & Confectioners	0	0
Butchers & Poulters	1	657
Grocery	2	53,378
Off licences / Confectioners / Tobacconists / Newsagents	2	1,539
Total	**5**	**55,574**
Comparison Goods		
Footwear and Repair	0	0
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	2	1,808
Furniture, carpets & textiles	2	850
Booksellers, arts, crafts, stationers, copy bureaux	1	495
Electrical, gas, music & photographic	5	3,229
DIY, hardware & housewares	1	700
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	1	1,184
Chemists, drug stores & opticians	4	3,078
Variety, department & catalogue	2	13,282
Florists, nurserymen & seedsmen	1	743
Toys, hobby, cycle & sports	3	3,089
Jewellers & repair	0	0
Other	3	2,725
Total	**25**	**31,183**
Service		
Restaurants, coffee bars, fast food & takeaways	8	6,598
Pub / Club	0	0
Hairdressers, beauty parlours & health centres	4	2,992
Laundries and Dry Cleaners	0	0
Travel Agents	1	840
Banks, Building Societies and Financial Services	4	3,746
Estate Agents and Valuers	2	1,206
Professional Services	4	3,498
Other	1	1980
Total	**24**	**20,860**
Distribution of Outlets by Size		
Under 1,000 sq ft.	165	82.50%
Between 1,000 and 2,499 sq. ft.	29	14.50%
Between 2,500 and 4,999 sq. ft.	3	1.50%
Between 5,000 and 9,999 sq. ft.	1	0.50%
Between 10,000 and 14,999 sq. ft.	1	0.50%
Between 15,000 and 19,999 sq. ft.	0	0.00%
Between 20,000 and 29,999 sq ft.	0	0.00%
30,000 sq. ft. and above	1	0.50%
Total	**200**	**100.00%**

6.11 PYLE / KENFIG HILL

6.11.1 The commercial area of Pyle / Kenfig Hill is split into 2 separate centres. Strategically, both centres are closely located to the authority's western boundary. At the census in 1991, Pyle and Kenfig Hill had a population of 6,504 persons, but the ECC's catchment may additionally extend to parts of North Cornelly, which had a settlement population of 5,827 in 1991.

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

6.11.3 The statistics compiled for both parts of the ECC suggest that there is steady commercial activity occurring within them. Out of 200 properties surveyed, 54 of these were engaged in commercial activity. However, planning activity suggests that the vitality and viability of the part of the centre in Kenfig Hill, is encouraged by the dominance of residential properties. Kenfig Hill's commercial centre also has its fair share of vacant properties and has a vacancy rate of 6% (i.e. 12 properties) however this is lower than the general vacancy rate for the whole County Borough (9.22%). There are no vacant properties within Pyle Cross, indicating greater vitality and viability in this part of the centre which is anchored by the Co-op foodstore.

6.11.4 The number of units engaging in commercial activity is dominated by outlets selling comparison goods (12.5%) and service sector outlets (12%), where as convenience goods outlets only account for 2.5% of all properties surveyed. However, convenience goods occupy the largest area of gross floorspace (24.09%) despite this type of outlet accounting for the smallest number. This is explained by the sheer scale of convenience goods offered by the Co-operative Pioneer food store.

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

ESTABLISHED COMMERCIAL CENTRES BRIDGEND COUNTY BOROUGH	**No. of Units**	**Gross Area (Sq. ft.)**
Total Properties Surveyed:	1843	2,592,404
Total Service / Convenience / Comparison / Vacant	1035	1,668,208
Total Other (includes Residential Properties & Community Facilities etc.)	808	924,196
Total Vacant	170	229,960
% Vacant	9.22%	8.87%
Total Convenience	79	230,530
% Convenience	4.29%	8.89%
Total Comparison	382	614,899
% Comparison	20.73%	23.72%
Total Service	405	575,415
% Service	21.98%	62.38%
Convenience Goods		
Bakers & Confectioners	15	13,174
Butchers & Poulters	10	8,342
Grocery	37	193,892
Off licences / Confectioners / Tobacconists / Newsagents	17	15,122
Total	**79**	**230,530**
Comparison Goods		
Footwear and Repair	15	19,796
Mens and Boys Wear	4	5,598
Womens, Girls, Children and General Wear	65	111,589
Furniture, carpets & textiles	40	58,167
Booksellers, arts, crafts, stationers, copy bureaux	21	24,973
Electrical, gas, music & photographic	43	41,106
DIY, hardware & housewares	16	24,285
China, glass, fancy & leather goods	12	13,659
Cars, motorcycles & motor accessories	4	6,244
Chemists, drug stores & opticians	44	62,140
Variety, department & catalogue	19	125,312
Florists, nurserymen & seedsmen	11	7,633
Toys, hobby, cycle & sports	27	31,678
Jewellers & repair	14	12,626
Other	48	70,093
Total	**382**	**614,899**
Service		
Restaurants, coffee bars, fast food & takeaways	114	136,216
Pub / Club	42	113,408
Hairdressers, beauty parlours & health centres	66	46,206
Laundries and Dry Cleaners	5	7,417
Travel Agents	16	17,266
Banks, Building Societies and Financial Services	56	83,797
Estate Agents and Valuers	30	29,762
Professional Services	34	34,897
Other	42	106,446
Total	**405**	**575,415**
Distribution of Outlets by Size		
Under 1,000 sq ft.	1150	62.40%
Between 1,000 and 2,499 sq. ft.	503	27.29%
Between 2,500 and 4,999 sq. ft.	124	6.73%
Between 5,000 and 9,999 sq. ft.	42	2.28%
Between 10,000 and 14,999 sq. ft.	14	0.76%
Between 15,000 and 19,999 sq. ft.	5	0.27%
Between 20,000 and 29,999 sq ft.	2	0.11%
30,000 sq. ft. and above	1	0.05%
Total	**1841**	**99.89%**

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

RETAIL PARKS / FOODSTORES	No. of Units	Gross Area (sq. ft.)
Edge/Out of Centre		
Total Properties Surveyed:	23	464,344
Total Service / Convenience / Comparison / Vacant	23	464,344
Total Other (includes Residential Properties & Community Facilities etc.)	0	0
Total Vacant	0	0
% Vacant	0.00%	0.00%
Total Convenience	6	225,342
% Convenience	26.09%	48.53%
Total Comparison	17	238,992
% Comparison	73.91%	51.47%
Total Service	0	0
% Service		
Convenience Goods		
Bakers & Confectioners	0	0
Butchers & Poulters	0	0
Grocery	6	225,342
Off licences / Confectioners / Tobacconists / Newsagents	0	0
Total	**6**	**225,342**
Comparison Goods		
Footwear and Repair	1	10,000
Mens and Boys Wear	0	0
Womens, Girls, Children and General Wear	0	0
Furniture, carpets & textiles	6	58,017
Booksellers, arts, crafts, stationers, copy bureaux	0	0
Electrical, gas, music & photographic	2	19,999
DIY, hardware & housewares	5	125,422
China, glass, fancy & leather goods	0	0
Cars, motorcycles & motor accessories	1	10,064
Chemists, drug stores & opticians	0	0
Variety, department & catalogue	1	5,490
Florists, nurserymen & seedsmen	0	0
Toys, hobby, cycle & sports	1	10,000
Jewellers & repair	0	0
Other	0	0
Total	**17**	**238,992**
Service		
Restaurants, coffee bars, fast food & takeaways	0	0
Pub / Club	0	0
Hairdressers, beauty parlours & health centres	0	0
Laundries and Dry Cleaners	0	0
Travel Agents	0	0
Banks, Building Societies and Financial Services	0	0
Estate Agents and Valuers	0	0
Professional Services	0	0
Other	0	0
Total	**0**	**0**
Distribution of Outlets by Size		
Under 1,000 sq ft.	0	0.00%
Between 1,000 and 2,499 sq. ft.	0	0.00%
Between 2,500 and 4,999 sq. ft.	0	0.00%
Between 5,000 and 9,999 sq. ft.	7	30.43%
Between 10,000 and 14,999 sq. ft.	9	39.13%
Between 15,000 and 19,999 sq. ft.	1	4.35%
Between 20,000 and 29,999 sq ft.	1	4.35%
30,000 sq. ft. and above	5	21.74%
Total	**23**	**100.00%**

Figures do not include McArther Glen Designer Outlet Village.

BRIDGEND COUNTY BOROUGH	No. of Units	Gross Area (Sq. ft.)
Total Properties Surveyed:	1869	3,063,131
Total Service / Convenience / Comparison / Vacant	1062	2,159,044
Total Other (includes Residential Properties & Community Facilities etc.)	797	924,196
Total Vacant	170	229,960
% Vacant	9.12%	7.54%
Total Convenience	85	456,852
% Convenience	4.56%	14.98%
Total Comparison	398	846,894
% Comparison	21.34%	27.76%
Total Service	405	575,415
% Service	21.72%	18.86%
Convenience Goods		
Bakers & Confectioners	15	13,174
Butchers & Poulters	10	8,342
Grocery	43	420,214
Off licences / Confectioners / Tobacconists / Newsagents	17	15,122
Total	**85**	**456,852**
Comparison Goods		
Footwear and Repair	16	29,796
Mens and Boys Wear	4	5,598
Womens, Girls, Children and General Wear	65	111,589
Furniture, carpets & textiles	46	116,184
Booksellers, arts, crafts, stationers, copy bureaux	21	24,973
Electrical, gas, music & photographic	45	61,105
DIY, hardware & housewares	20	142,710
China, glass, fancy & leather goods	12	13,659
Cars, motorcycles & motor accessories	5	16,308
Chemists, drug stores & opticians	44	62,140
Variety, department & catalogue	20	130,802
Florists, nurserymen & seedsmen	11	7,633
Toys, hobby, cycle & sports	28	41,678
Jewellers & repair	14	12,626
Other	48	70,093
Total	**398**	**846,894**
Service		
Restaurants, coffee bars, fast food & takeaways	114	136,216
Pub / Club	42	113,408
Hairdressers, beauty parlours & health centres	66	46,206
Laundries and Dry Cleaners	5	7,417
Travel Agents	16	17,266
Banks, Building Societies and Financial Services	56	83,797
Estate Agents and Valuers	30	29,762
Professional Services	34	34,897
Other	42	106,446
Total	**405**	**575,415**
Distribution of Outlets by Size		
Under 1,000 sq ft.	1150	61.66%
Between 1,000 and 2,499 sq. ft.	503	26.97%
Between 2,500 and 4,999 sq. ft.	124	6.65%
Between 5,000 and 9,999 sq. ft.	48	2.57%
Between 10,000 and 14,999 sq. ft.	22	1.18%
Between 15,000 and 19,999 sq. ft.	7	0.38%
Between 20,000 and 29,999 sq ft.	3	0.16%
30,000 sq. ft. and above	6	0.32%
Total	**1863**	**99.89%**

Figures do not include McArther Glen Designer Outlet Village.

6.12 CONCLUSIONS

6.12.1 The results of the first annual Bridgend Retail Survey indicate that there is over 2½ million square feet of floorspace in the Established Commercial Centres of the County Borough, with just under ⅔ of that area in commercial use. Approximately 9% of the units and total floorspace is vacant, placing them below the national average. Convenience goods representation is very low (approximately 4%) indicating that the ECCs have suffered greatly from competition from the larger out-of-centre foodstores.

6.12.2 The retail parks and out-of-centre stores continue to perform very well, with a 100% occupancy rate. The survey this year does not include the ancillary uses to the retail parks, however it is envisaged that in future years it will be possible to incorporate these (drive-thru's, car garages etc.). The retail parks / foodstores account for approximately 25% of all commercial floorspace within the County Borough, which, when coupled with the fact that there is an identified need for additional 'bulk comparison goods' provision within the County Borough, will mean that these sites / developments will continue to play a strong role in the future.

6.12.3 In total Bridgend County Borough has approximately 3 million square feet of floorspace within its ECCs, Retail Parks and Foodstores (excluding McArther Glen Designer Outlet Village), which incorporates over 2 million square feet of commercial floorspace. Floorspace vacancy rates lie at 7.54% of total floorspace and 10.65% of commercial floorspace (which is comparable with the national average).

6.12.4 This first survey has given 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.