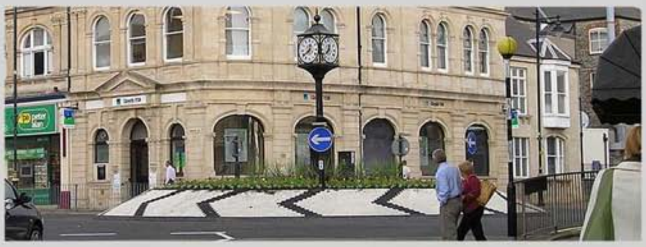
Barry
Cowbridge
Llantwit Major
Penarth

VALE of GLAMORGAN
BRO MORGANNWG

Vale of Glamorgan

Town & District Retail Centre Appraisal



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Contents

1. Introduction

1.1 In 2008 Martin Tonks of MT Town Planning was instructed by the Vale of Glamorgan Council to undertake an appraisal of the five district centres in the Vale using the TAN4 monitoring indicators of vitality and viability. The purpose of the study is to provide baseline information that will inform the emerging Local Development Plan. This includes the identification of primary, secondary and tertiary frontages in the district centres. The study also provides recommendations for the Council's town centre strategy.

1.2 This report forms my appraisal of the five centres and is structured to reflect the TAN4 monitoring indicators. The study includes an update of the Upper Holton Road District centre health check undertaken as part of the Barry Town Centre Living Study.

1.3 The health checks are based upon the following TAN4 monitoring indicators:

- turnover in relation to floorspace
- commercial yield on non-domestic property
- shopping rents
- retailer representation and change
- the diversity of uses
- accessibility
- pedestrian flow
- the proportion of vacant street level property
- customer views
- environmental quality
- perception of safety/occurrence of crime

1.4 In addition to the eleven TAN4 indicators two additional indicators from the English equivalent PPS6 have also been used to inform this study:

- the amount of edge / out-of centre retail / leisure floorspace
- potential capacity for expansion

1.5 Although there is some overlap between the TAN4 / PPS6 indicators, they help provide a context for looking at shopping centres. Unfortunately information for all indicators is not available for all the district centres and we have tried to ascertain this wherever possible from the business surveys. An example of this is the Experian Goad Maps and Centre Reports that are only available for Penarth (October 2007) and Cowbridge (June 2008) and as there is a year between these surveys the UK averages that they refer to and are referred to in the specific centre sections of this report vary slightly.

1.6 Visitor / shopper sample surveys were commissioned for the four district centres to inform the study along with 100% business surveys that overall generated response rates of c. 30%.

1.7 The TAN4 indicators have been brought together to present a picture of the vitality and viability of the district centres. The health checks identify gaps in diversity and provision in the centre such as shops that might be expected to be found here. The business and visitor surveys also provide valuable background information for the health check. In addition we have consulted local / regional agents who have advised on market issues and perceptions.

1.8 The individual health checks for the four centres are presented in the next four sections of this report. In addition postscripts to health checks for Barry Major District Centre and Upper Holton Road District Centre undertaken as part of the Barry Town Centre Living Study are presented in sections six and seven. These postscripts update the conclusions of those earlier health checks. Overall conclusions and recommendations are drawn in the final section eight.

2. Barry High Street/Broad Street District Centre

Introduction

2.1 This district centre is about a mile from the main sh opping centre in Barry focused on King Square and Holton Road. The area around High Street and Broad Street was one of the first to be built in Barry at the time the docks were developed in the nineteenth century. Today the shopping centre is focused on the parallel streets of High Street and Broad Street. High Street is narrow, traffic calmed and restricted to one-way traffic whereas Broad Street is broad, like its name, and forms the main road to the resort of Barry Island and is an important public transport corridor served by regular buses and is also the location of the Barry Town railway station.

2.2 In many respects the centre appears to operate as an annexe to the main town centre. With the exception of the (recently closed) cinema and theatre, Barry High Street / Broad Street provides the main evening economy activities in the town in the form of café bars, restaurants and night clubs. The centre is also home to most of the property / estate agents and business services present in the town. The nearby Barry Town railway station provided direct access to High Street / Broad Street, whereas the main town centre is not directly linked to the nearby Barry Dock Station.

2.3 However, the retail offer is somewhat limited, although very specialist, in Barry High Street / Broad Street District Centre. There are very few national multiples, only one high street bank (Barclays). There are several quality independent shops in the centre particularly retailing ladies clothes, outfits and accessories. There are also specialist shops serving the home improvement and furnishings market.

2.4 The shopper survey indicates that most visitors to High Street / Broad Street come from the immediate locality i.e. the western side of Barry, however, a fair percentage were also attracted from elsewhere in Barry (see Map 1 Appendix 1) presumably attracted by the specialist retailers and services not available elsewhere in the town.

Turnover in Relation to Floorspace

2.5 TAN4 advises turnover figures vary greatly and can be of assistance as an indication of the relative activity of different shopping areas and centres. Unfortunately there is no published information for High Street / Broad Street and it is not possible to estimate due to the limited survey evidence. The business surveys for the District Centre indicated that overall more businesses had increased turnover (37%) in the last five years than decreased (28%) with 34% remaining static. This overall increase in turnover is reflected in the quality retail offer in the centre, the generally high standard of the frontages /

fascias and the physical fabric of many of the business premises.

2.6 The business survey also recorded reasonable optimism about future turnover levels with 38% expecting an increase and 38% static turnover. Only 24% expected turnover to fall compared to the 28% who reported a fall in the last five years. Conversely the business survey recorded a slight decrease in employment levels over the last two years with more businesses with decreasing workforces (28%) than increasing (17%) but the majority (55%) had remained static. Overall these business performance indicators suggest confidence is quite good and even improving despite the current downturn in the economy.

Commercial Yield on Non-domestic Property

2.7 The commercial yield on a property investment represents the return to the investor for risk

taking. It is calculated by dividing the rental value of a property by the capital value at the time of purchase and expressing as a percentage. The lower the percentage yield the longer an investor is prepared to wait for a return indicating confidence in the centre.

2.8 Yields are not published for High Street / Broad Street District Centre due to the nature of the shopping centre and the limited number of transactions. Consultations with local agents indicated that they expected yields to be relatively low for the district centre reflecting reasonable business confidence in the centre.

Shopping Rents

2.9 Again rental information is not available for High Street / Broad Street due to the small size of the centre and the limited number of transactions. The business survey for the district centre indicated that respondents were split evenly between those who rented / leased their premises (50%) and those who owned them (50%). Such high levels of owner occupation are unusual for district centres and local agents indicate that those that are rented are often on a 'per unit basis' rather than floorspace area and many included flats above. As a result of the above average owner occupancy levels for a commercial centre there are fewer properties to rent. Demand for such properties is reported to be high due to the popularity of the centre with independent businesses and shoppers alike and as a result they command higher rental levels that compare favourably with the main Barry town centre where most of the town’s multiples are located.

Retailer Representation and Change

2.10 Successful centres also have a good range of shops including specialist independents and national multiples. There is no Experian Goad Centre Report for the High Street / Broad Street District Centre, however, the Council’s survey indicates there are c. 170 businesses in and around the centre of which only 4 are part of national / regional chains. As well as the Premier convenience shop (part of a national buying group owned by cash &

carry company Booker), there is a Ladbrookes (bookmakers), Barclays Bank and Anuerin Evan's Chemist is part of the Numark Pharmacy.

2.11 Several of the independent retailers / businesses can be described as quality independents. In the business survey several independents were named as key attractions including Food for Thought Delicatessen (7.4%), Jacquie's Green Grocer Store (4.9%), The Best One Convenience Store (4.3%), Broad Street Garden Centre (4.3%), Premier Convenience Store (4%), Bryl's Boutique (4%) and Vanilla Delicatessen (2.8%). However, in the visitor survey many respondents listed shops in the main centre in Barry as their favourite shops suggesting High Street / Broad Street is viewed as an annexe of the main town centre focused a mile away on Holton Road / King Square.

2.12 The visitor survey recorded above average levels of satisfaction with the choice of food shops and supermarkets in High Street / Broad Street (130 on a 100 average index) and slightly lower satisfaction with the clothes and non-food offer (117). However, there was still high levels of 'leakage' for main-food shopping (93%) mainly to the Waterfront Morrisons (60%), Barry Tesco (18%), Ferry Road Asda (Cardiff) (8%) and Barry town centre (6%). There were lower 'leakage' levels for non-food with 37% of visitors stating this was their first choice destination. Of those travelled elsewhere the most common destinations were Barry town centre (68%) and Cardiff city centre (29%).

2.13 In terms of missing shops from the district centre the most common response in the visitor survey was the need for more branded clothes shops such as Primark (13%), Top Shop (10%), Evans (10%), M&S (5%) and Clarkes (5%). However, these shops are not even represented in nearby Barry town centre so are unlikely to locate in the smaller district centre. 10% of respondents also wanted a small supermarket in the centre which is perhaps more realistic although there are no apparent sites.

2.14 Amongst the business community the Post Office was regarded as the most important shop (10.2%), this may reflect the current closure programme and the importance of the PO to the business community. The pharmacies / chemists (7.7%) were the next most important shops followed closely by Food for Thought Deli (7.4%). Other important attractions in the centre according to business survey respondents included the Doctor's surgery (6.5%), the cafes and restaurants (6.2%) and Barclays Bank (5.8%).

2.15 The business survey also asked about investment plans. Around two thirds of respondents answered this question. All planned to remain in their premises for at least the next year but 22% would commit no further. 42% expected to remain in their premises for at least the next five years and 36% for as long as the business lasted. In terms of problems within the centre (Q19), lack of room / premises to expand into was the second highest complaint.

2.16 The Focus database does not have any registered requirements for this district centre and have very few (2) for the main centre of Barry. Local agents report that the limited demand for units in the district centre is from local businesses.

Diversity of Uses

2.17 Successful centres are diverse centres that perform a variety of roles to attract a wide range of visitors and shoppers at all times of the day. TAN4 identifies the importance of diversity to the success of a centre. As there is no Goad Centre Report for the High Street / Broad Street district centre we are reliant upon the Council survey. This indicates that 29% of business units are occupied by shops 24% by comparison (non-food shops) and 5% by convenience shops. The actual percentage of floorspace given

over to convenience goods will be much slightly higher as the convenience stores tend to be larger than the comparison shops and service uses in the district centre.

2.18 These 71% of the business units occupied by non retail / service uses include:

- 22 retail service uses such as hairdressers / barbers, bookmakers, therapeutic services, tanning centres, tattoo parlours, etc.;
- 25 professional and financial services offices such as the estate agents, letting agents, bank, solicitors and accountants;
- 15 takeaways;
- 11 cafes / restaurants;
- 3 medical centres / clinics; and,
- 21 vacancies.

2.19 In addition there are several community buildings, a primary school and places of worship in and around the centre. The town's main hotel The Mount Sorrell (Best Western Group) is also located close to the centre. The centre is tightly surrounded by residential uses on all sides except to the south where the railway line to Barry Island / Bridgend forms an equally tight boundary preventing expansion.

2.20 The level of convenience provision in terms of the number of units (5.4%) is well below the Goad UK average of 10.6% and for a smaller shopping centre serving the day to day needs of local residents it might be expected that the level of convenience provision was higher. In comparison to the Goad UK average (52.6% excluding vacancies) the comparison sector (24%) is also under represented which is to be expected in a small centre.

2.21 Conversely the service sector (71%) is over represented in comparison to the Goad UK average (37.1%). In particular retail service uses (13%) and professional and financial services (15%) are over-represented. (The retail service uses include a disproportionate number of hairdressers and barbers.) The number of cafes / restaurants, bars and clubs, and takeaways is also disproportionate reflecting the district centre's role as the main evening economy destination in Barry.

2.22 In the visitor survey the most common response to missing leisure facilities was a cinema (67%) followed by a theatre (13%)

and a bowling alley (13%). The main cinema in Barry has recently closed but if a new cinema was attracted to the town it is unlikely to find a site in this part of Barry even if the operators wished to be close to the other main evening economy activities. There is already a theatre in Barry at the Memorial Hall and therefore the prospects of a second theatre locating in the town are remote. Consequently, these survey results may reflect the perceived gaps in leisure services provision in the wider Barry urban area.

2.23 Overall the centre displays good indicators of diversity for a small shopping centre. The retail offer is particularly specialist with several quality independent ladies clothes / fashion shops, several home improvement and furnishings stores, two delicatessens, a butcher and a green grocer. Although the centre lacks the multiple offer of Barry town centre the specialist independents more than compensate for this and give the centre a strong offer and sense of place. Professional and financial services are particularly well represented and most of the town's estate and commercial property agencies are located on the High Street. There are also a number of bars, restaurants and cafes on High Street but Broad Street is more the focus for the evening economy uses. There are no major gaps in local provision with the possible exception of a small supermarket and overall the district centre displays good diversity and performs well on this indicator.

Accessibility

2.24 High Street / Broad Street has good walk-in access from the surrounding residential areas although there is quite an incline to the north which may discourage walking and cycling to the centre from this direction. Orientation in the centre is easy as it is focused on two parallel streets and the adjoining roads. In the visitor survey respondents gave the ease of walking around the centre the highest ranking (181 on a 100 Average Index where 200 is the maximum) of any aspect of the centre.

2.25 The district centre has the benefit of its own railway station on Broad Street unlike the main town centre which is some distance from the (smaller) Barry Docks station, Broad Street is also a main bus corridor with frequent service to Barry town centre and beyond. In the visitor survey bus access to the centre was regarded as good (164 on a 100 Average Index) as were train services / frequencies (152). However, in the business survey bus services were regarded as the main problem with the centre which contradicts the visitor survey.

2.26 There was common agreement amongst businesses and visitors that parking was inadequate. In the business survey this was ranked as the highest priority for investment and in the visitor survey it scored (85) below average although ease of vehicular access scored much higher (175) and most respondents had travelled by car (50% followed by walking (37% and bus 11%). At the moment parking is time restricted to two hours on the High Street and is free. However, at busy times the on-street parking on the High Street can be difficult and its provision along either side of the narrow one-way (west to east) road plus the traffic calming can lead to congestion. Parking problems are exacerbated at times by deliveries and in consultation with the business community the Council may have to consider restricting delivery times.

2.27 Overall access to the High Street / Broad Street is quite good by most modes with the possible exception of buses, in the eyes of the business community, but there is clearly a parking problem in the centre at peak shopping hours.

Pedestrian Flow

2.28 There are no published pedestrian flow surveys for this centre. Our own observations indicate that the central parades on High Street around the Post Office have the busiest footfall but that it reduces considerably towards either end of the main parades. The flows on Broad Street are much lower as there are fewer shops here although the Barclays Bank and railway station both generate a degree of footfall and this is also the main bus corridor. In the evening Broad Street is busier than High Street as this is where most of the bars are located although there are a number of restaurants and takeaways on the latter which also attract people into the area. The two convenience stores (Premier and Best One) both remain open late and there is also a free cashpoint outside the Post Office that attracts footfall.

2.29 The main pedestrian circuits are along the central part of High Street and between here and Broad Street. Because there is no main car park, pedestrian circuits probably vary depending upon where car borne visitors manage to park either on High Street or adjacent side roads. Broad Street has the advantage of attracting passing traffic whereas one-way High Street is traffic calmed and must rely more upon destination shopping. In the evening Broad Street is the main promenade for young people visiting the bars and clubs. Overall footfall is very high in the district centre and the centre performs well on this TAN 4 indicator.

The Proportion of Vacant Street Level Property

2.30 Twenty one (12.5%) of the 168 retail / business premises in High Street / Broad Street district centre are vacant. This is above the Goad UK average of 8.9%. Successful centres have a turnover of vacant property and most of the vacancies in the central part of High Street / Broad Street appear to be short term. However, on the eastern periphery of High Street there are several longer term vacancies and there have also been some conversions to residential use here. Despite the above national average vacancy rate, overall the centre performs reasonably well on this TAN4 indicator.

Customer Views

2.31 Business survey questionnaires were completed by 37 (22%) of the 168 businesses in the district centre. In addition a visitor survey was undertaken by Pengwyn Market Research with a sample of 54 respondents.

2.32 Retail businesses were slightly over-represented amongst respondents to the business survey – 31% of respondents compared to 29% of businesses in the centre recorded in the Council's own occupier survey. The majority of respondents were fairly well established businesses – 62% over five years. In terms of why businesses were located in the district centre (Q8) most were for commercial reasons – the market, good accessibility, high footfall, proximity of other businesses, etc. The availability of short term leases and free parking were the least important locational factors. Together the responding businesses employed c. 192 people of whom around 92 worked full time.

2.33 In terms of positive aspects of High Street / Broad Street as a location responses to Q17 indicated that accessibility, the varied shopping offer and the local market for quality goods / services were the main benefits. Negative aspects of the district centre as a location (Q18) indicated the bus services and lack of room to expand were the main concerns. Other concerns included the cost of rents (3rd), personal safety & security problems (joint 4th), the condition of premises (joint 4th), low footfall (6th), unattractive environment (joint 7th) and lack of investment (7th). Only half the respondents rented their premises indicating rents must be fairly high for this to be such a high overall concern. The concerns about footfall, environment and investment must also be in specific areas of the centre as generally these are all positive aspects and there is quite a lot of evidence of recent investment in several projects / sectors in the centre.

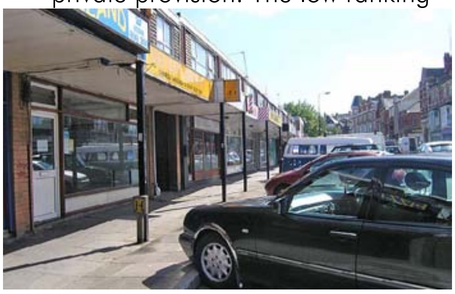
2.34 In response to Q19 on what improvements to the centre businesses would like to see improved car parking was ranked highest followed by financial help for improvements to commercial buildings, environmental improvements and increased range / choice of shops. Other areas for improvement included reduced property costs (joint 5th), increased police presence (joint 5th), more public toilets (joint 7th) and town centre wardens (joint 7th).

2.35 The visitor survey recorded that most respondents were frequent visitors (72% at least weekly) although there was also a significant group of less regular visitors (28% monthly or less often) presumably attracted by the quality independents / specialist services in the centre. Visitors did not stay long in the centre with 83% spending two hours or less here. Despite the easy walk-in access 50% arrived by car and 35% walked to the centre. The most common reason for visiting was non-food shopping (mentioned by 44% of visitors in a multiple response Q5) followed jointly by food shopping (20%) or the bank (20%). Other common reasons given for visiting included eating out

(13%), meeting friends / relatives (11%), browsing / window shopping (9%), and work (9%).

2.36 In addition to the aforementioned positive satisfaction levels with the accessibility (excluding parking) and food / non-food provision, other positive aspects rated by visitors included the range of banks and financial services (146 on a 100 average index), the variety of places to eat and drink (128), the overall attractiveness of the centre (120) and the general cleanliness / maintenance of the centre (137).

2.37 Less positive aspects included the availability of car parking spaces (85) availability / cleanliness of toilets (48), and the choice of leisure facilities (29). The lack of public toilets was also a concern for businesses in their survey and perhaps reflects the evening economy uses in the area which require such facilities in addition to private provision. The low ranking



for leisure facilities may reflect the recent closure of the cinema in nearby Barry town centre.

2.38 Overall the business and visitor surveys recorded generally positive views of the centre. High Street / Broad Street is clearly an attractive place to visit and shop in as reflected in its role as a specialist retail quarter as well as centre of the evening economy activities in the town. There are many positive aspects to the centre recognised by businesses and visitors alike such as the accessibility and choice / quality of shops. On balance, the centre performs well on this TAN4 indicator.

Environmental Quality

2.39 The district centre presents an attractive High Street shopping environment and in particular the High Street itself. Broad Street is less attractive but still has some attractive buildings and fascias and occasional views out towards the docks and Barry Island. The best approach to the centre is from the railway station where the former Barry Hotel, the finest building in the centre at the junction of Broad Street and Windsor Road has been recently renovated and converted to apartments.

2.40 There are no other outstanding or landmark buildings in the district centre but the mixture of red brick and grey stone buildings fronting onto High Street add to the character of the centre. In addition many of the shops have gabled eaves fronting onto the High Street similar to Barry town centre and this adds to the distinctiveness of the centre and sense of place. Orientation within the centre is relatively easy due to the linear / grid iron street patterns.

2.41 One of the complaints with the centre in the business survey was the poor quality maintenance of some buildings, however; generally this is of a very good standard although there are a few properties at the eastern end of the High Street and one demolition site that are in need of investment. Fascias are mostly in keeping and scale with the buildings above although there are a few garish takeaways on Broad Street. Fortunately most shops are not shuttered therefore even when closed they don't detract from the streetscene. The least attractive frontage is the sixties Broad Parade on the south side of Broad Street. However, these units are at least functional providing some

large floorplates than available in the older part of the centre.

2.42 Overall the district centre is a very attractive shopping centre and evening economy destination with well maintained buildings and attractive fascias and generally the centre performs well on this TAN4 indicator.

Perception of Safety and Crime

2.43 The business interviews recorded some concerns about crime and personal safety amongst respondents and this was ranked as the fourth highest problem with the centre after bus services, the lack of room to expand and the cost of rents. However, vandalism and graffiti that are often associated with high crime areas was given the lowest ranking of all problems in the centre by businesses. The concerns about crime were reflected in the priorities for investment with a greater police presence joint 5th (behind improved car parking charges and environmental improvements), town centre wardens was joint 7th and more CCTV coverage joint 9th.

2.44 There didn't appear to be a great deal of support for this concern anywhere else in the business survey and the visitor survey recorded quite high levels of satisfaction with this aspect of the town centre. The visitor survey recorded all (100%) of respondents felt safe during the daytime. Half (50%) of respondents also visited the town centre at night – mainly to go the pubs (52%), takeaways (41%), dining out at restaurants (33%) and / or late night shopping (22%). Of those who didn't visit at night only 15% gave the main reason as feeling unsafe in the centre. Of those who did visit the centre at night 80% felt safe and 11% didn't.

2.45 It could be that the concerns about crime and personal safety recorded in the business survey are a response to the everyday security problems that town centre businesses everywhere report. There is very little concern about the safety of the centre at night although businesses were divided as to whether the new Wetherspoon's pub would be of benefit to the centre. The town therefore appears to have a slight safety and personal security problem perceived or real amongst the business community but overall performs reasonably well on this TAN4 indicator.

The Amount of Edge / Out-of Centre Retail / Leisure Floorspace

2.46 There are no edge or out-of-centre retail / leisure facilities in the High Street / Broad Street however, the town centre does extend towards the railway station and the garden centre, car showroom and motor parts shop located there are not included in the Council's district centre survey. To the east the High Street merges into residential areas and surplus retail units have been converted back to residential use.

2.47 The main competition for Broad Street locally is from Barry town centre one mile to the east and also the Waterfront Retail Park and in particular the Morrisons superstore located there. The business survey recorded the Morrisons superstore as being regarded as the main competing destinations by more respondents (13.8%) than any other centre. The out-of-centre Barry Tesco store was joint 4th (8.8%) after Barry town centre (12.5%) and Culverhouse Cross (12.5%). The problem with the superstores is that they not only sell convenience goods but also extensive ranges of town centre and bulky comparison goods. They therefore compete with most stores in district centre and due to their massive buying power and out-of-centre locations have many trading advantages over the smaller town centre stores (e.g. free surface car parking). The visitor survey confirmed that these two stores are the main-food destinations for many local residents (78%) and only 6% used the centre itself.

2.48 With regard to non-food the visitor survey recorded a much higher retention level with 37% of respondents advising the district centre was their main non-food destination. Of those who went elsewhere the nearby Barry town centre was the most frequent destination (68%) followed by Cardiff city centre (29%). Very few people referred to the out-of-centre Culverhouse Cross that was the joint second main competing centre in the business survey or Cardiff retail parks that were fourth suggesting these might be secondary destinations.

2.49 Clearly the district centre is losing considerable convenience goods and non-food expenditure to competing centres but most of this is spent elsewhere in Barry. Whilst the retention rate for convenience goods seems particularly low the centre will probably benefit from considerable top-up spending at the specialist stores there. The comparison goods market share is very high for a centre with very few national multiples and is an indicator of the strength of the quality independent offer in the centre. Overall the centre performs reasonably well on this TAN4 indicator due to this specialist independent offer.

Potential Capacity for Expansion

2.50 The business survey recorded lack of room to expand as the second main problem with the town centre after the bus services (Q18). The surrounding residential areas are built right up to the district centre boundaries in all directions, except to the south where the railway line forms a tight boundary, and there are only a few small infill sites in the centre. The main problem is probably for businesses seeking larger premises and some have combined with adjacent units to achieve this but this isn't always possible. The lack of larger units is probably the main reason that more national multiples have not moved into the centre to complement the excellent independent offer. The lack of room to expand means the centre does not perform well on this (PPS6) indicator of vitality and viability. The 2008 Vale of Glamorgan Retail Planning Study produced by CACI does not consider the district centre as a separate destination from the main town centre and has no recommendations for capacity or new retail provision in the centre to meet it.

Summary of Vitality and Viability

2.51 There is a good range of independent shops and town centre uses in High Street / Broad Street district centre the only possible gap being a small supermarket to help retain more main-food expenditure locally. Diversity is quite good and the centre performs the role of the main evening economy destination in the town. The range of specialist convenience and non-food stores is very good for a small centre and overall the centre displays good indicators of diversity.

2.52 There is evidence of recent investment in the shopping centre but a few premises are poorly maintained and parts of Broad Street and the eastern end of the High Street are beginning to look tired and in need of environmental improvements. The potential capacity for growth is present as reported by businesses finding it difficult to expand but the proximity of Barry town centre and Waterfront retail park will probably restrict demand to 'more of the same'. The town centre does merge into the surrounding residential areas and there is a case for consolidation around a retail core on High Street.

2.53 The shopping centre environmental quality is very good particularly in the central frontages on High Street and the western end of Broad Street. Vacancy levels are slightly higher than the national average but are being reduced by conversions to residential use. Very few of the shops and takeaways have shuttered windows, although some of the latter have garish fascias unsympathetic to the quality of the building facades above, and there is little evidence of graffiti and vandalism in the centre.

2.54 Accessibility is very good for residents of the surrounding residential areas although there are clearly parking problems at peak hours. The centre also benefits from the proximity of the main train station and Broad Street is an important bus route, although despite this businesses do complain about services to the centre.

2.55 The business survey indicates generally high satisfaction levels with the shopping centre. The main concern appears to be with the cost of rents and maintaining business premises in the area. Most businesses are improving turnover despite the centre losing considerable convenience goods trade to nearby Barry and out-of-centre superstores. Customers are generally happy with the district centre offer but would prefer a wider choice of food shops and multiple fashion retailers in particular although the latter may be a Barry issue not just restricted to the district centre.

2.56 In summary, the High Street / Broad Street district centre generally presents good TAN4 indicators of vitality and viability and compares favourably with other district centres in the Vale but struggles to compete with nearby Barry and out-of-centre destinations for main-food shopping. The main strengths are the environmental quality, and accessibility, the quality independents and good range of services. The main weakness is the limited car parking and the lack of space / properties to expand into as well as high rents and property maintenance costs. The main opportunities are the expansion of the evening economy, maintaining the quality independent retail offer and ensuring there isn't any conflict between the two. The main threats are the continued expansion of out-of-centre retailing around competing centres, conflict between the daytime and evening economy uses and the introduction of car parking charges.

SWOT Analysis Strengths

- The attractive high street shopping environment
- Good accessibility by foot, car and train
- The quality independents and

good range of services drawing visitors from a wide area and adding to diversity
- Evening economy activities
- Safe environment
- Good choice of pubs, cafes, restaurants and takeaways that will attract passing and dedicated trade in the evening

Weaknesses

- The limited on-street car parking
- Lack of space / properties to expand into
- High rents and property maintenance costs
- Proximity of competing centres including extensive out-of-centre destinations.
- Limited supermarket provision
- Lack of public toilets
- Above average vacancy rate
- Some poor quality takeaway fascias

Opportunities

- Expansion of the evening economy
- Maintaining / enhancing the quality independent retail offer
- Managing conflict between the evening and daytime uses
- Environmental Improvements
- Barry Docks Regeneration

Threats

- Expansion of Barry town centre and out-of-centre destinations
- Introduction of parking charges
- Loss of key / specialist retailers from the town centre

Recommendations

2.57 The centre should retain its district centre designation.

2.58 The section of the High Street between Island Road and Market Street should be designated as the main primary frontages in the centre as shown on Map 5. In these frontages non retail uses should be discouraged and no two non-retail uses should be permitted together to ensure the street remains vibrant during the daytime and to discourage 'dead frontages.'

2.59 The frontages on Broad Street and connecting roads to the High Street along Island Road and Height Street should also be designated as secondary frontages where non-retail uses will be permitted.

This will enable the area to develop its evening economy offer. Some shops are likely to remain in the area benefitting from passing trade on this main road whereas shops on High Street need to

generate their own footfall (as there is much less passing trade) hence the need for primary frontage designation in that area to discourage dead frontages (that don't generate daytime footfall).

2.60 The Council should continue to develop its shop frontage policies to ensure inappropriate fascias that detract from the buildings above are discouraged throughout the district centre.

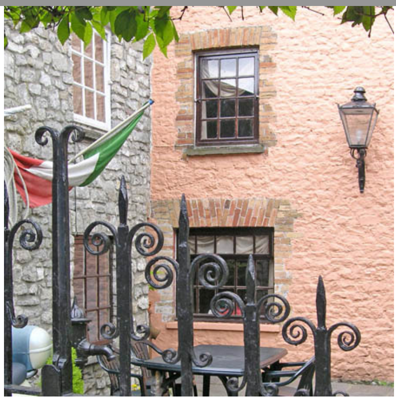
2.61 Any future hot food takeaways that are permitted should be conditioned to ensure their shutters are opened during main daytime shopping hours and / or that they are open weave style shutters.

2.62 In consultation with the business community the Council should explore the possibility of reducing parking times in some parts of the district centre such as the primary frontages to allow more passing trade to make short stops. Elsewhere in the centre in more peripheral areas the Council might consider increasing waiting times for visitors spending longer and also for staff working in the centre. The Council also need to consider, in consultation with the business community, restricting delivery times although this will only be a consideration at peak shopping hours.

2.63 The Council should investigate the provision of public toilet facilities in the district centre. They might also consider temporary facilities to cater for the evening economy users at peak times.

2.64 The Council needs to review its management of the evening economy to ensure it doesn't impinge on the attractiveness of the centre as a daytime shopping centre, for example, by ensuring early morning street cleaning after weekend evenings.

3. Cowbridge District Centre



Introduction

3.1 This district centre is around twelve miles northwest of Barry, five miles north of Llantwit Major and seven miles east of Bridgend. The centre serves the surrounding rural population in this part of the Vale of Glamorgan. The town has adopted the role of a dormitory village for commuters to Cardiff and Bridgend.

3.2 The centre is located on the A48 that was the main route from Cardiff to Bridgend, Swansea and west Wales prior to the opening of the M4. Not only is the town bypassed by the M4 the A48 also bypasses Cowbridge to the benefit of the High Street shopping environment. The historic town owes its location as a bridging point over the River Thaw. In the medieval period it developed as a market town and became a fashionable residence in the nineteenth century. The street pattern still reflects that of the medieval town but most of the buildings fronting onto the high street date from the regency period or later.

3.3 The centre is focused on the High Street that runs east to west and is home to most of the main shops in the centre – national multiples and independents alike. Just off the High Street there are a number of small yards such as Verity's Court and Coopers Lane. Next to the bridge / river there is the small covered Willow Walk / Penny Lane mall that adds to the visitor experience and shopping offer. There is also the small Town Hall Square behind the attractive former Town Hall building which is used as a bus station and nearby is the main car park for the centre. To the south of the High Street is a small garden centre and nearby are the 'Physic Gardens' which is one of the main visitor attractions in the town.

3.4 Cowbridge continues its historical role as a service centre for the surrounding rural area and has a good range of shops and banks. There are a few national multiples including Tesco Express, Filco Supermarket, Spar, Martins Newsagent and Lloyds Pharmacy and all the main high street banks are represented. In addition it has supporting professional services, numerous quality independent stores and tourist / craft shops.

3.5 The shopper survey indicates that visitors to Cowbridge come from all over the Vale and beyond and not just the town itself as shown in Map 2 (Appendix 1).

Turnover in Relation to Floorspace

3.6 TAN4 advises turnover figures vary greatly and can be of assistance as an indication of the relative activity of different shopping areas and centres. Unfortunately there is no published information for Cowbridge District Centre and it is not possible to estimate due to the limited survey evidence. The business surveys for the District Centre indicated that turnover fortunes were mixed but the majority (52%) reported an increase over the last two years, 36% reported a decrease and 12% stated they had remained static.

3.7 The business survey recorded a degree of pessimism about future

turnover levels with 37% expecting a decrease, 39% static turnover and only 25% expected turnover to rise compared to the 52% who reported an increase in the last five years. The business survey also recorded a decrease in employment levels over the last two years with more businesses with decreasing workforces (26%) than increasing (20%) but the majority (55%) had remained static. Overall these business performance indicators suggest confidence is declining which may reflect the national economy as much as local performance.

Commercial Yield on Non-domestic Property

3.8 The commercial yield on a property investment represents the return to the investor for risk taking. It is calculated by dividing the capital value of a property by the rent at the time of purchase. The lower the yield the longer an investor is prepared to wait for a return indicating confidence in the centre.

3.9 Again yields are not published for Cowbridge District Centre due to the nature of the shopping centre and the limited number of transactions. Consultations with local agents confirmed that the centre is a popular business location but that the limited yield information is not a reliable indicator of this.

Shopping Rents

3.10 Rental information is not available for Cowbridge District Centre Values due to the limited number of transactions. The business survey for Cowbridge District Centre indicated that 86% of premises were rented. The availability of short term leases and affordable rents were the two most common reasons given for locating in Cowbridge by respondents. In addition affordable rents was ranked the 5th most positive aspect of the centre as a business location. Conversely the cost of rents was ranked as the 3rd biggest problem with the centre (after parking and traffic congestion) again perhaps reflecting mixed fortunes amongst businesses in the centre. However, reduced property costs was only ranked 10th in the list of priorities for investment in the centre suggesting high rents is only an issue for a minority of businesses.

Retailer Representation and Change

3.11 Successful centres also have a good range of shops including specialist independents and national multiples. The Experian Goad Centre Report for the Cowbridge indicated that 11% of business premises were given over to convenience shops, 46% to comparison goods, 15% to retail services, 9% to banks and financial services and 15% to leisure services (bars, cafes, restaurants and pubs).

3.12 The convenience sector (11%) is over-represented compared to national town centre averages (8%) which are typical for smaller centres and there are a number of specialist food retailers although no fishmonger. The comparison sector (46%)

is also over-represented compared to national town centre averages (31%) which is unusual for smaller centres and reflects the quality offer and specialist ladies clothing and craft shops that draw visitors from a wider area.

3.13 The business survey recorded the majority of respondents (55%) were long established businesses (over ten years) although 4 businesses (7.5%) were less than one year old. The majority of businesses expected to remain in their premises for more than one year and a third for at least five years. The number of new businesses and few vacancies suggests the centre is a popular business location and there is demand for any premises that are vacated.

3.14 Several of the independent retailers / businesses can be described as quality independents. In the business survey several independents were named as key

attractions including Arthur John & Co. hardware (6.3%), Etcetera ladies clothing (3.4%) and Jon Dan Jewellers (2.1%). However, it was the overall offer that was seen as the main attraction such as the high street shopping environment (8.7%), the bars and pubs (7.4%), the ladies clothes shops (7.2%), the banks (5.7%) and even the estate agents (4.4%) rather than individual shops or businesses. Arthur John & Co. hardware was also the favourite shop in the visitor survey mentioned by 19% of respondents followed by Filco (14%), the delicatessen (7%), Coyote Ski Shop (7%), Butterbean (children's shop) (7%) and Goose Island 7%.

3.15 The visitor survey recorded above average levels of satisfaction with the choice of food shops and supermarkets in Cowbridge (169 on a 100 average index) and also with the clothes and non-food offer (156). However, there was still high levels of 'leakage' for main-food shopping (84%) to a variety of destinations with Bridgend Tesco Extra being the most popular (28%) followed by Culverhouse Cross Tesco (17%) and Barry Morrisons (7%). There were lower 'leakage' levels for non-food with 30% of visitors stating this was their first choice destination. Of those travelling elsewhere the most common destinations were Cardiff city centre (47%), Barry town centre (16%), Culverhouse Cross (16%) and Bridgend (11%).

3.16 In terms of missing shops from the district centre the most common response in the visitor survey was the need for more clothes shops of one type or another and 11% of respondents specifically mentioned a Waitrose supermarket. However, 47% of visitors couldn't think of a type of shop or missing retailer they would like to see reflecting the generally high satisfaction levels with the retail offer in Cowbridge.

3.17 Focus record four retail requirements for Cowbridge including Greggs Bakers, Dollond & Aitchison opticians, The Original Factory Outlet Store and Orvis, an upmarket American chain that specialises in outdoor wear and has a growing number of stores in the UK in rural centres and outlet centres. Local

Agents were unable to confirm any additional national interest but advised there was quite strong local interest in the town centre.

Diversity of Uses

3.18 Successful centres are diverse centres that perform a variety of roles to attract a wide range of visitors and shoppers at all times of the day. TAN4 identifies the importance of diversity to the success of a centre. The Goad Centre Report for Cowbridge indicated that leisure services (bars, cafes, restaurants and pubs) were under represented (15%) in terms of unit numbers relative to the UK average (19%), however, in terms of floorspace taken up (20%) they are actually over-represented (UK 18%). This indicates leisure services in Cowbridge occupy above average floorspaces suggesting successful businesses within this sector. The business survey recorded the cafes and restaurants in the town being regarded as the biggest attraction.

3.19 In addition to the quality retail offer the centre also has a good financial services offer, although at 9% of units this is below the national average (10%) but in terms of the floorspace taken up the centre (9%) is above the national average (7%) indicating branches in Cowbridge occupy above average size units.

3.20 Other uses that are under-represented in the town centre according to Goad are public services, religious buildings (mainly off the high street that the Goad survey is restricted to) and health services. The number of vacant units (3%) was also well below the national average.

3.21 There are a number of visitor and tourist attractions close to the centre including the Physic Gardens, the medieval town wall and the Holy Cross church. However, the main attraction of the centre is its quality offer and pleasant high street shopping environment. In the visitor survey the most common response to missing leisure facilities was a swimming pool (75%) followed by a cinema (18%) although 56% of respondents couldn't think of any missing facilities. Overall the town centre has good diversity for a smaller centre and performs very well on this TAN 4 indicator.

Accessibility

3.22 Cowbridge has good walk in access from surrounding residential areas although there is quite a hill to the east which must discourage walking and cycling to the centre from this direction. Orientation in the centre is easy due to the linear nature of the High Street. In the visitor survey respondents gave the ease of walking around the centre the third highest ranking (177 on a 100 Average Index where 200 is the maximum) of positive aspects of the centre (after variety of places to eat and drink and choice of banks).

3.23 The town centre has no rail connection but the centre is regarded as being well served by buses by visitors and was ranked above average by (133 on a 100 Average Index). Bus access was not regarded as a problem by the business community either who ranked it quite low in terms of problematic issues in the shopping centre.

3.24 Both the business and visitor surveys found that car parking in Cowbridge was a problem. The business survey ranked parking and congestion as the main problems in Cowbridge. The visitor survey recorded the availability of parking spaces as being a problem (52 on a 100 Average Index) but not car access (147). However, the solution to this was not regarded as introducing car parking charges but improving provision by other means was seen as the main priority for investment.

3.25 Overall access to the Cowbridge is quite good by all available modes but there is clearly a parking problem in this historic town. There are only two small car parks in the town centre and the on-street parking is time restricted. As a result of the poor parking provision the centre doesn't perform that well on this TAN4 indicator.

Pedestrian Flow

3.26 The Council have some limited indicate the busiest area of the town is the High Street between the Town Hall and junction of Church Street and this forms the primary shopping frontages for the centre. Immediately to the east of the bridge the frontages become sporadic with only a few specialist shops and services. To the west of Church Street the frontages also peter out with more dead frontages in retail terms such as banks, offices and hotels.

3.27 The Filco supermarket is probably the main generator of footfall in the centre but it is the overall offer that appears to attract high visitor levels from across the Vale and beyond. There are no obvious pedestrian circuits due to the linear nature of the town although the main car park and bus station behind the town hall are the starting point for many visits. There are strategic pedestrian crossings at two points along the high road that assist pedestrian circulation. Overall footfall is very high in the Cowbridge and the centre performs well on this TAN 4 indicator.

The Proportion of Vacant Street Level Property

3.28 Three (3%) of the 102 retail / business premises in the Cowbridge are vacant according to the Goad category report for the centre. This is below the Goad UK average of 8.9%. However, the Goad plan for the centre ends just after the bridge and there are a few additional vacancies in the occasional commercial premises at the eastern end of the town centre. The Council's own floorspace survey that covers a wider area than the Goad Plan / Survey recorded 9 vacancies out of c. 182 business properties, a vacancy rate of 5% still well below the national average. Most of the vacancies in Cowbridge are in peripheral areas and appear to be short term and there are no prominent long term vacancies. Overall the centre performs very well on this TAN4 indicator.

Customer Views

3.29 Business survey questionnaires were completed by 53 (29%) of the 182 businesses in Cowbridge town centre. In addition a visitor survey was undertaken by Pengwyn Market Research with a sample of 65 respondents.

3.30 Retail businesses were slightly under-represented amongst

respondents to the business survey – 49% of respondents compared to 59% of businesses in the centre recorded in the Experian Goad category report. The majority of respondents were long established businesses – 55% over ten years and a further 13% over five years. In terms of why businesses were located in Cowbridge town centre (Q8) most were for commercial reasons – the availability of short leases and cheap rents, proximity of other businesses, high footfall, etc. as well as the good accessibility. Together the responding businesses employed c. 370 people of whom around 188 worked full time.

3.31 In terms of positive aspects of Cowbridge as a location responses to Q17 indicated the availability of affordable premises for expansion was the most important reason followed by availability of workforce and accessibility of the centre by bus and car. Negative aspects of Cowbridge as a business location (Q18) indicated the car parking was the main concern followed by congestion, cost of rents and low footfall. Presumably the congestion concerns refer to problems at peak shopping hours accessing the main car park whilst the low footfall is probably a problem for the more peripheral locations at either end of the High Street.

3.32 In response to Q19 on what improvements to the centre businesses would like to see 'not introducing car parking charges' was ranked highest followed by car parking improvements (2nd), environmental improvements to the area (3rd) and financial help for improvements to commercial buildings (4th).

3.33 The visitor survey recorded that most respondents were fairly frequent visitors (66% weekly or more often) but didn't spend very long in the centre (80% no more than 2 hours). Despite the easy walk-in access 70% arrived by car and 15% cycled but the survey recorded nobody walking to the centre. The most common reason for visiting was food shopping (mentioned by 30% of visitors in a multiple response Q5) followed closely by non food shopping (28%) and working in the centre (22%). Other common reasons given for visiting included eating out (14%), meeting friends / relatives (14%), browsing / window shopping (13%) and visiting the bank / building society (11%).

3.34 Positive aspects of the centre rated by visitors included the range of banks and financial services (191 on a 100 average index), the variety of places to eat and drink (191). Other positive aspects included the ease of walking around (177), the overall attractiveness of the shopping centre environment (175), the cleanliness of the centre (173) and the choice of food shops and supermarkets (169). All indicators scored well above the average 100 except for the only negative aspect which was the availability of parking places (52).

3.35 Overall the business and visitor surveys recorded generally positive views of the centre. Cowbridge is clearly an attractive place to live in and visit as reflected in its role as a dormitory town, rural shopping centre and visitor / shopper destination for the whole of the Vale and beyond. There are many positive aspects to the centre recognised by businesses and visitors alike such as the accessibility and free parking. On balance, the centre performs well on this TAN4 indicator.

Environmental Quality

3.36 As already mentioned the town centre presents a very attractive shopping environment centred on the high street and town hall square. New additions such as Strawberry Fields and Willow Walk are very tasteful additions to the centre. The streets follow the

historic street pattern and there are many quality buildings on the high street such as the town hall and the Regency town houses. Off the High Street there are interesting yards and narrow streets. Away from the shopping centre there are quiet gardens and also the Holy Cross Church, former Grammar School building, the old town walls and the south gate.

3.37 Within the centre itself there are several landmark buildings and Cowbridge does have a good sense of arrival and place. There are a few nodes to assist orientation within the centre although this is not difficult due to the linear nature of the centre along the High Street with a walk along either side forming the main circuit.

3.38 One of the complaints with centre in the business survey was the poor quality maintenance of some buildings (joint 6th) and vandalism and graffiti (joint 6th), however, generally this is of a very good standard although there are a few properties in peripheral parts of the town requiring investment but little evidence of vandalism and graffiti. The public realm within the High Street is good although the pavements are narrow in places but at least not too cluttered with street furniture.

3.39 Overall Cowbridge is a very attractive historic shopping centre and the High Street and connecting yards and streets present a pleasant shopper / visitor experience. The centre contains a number of quality buildings that add to the shopper / visitor experience and generally the centre performs well on this TAN4 indicator.

Perception of Safety and Crime

3.40 The business interviews recorded some concerns about vandalism and graffiti amongst respondents and this was ranked as the joint sixth highest problem with the centre after parking and other problems. However, crime and personal safety that are often associated with vandalism and graffiti was ranked much lower at joint 8th as a problem by businesses in Cowbridge. The minor concerns about vandalism and graffiti were not reflected in the priorities for investment with a greater police presence joint 7th along with more CCTV coverage (joint 7th).

3.41 There didn't appear to be a great deal of support for this concern anywhere else in the business survey and the visitor survey recorded quite high levels of satisfaction with this aspect of the

town centre. The visitor survey recorded 97% of respondents felt safe during the daytime and the 2% who didn't gave their reason as the traffic that made them feel unsafe – presumably the difficulty of crossing the High Street.

3.42 In the visitor survey 40% of respondents also visited the town centre at night – mainly for dining out at restaurants (60%) or visiting the pubs (28%). Of those who didn't visit 41% gave the main reason of the centre being too far away (reflecting the wide catchment of the centre) and 39% said they had no need. Nobody gave personal safety reasons for not visiting Cowbridge at night.

3.43 The town may have a slight vandalism and graffiti problem that is quickly dealt with by the authorities and / or community as there is little evidence of it. Apart from this the centre scores very well on this TAN4 indicator.

The Amount of Edge / Out-of Centre Retail / Leisure Floorspace

3.44 There are no edge or out-of-centre retail / leisure facilities in Cowbridge, however, the town centre does extend sporadically along the high street to the east. There are no other shops or retail facilities for some distance the nearest competing centre being Llantwit Major 5 miles to the south.

3.45 However, the main problem for shops in Cowbridge is the out-of-centre retail facilities at Culverhouse Cross and, to a lesser extent, Llantrisant and Bridgend. The business survey recorded Culverhouse Cross as being regarded as the main competing destinations by more respondents (16%) than any other centre although Cardiff city centre was close behind (14%) followed by Llantrisant Retail Park (12%) and Bridgend Outlet Centre (12%). Out-of-centre superstores were regarded as less of competitor than in other centres probably reflecting the greater comparison offer in Cowbridge. The visitor survey confirmed the views expressed in the business survey with 47% of respondents shopping elsewhere indicating Cardiff city centre was their main non-food destination followed by Culverhouse Cross (16%), Barry town centre (16%) and Bridgend town centre (11%).

3.46 The visitor survey recorded more people (84%) travelling out of Cowbridge for main-food shopping than non-food (70%) but despite this the survey recorded very high satisfaction levels with the food and supermarket offer (169 on a 100 average index). The main destinations for the leaking main-food expenditure were Bridgend Tesco Extra (28%), Culverhouse Cross Tesco Extra (17%), Barry Morrisons (7%), Bridgend Asda (6%) and Cardiff Sainsburys (6%).

3.47 Clearly Cowbridge is losing considerable convenience goods expenditure to competing centres including out-of-centre facilities at Bridgend and Culverhouse Cross. Whilst the frequency of these trips is not as regular as trips to Cowbridge the visitor survey only recorded those people who actually visited the centre and there will be some local residents who rarely visit the town centre. However, the centre will retain much more top-up expenditure between main-food shopping trips (that were less frequent to the distant centres) as there is an excellent specialist and top-up offer in the Centre. In addition the centre also retains a high percentage of comparison goods expenditure for a small centre reflecting the quality independent offer. Overall Cowbridge underperforms on this TAN4 indicator despite the quality non-food offer due to the presence of extensive out-of-centre retail facilities at Culverhouse Cross and Bridgend.

Potential Capacity for Expansion

3.48 The business survey recorded the availability of room to expand as the main advantage of Cowbridge as a business location, however, there must also be problems for

some businesses and / or some parts of the town centre as lack of room to expand was ranked as the fifth highest problem as a business location. In particular the historic street pattern and buildings may present some problems for businesses wishing to expand and may explain the low number of multiples in the centre.

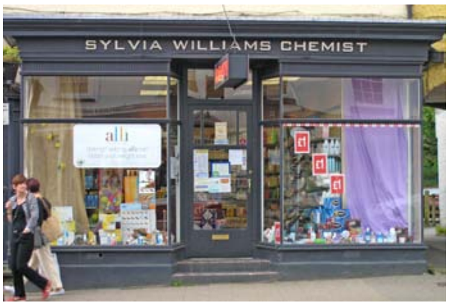
3.49 The 2008 Vale of Glamorgan Retail Planning Study produced by CACI identified significant leakage of main-food expenditure from the Cowbridge area. There are two apparent development sites with reasonable access on the periphery of the town centre. The first is the former Hurran’s Garden Centre site and car park. This is well related to the main shopping frontages but the access may be restricted, particularly for HGV delivery vehicles. The second site is the former cattle market site. This is more peripheral and further from the main shopping frontages but can still be regarded as an edge-of-centre site and the vehicular access is quite good. As a result Cowbridge town centre performs well on this (PPS6) indicator of vitality and viability with the choice of two potential development sites for expansion to meet identified quantitative need.

Summary of Vitality and Viability

3.50 There appears to be a good range of non-food shops and town centre uses in Cowbridge and for a small rural district centre diversity is very good and in particular the specialist fashion and craft shops that draw people from a wide area. However, some visitors do complain about the lack of a swimming pool. The choice of two very small supermarkets and some specialist convenience stores is not that good for a settlement of this size and CACI have identified significant leakage from the catchment area and there are two potential development sites to accommodate the identified quantitative need.

3.51 There is some evidence of recent investment in the shopping centre (Tesco Express) and most premises are very well maintained. The potential capacity for growth is present as reported by most businesses finding it possible to expand in situ, as well as potential development sites for a small supermarket that the catchment can almost certainly support. The town centre does spread in a sporadic fashion to the east and there is a case for consolidation around a retail core

from the bridge up to Church Street.



3.52 The shopping centre environmental quality is very good and the High Street presents a very attractive shopping environment. In addition new developments such as Tesco and Willow Walk have been sympathetic to the historic character of the centre. Vacancy levels are low and well below the national average and there is little evidence of graffiti and vandalism in Cowbridge despite some concerns expressed in the business survey.

3.53 Accessibility is very good for residents of the surrounding residential areas and countryside and the centre draws trade from across the Vale and beyond. Bus and walk-in access are good and, despite the hilly terrain, the visitor survey recorded high numbers of people cycling into the centre. The main access problem is the limited availability of parking in the centre. The business survey also recorded concerns about congestion but these were not supported by the visitor survey or observations on site visits.

3.54 The business survey indicates generally high satisfaction levels with the shopping centre although business confidence might be starting to decline as evidenced by lowering expectations of future turnovers and declining employment levels. The main concern is the limited parking and congestion at times. Customers are very happy with the town centre offer but some would prefer a wider choice of shops and some national multiples in particular. The centre is clearly losing considerable trade to competing centres / destinations.

3.55 In summary, Cowbridge generally presents very good TAN4 indicators of vitality and viability and compares favourably with other district centres in the Vale but struggles to compete with nearby larger centres and out-of-centre destinations, particularly for main-food shopping. The main strengths are the environmental quality, accessibility, the quality / specialist independents, restaurants and other services. The main weakness is the limited car parking and the choice of food shops. The main opportunity is a small supermarket development if a site can be found. The main threat is continued expansion of out-of-centre retailing around competing centres and the introduction of car parking charges.

SWOT Analysis Strengths

- The attractive historic town centre and quality landmark buildings
- The High Street Shopping Environment
- Good accessibility by foot, bus and car
- Two supermarkets
- The specialist independent retailers that attract trade from across the Vale and beyond
- Four banks and many professional services
- Restaurants that attract diners from a wide area into the centre at night

- Good choice of pubs, cafes and takeaways that will attract passing and dedicated trade in the evening
- The Physic Gardens and open spaces close to centre
- Low vacancy rate

Weaknesses

- The limited car parking
- Declining business confidence
- Narrow pavements in places
- Proximity of competing centres including extensive out-of-centre destinations.
- Limited food shopping
- Limited leisure offer / activities for young people
- Sporadic retail frontages at the eastern end of town

Opportunities

- Capacity for small supermarket to claw back excessive leakage
- Two potential development sites to meet identified quantitative need
- DTC St Athan
- Cardiff Airport expansion

Threats

- Continued expansion of competing centres and surrounding out-of-centre destinations
- Introduction of parking charges
- Loss of key / specialist retailers from the town centre

Recommendations

3.56 The centre should retain its district centre designation.

3.57 The southern side of the High Street between Church Street and the Bridge should be designated as primary frontage as shown on Map 6. The northern side the High Street between the Spar / Post Office and the Town Hall should also be designated as primary frontage.

3.58 In the primary frontages non retail uses should be discouraged and no two non-retail uses should be permitted together to ensure the street remains vibrant during the daytime and to discourage 'dead frontages.'

3.59 The remainder of the shopping centre as defined by Goad should be designated as secondary frontage where some non-retail uses will be permitted. This will enable the centre to develop supporting business and leisure services. The frontages to the south of Eastgate from The Limes to number 50 (Antiques Centre) are outside the Goad defined town centre boundary but should be designated as tertiary frontage as this maintains the character of this commercial area.

3.60 The former cattle market site should be designated as an area for retail led mixed use development where a small supermarket will be acceptable providing that satisfactory access and parking can be achieved and the historic setting is respected.

3.61 The former garden centre site should be designated as an area for mixed use development including retail providing that satisfactory access can be achieved. The Council might also consider using part of the site as a second town centre car park.

3.62 The Council should continue to develop its shop frontage policies to ensure inappropriate fascias that detract from the buildings above are discouraged throughout the district centre.

3.63 Any future hotfood takeaways that are permitted should be conditioned to ensure their shutters are opened during main daytime shopping hours and / or that they are open weave style shutters.

3.64 In consultation with the business community the Council should explore new car parking provision and management in the centre

4. Llantwit Major District Centre

Introduction

4.1 This district centre is around eleven miles west of Barry, five miles south of Cowbridge and nine miles east of Bridgend. Llantwit Major serves the surrounding rural population in this part of the Vale of Glamorgan. The town has adopted the role of a dormitory village for commuters to Cardiff, Bridgend and Barry. It is also a minor tourist destination with a nearby beach and campsite.

4.2 The centre is focused on Boverton Road that runs east to west and forms the main high street and just off this is the small uncovered Poundfield Mall, where the anchor Somerfield store is to be found, that backs on to a large (free) surface car park. To the west Boverton Road splits with narrow lanes leading off in several directions. This western part of the town has more the feel of a Pembrokeshire village and presents a very attractive shopping / visitor experience.

4.3 The centre appears to operate as a service centre for the surrounding rural area and has a good range of shops and banks. There are a few national multiples including Somerfield and Co-op Pharmacy, only one / two high street banks. In addition it has several cafes and tourist shops and a number of businesses specialising in health and therapy. Llantwit Major is served by rail on the Vale of Glamorgan Line providing an hourly service between Bridgend and Cardiff, and this station is very close to the town centre. It is also the closest district shopping centre to the rapidly expanding Cardiff airport and RAF St. Athan which is planned for major expansion by the MoD.

4.4 The shopper survey indicates that most visitors to Llantwit Major come from the town itself or very nearby villages as shown in Map 3 (Appendix 1).

Turnover in Relation to Floorspace

4.5 TAN4 advises turnover figures vary greatly and can be of assistance as an indication of the relative activity of different shopping areas and centres. Unfortunately there is no published information for the Llantwit Major District Centre and it is not possible to estimate due to the limited survey evidence. The business surveys for the District Centre indicated that turnovers were generally lower (45%) or the same (26%) as the previous five years with only 29% reporting an increase. This possible decline in turnover is not reflected in the good retail offer in the centre, the quality of the frontages and the physical fabric of many of the business premises.

4.6 The decline in turnover may reflect growing competition from out-of-centre supermarkets and retail facilities particularly in the Bridgend area. The business survey recorded the combined out-of-centre Tesco (9.4%) and Asda (6.3%) superstores at Bridgend being regarded as the main competing destination by 15.7% of respondents, followed by Cardiff city centre and Culverhouse Cross (both 11%) and Bridgend Town Centre. The visitor survey recorded

the majority of visitors to the centre (55.4%) shopped elsewhere for their main-food shopping and of this group 41.7% shopped at the (24 hour) Bridgend Tesco Extra store.

4.7 On a more positive note the business survey recorded slightly increased employment levels over the last two years. It also recorded slightly more optimism about future turnover levels with 34.4% expecting an increase and 25% anticipating static turnover. However, 40.6% still expected turnover to fall compared to the 45% who reported a fall in the last five years. This suggests business confidence might be improving slightly but many businesses expect competition from competing centres, destinations and out-of-centre superstores to eat into their market share.

Commercial Yield on Non-domestic Property

4.8 The commercial yield on a property investment represents the return to the investor for risk taking. It is calculated by dividing the rental value of a property by the capital value at the time of purchase and expressing as a percentage. The lower the percentage yield the longer an investor is prepared to wait for a return indicating confidence in the centre.

4.9 Again yields are not published for Llantwit Major District Centre due to the nature of the shopping centre and the limited number of transactions. Consultations with local agents indicated that they expected yields to be relatively low for Llantwit Major District Centre reflecting reasonable business confidence in the centre.

Shopping Rents

4.10 Again rental information is not available for Llantwit Major District Centre due to the limited number of transactions. The business survey for Llantwit Major District Centre indicated that 85% of business premises were rented although local agents indicate this is often per unit rather than floorspace area and some included flats / offices above. Typical rents for the Llantwit Major District Centre were £10,000 per annum for a 500 sq foot unit which compares unfavourably with Barry town centre where comparable per unit rents were £20,000 per annum in the primary frontages in similar size units[1]. Local agents reported that the highest per unit rents were achieved in the Poundfield Mall and on Boverton Road. The presence of the Red Cross charity shop in Poundfield Mall suggests rents here are not high (there are two other charity shops in secondary frontages).

Retailer Representation and Change

4.11 Successful centres also have a good range of shops including specialist independents and national multiples. There is no

[1] Whilst lower rents are an advantage to some businesses they usually reflect low footfall and are regarded as a weak indicator of viability and vitality. Lower rents also make premises attractive to charity shops and other weak frontages in terms of footfall generation. Whereas stronger centres generate the highest rents..

Experian Goad Centre Report for the Llantwit Major District Centre, however, the Council's survey indicates there are 100 businesses in the centre of which 13 are part of national / regional chains. As well as food retailers (Somerfield, Filco and Spar) these include banks (HSBC, Barclays, Lloyds and Nat West), charity shops (Age Concern and Red Cross) and other services (Co-op Pharmacy, Co-op Travel and Ladbrookes)

4.12 Several of the independent retailers / businesses can be described as quality independents. In the business survey several independents were named as key attractions including Alan Young Butchers / Delicatessen (5.7%), Coast Bakery / Coffee Shop (5%) Nickleby's Bookstore (3.7%) Forza Cycles (3%) and Landswitch Hardware (2.3%). However, in the visitor survey only Nickleby's Bookstore was mentioned

frequently and this was third in popularity (11%) as the favourite shop after Somerfield (31%) and Filco (13%) amongst respondents.

4.13 The visitor survey recorded above average levels of satisfaction with the choice of food shops and supermarkets in Llantwit Major (152 on a 100 average index), however, there was below average satisfaction with the clothes and non-food offer (71 on a 100 average index). This was reflected in high levels of leakage of non-food expenditure (74% of respondents shopped elsewhere) mainly to Cardiff city centre (33%), Bridgend (29%), Bridgend designer outlet (13%) and Culverhouse Cross (8%).

4.14 In terms of missing shops from the district centre the most common response in the visitor survey was the need for more clothes shops (of various descriptions) mentioned by 60% of respondents in the visitor survey who expressed an opinion, followed by more café restaurants (13%) and a music / CD shop (9%).

4.15 Amongst the business community the Post Office was regarded as the most important shop (7.7%), this may reflect the current closure programme and the importance of the PO to the business community. Somerfield (7.3%) was the next most important shop followed closely by Filco (6.7%). This corresponds with the popularity of these shops in the visitor survey but for the business community their importance is in attracting shoppers to the town centre and generating footfall for other businesses. Other important attractions in the centre according to business survey respondents included the Co-op Pharmacy / Opticians (6.7%), The Banks (6.7%), the Village High Street environment (6%) and Alan Young Butchers / Delicatessen (5.7%).

4.16 The business survey also asked about investment plans. Around two thirds of respondents answered this question. All planned to remain in their premises for at least the next year but 22.7% would commit no further. 27.3% expected to remain in their premises for at least the next five years and 50% for as long as the business lasted. In terms of problems within the centre (Q19), lack of room /

premises to expand into was the second highest complaint.

4.17 The Focus database does not record any retail requirements for Llantwit Major and consultations with local agents and the owners of Poundfield confirm there is currently very little interest in the centre other than from local businesses. There has been previous interest by Lidl for a store on land at the Llantwit Major Rugby Club although no formal planning application has been submitted.

Diversity of Uses

4.18 Successful centres are diverse centres that perform a variety of roles to attract a wide range of visitors and shoppers at all times of the day. TAN4 identifies the importance of diversity to the success of a centre. As there is no Goad Centre Report for the Llantwit Major we are reliant upon the Council survey. This indicates that 33% of business units are occupied by shops 24% by comparison (non-food shops) and 9% by convenience shops. The actual percentage of floorspace given over to convenience goods will be much higher as Somerfield and Filco are both small supermarkets that are much larger than any other units in the centre.

4.19 These 67% of the business units occupied by non retail / service uses include:

- 18 retail service uses such as hairdressers / barbers, bookmakers, therapeutic services, tanning centres, tattoo parlours, etc.;
- 17 professional and financial services offices such as (the four) banks, solicitors and estate agents;
- 7 takeaways;
- 6 cafes / restaurants;
- 5 public houses / inns;
- 5 medical centres / clinics; and,
- 9 vacancies.

4.20 In addition there are several community buildings and places of worship including the attractive medieval St. Illtud's Church. The town also has the benefit of a police station. There are also some former industrial buildings renovated for commercial use. The centre is tightly surrounded by residential uses on all sides except to the north where there is a large surface car park and the railway station beyond.

4.21 The level of convenience provision in terms of the number of units (9%) is below the Goad UK average of 10.6%. However, for a smaller local centre serving the day to day needs of local residents it might be expected that the level of convenience provision was higher. In comparison to the Goad UK average (52.6% excluding vacancies) the comparison sector (24%) is under represented which is to be expected in a small centre. Conversely the service sector (67%) is over represented in comparison to the Goad UK average (37.1%). In particular retail service uses (18%) and professional and financial services (17%) are over-represented.

4.22 In the visitor survey the most common response to missing leisure facilities was a cinema (54%) followed by more facilities for young people (26%) and then a leisure centre (8%), swimming pool (8%) and bowling alley (8%). The prospects of a cinema or bowling alley locating in the town are unlikely but the survey perhaps indicates a gap in other leisure services provision.

4.23 Overall the centre displays good indicators of diversity for a small town centre. The retail offer is influenced by the dormitory / tourism role of the centre but in addition there are the specialist medical services and a number of specialist shops that will draw trade from a wider catchment than the immediate rural area. Banks and financial services are particularly well represented. There is a good range of supporting services such as pubs, cafes / restaurants and takeaways. There are no major gaps in local

provision and overall the town centre displays good diversity for a small centre and performs well on this indicator.

Accessibility

4.24 Llantwit Major has good walk in access from surrounding residential areas although there is quite an incline to the south which must discourage walking and cycling to the centre from this direction. Orientation in the newer part of the centre on Boverton Road is reasonable but in the older part with the narrow lanes it is less obvious. In the visitor survey respondents gave the ease of walking around the centre the highest ranking (192 on a 100 Average Index where 200 is the maximum) of any aspect of the centre.

4.25 The town centre has the benefit of its own railway station and the majority (63%) of respondents in the business survey considered this benefited the centre although there are anecdotal reports of the service, which goes to Cardiff via Barry and Bridgend, taking trade out of the town. The frequency of train services was ranked well above average (161 on a 100 Average Index).

4.26 The centre is perceived to be poorly served by buses and this was the most common complaint about the centre in the business survey interviews. However, this was not reflected in the visitor survey where it was ranked above average by (129 on a 100 Average Index) perhaps reflecting the nine bus routes that actually serve Llantwit Major.

4.27 Both the business and visitor surveys found that car parking in, and access by car to, Llantwit Major were good and even a strength of the centre. This probably reflects the extensive surface car parking behind Filco supermarket. In addition there is free time-restricted parking along Boverton Road. The availability of free car parking was actually ranked joint highest benefit (Q18 along with easy customer access) in the business survey. The possible introduction of parking charges in Llantwit Major was not supported by businesses (Q20) and 80% of visitors thought it would discourage shoppers.

4.28 Overall access to the Llantwit Major is very good by most modes with the possible exception of buses that are not as frequent as members of the business community would like.

Pedestrian Flow

4.29 There are no published pedestrian flow surveys for this centre. Our own observations indicate that the two supermarkets and the stretch of Boverton Road and Poundfield Mall between them are the busiest parts of the centre in terms of footfall. The two supermarkets generate high visitor levels and the frontages between them form the main circuit in Llantwit Major. Both Filco and Somerfield back onto the main (free) surface car park and Boverton Road can be accessed via the covered passage separating Filco from the Post Office.

4.30 Footfall in the older western part of the centre is lower as the pavements and roads are narrower and there are fewer shopping frontages between the shops i.e. they are not continuous like on Boverton Road. This is where many of the service uses are to be found which in retail terms are 'dead frontages' and also this is where most of the vacancies in the town are to be found in older / smaller units. However, the presence of key attractions and specialist shops in this part of the town such as Alan Young Butchers and Delicatessen, Pastures Green florist and Forza Cycles ensures reasonable footfall in the area. It is also a very attractive part of the town to wander through although orientation isn't as obvious as on Boverton Road and in Poundfield Mall.

4.31 Overall footfall is very high in Llantwit Major and the centre performs well on this TAN 4 indicator.

The Proportion of Vacant Street Level Property

4.32 Nine (9%) of the 100 retail / business premises in the Llantwit Major are vacant. This is around the Goad UK average of 8.9%. Successful centres have a turnover of vacant property and most of the vacancies in Llantwit Major appear to be short term and / or conversions to residential use. Most vacancies occur in the older western part of the town in small shop units often with poor frontages. During the course of the study two units within Poundfield Mall became vacant and one prominent vacancy on Stag Lane (the vacated Pickwick newsagents, due to relocation to a primary frontage on Boverton Road) has been re-occupied by a hair salon. A second prominent vacancy at the eastern end of Boverton Road remained vacant – the former High Flyers (Party Balloon) Shop that is now trading as an internet company only. Other vacancies in the older part of town include the former Truffles Tea Room and Janet Needham Dressmakers (both these units are probably too far off pitch to be viable for these uses with little passing trade). This suggests that the centre is beginning to perform less well on this TAN4 indicator.

Customer Views

4.33 The shopper survey indicates that most visitors to Llantwit Major come from the town itself or very nearby villages as shown in Map 3 (Appendix *).

4.34 Business survey questionnaires were completed by 34 (34%) of the 100 businesses in Llantwit Major town centre. In addition a visitor survey was undertaken by Pengwyn Market Research with a sample of 65 respondents.

4.35 Retail businesses were slightly over-represented amongst respondents to the business survey – 44% of respondents compared to 33% of businesses in the centre recorded in the Council's own occupier survey. The majority of respondents were long established businesses – 61% over ten years and a further 24% over five years. In terms of why businesses were located in Llantwit Major town centre (Q8) most were for commercial reasons – the market, proximity of other businesses, high footfall, etc. as well as the

accessibility and free parking. The availability of short term leases was the least important locational factor and affordable rent was slightly more important. Together the responding businesses employed c. 240 people of whom around 85 worked full time.

4.36 In terms of positive aspects of Llantwit Major as a location responses to Q18 indicated the availability of free parking and accessibility were the most important. Negative aspects of Llantwit Major as a location (Q19) indicated the bus services and lack of room to expand were the main concerns. Other concerns included personal safety & security problems (3rd), the condition of premises (joint 4th), congestion (joint 4th), train services (joint 4th) and too many takeaways (joint 4th). Presumably the congestion concerns refer to the narrow streets in the old western part of the town which bus services pass through. Whilst there was majority support (63%) for the reintroduction of passenger services on the Barry to Bridgend line, anecdotal evidence suggests some businesses thought it enabled residents to shop further afield including Cardiff city centre and perhaps this is behind this concern.

4.37 In response to Q21 on what improvements to the centre businesses would like to see 'not introducing car parking charges' was ranked highest followed by environmental improvements to Boverton Road (2nd) and general council environmental improvements to the area (3rd). In a separate question (Q17) 90% of respondents supported environmental improvements to Boverton Road and the remainder expressed no opinion. Other areas for improvement included more CCTV coverage (joint 4th) and financial help for improvements to commercial buildings (joint 4th).

4.38 The visitor survey recorded that most respondents were frequent visitors (83% several times per week) but didn't spend very long in the centre (92% no more than 2 hours). Despite the easy walk-in access 63% arrived by car and 34% walked to the centre. The most common reason for visiting was food shopping (mentioned by 55% of visitors in a multiple response Q5) followed jointly by non food shopping (23%) or the bank (23%). Other common reasons given for visiting included browsing / window shopping (9%), meeting friends / relatives (8%) and work (8%).

4.39 In addition to the aforementioned positive satisfaction levels with the parking, access and foodstore provision, other positive aspects rated by visitors included the range of banks and financial services (180 on a 100 average index), the variety of places to eat and drink (142) and the general cleanliness / maintenance of the centre (126).

4.40 Less positive aspects included the availability / cleanliness of toilets (78), the overall attractiveness of the centre (95) and the choice of leisure facilities (103). Whilst the toilets were a concern for visitors this hardly registered in the business survey as a concern. The choice of leisure facilities was only just above the 100 average index but perhaps this can be viewed as positive for a small rural centre where there are unlikely to be extensive facilities.

4.41 Perhaps most surprising is the below average response to the overall attractiveness of the shopping centre environment (95). Whilst the newer part of the centre on Boverton Road is a bit haphazard and unplanned it is not unattractive although obviously in need of some environmental improvements (as proposed by the Council), and the Poundfield Mall is quite an attractive pedestrianised area. The older part of the centre is very attractive and in the business survey the village shopping environment was ranked the 6th most attractive aspect of the centre in a list of 20.

4.42 Overall the business and visitor surveys recorded generally positive views of the centre. Llantwit major is clearly an attractive place to live in and visit as reflected in its role as a dormitory town, rural shopping centre and tourist destination. There are many positive aspects to the centre recognised by businesses and visitors alike such as the accessibility and free parking. On balance, the centre performs well on this TAN4 indicator.

Environmental Quality

4.43 As already mentioned the town centre presents quite an attractive shopping environment and in particular the older western part of the town. Boverton Road is less attractive but functional and the nearby Poundfield Mall is an attractive pedestrianised but uncovered shopping area. There are a number of quality buildings in the older part of town such as St. Illtud's Church, the Town Hall, the Old School building and the Old White Hart Inn and this part of the town has more the feel of a Pembrokeshire village than one in The Vale of Glamorgan.

4.44 The buildings that line either side of the Boverton Road to the east are not as high quality as those in the older part of the centre, there is no uniformity in design and a varying building line but they are at least functional providing retail units attractive to multiples and independents alike.

4.45 Within the newer centre itself there are no landmark buildings and the centre doesn't have a good sense of arrival from this direction. There are few nodes to assist orientation and navigation within this eastern part of the town other than the public art signage for the Poundfield Mall. However, orientation here is not difficult due to the linear nature of the centre along the main frontage of Boverton Road and parallel Poundfield Mall forming the main circuit.

4.46 One of the complaints with centre in the business survey was the poor quality maintenance of some buildings, however, generally this is of a very good standard although there are a few properties in the older part of the town requiring investment. The public realm within the Poundfield Mall is particularly good but the wide pavements on Boverton Road are in need of improvement and

the large surface car park between here and the railway station is not that attractive.

4.47 Overall Llantwit Major is a very attractive shopping centre. A few properties in the older part of town are in need of investment and parts of Boverton Road are beginning to look tired and in need of improvement. The centre contains a number of quality buildings that add to the shopper / visitor experience and generally the centre performs well on this TAN4 indicator.

Perception of Safety and Crime

4.48 The business interviews recorded some concerns about crime and personal safety amongst respondents and this was ranked as the third highest problem with the centre after bus services and lack of room to expand. However, vandalism and graffiti that are often associated with high crime areas was ranked much lower at joint 8^{th} as a problem by businesses in Llantwit Major. The concerns about crime were reflected in the priorities for investment with more CCTV coverage 4^{th} and a greater police presence joint 5^{th} (behind not introducing parking charges and environmental improvements – general (3^{rd}) and specific to Boverton Road (2^{nd})).

4.49 There didn't appear to be a great deal of support for this concern anywhere else in the business survey and the visitor survey recorded quite high levels of satisfaction with this aspect of the town centre. The visitor survey recorded 95% of respondents felt safe during the daytime and all the 5% who didn't gave their reason as the traffic that made them feel unsafe – presumably the vehicles (including buses) passing through the narrow streets of the old town.

4.50 In the visitor survey 65% of respondents also visited the town centre at night – mainly to go the pubs (48%), takeaways (43%), late night shopping (24%) and / or dining out at restaurants (21%). Of those who didn't visit 30% gave the main reason as feeling unsafe in the centre. Of those who did visit the centre at night 50% felt safe and 40% didn't.

4.51 It could be that the concerns about crime and personal safety recorded in the business survey are a response to the everyday security problems that town centre businesses everywhere report. There appears to be some concerns about the safety of the

centre at night but again these are national problems not necessarily specific to Llantwit Major. The town therefore appears to have a slight safety and personal security problem perceived or real and particularly at night for visitors therefore the centre performs less well on this TAN4 indicator.

The Amount of Edge / Out-of Centre Retail / Leisure Floorspace

4.52 There are no edge or out-of-centre retail / leisure facilities in Llantwit Major, however, the town centre does extend sporadically into the older part of the town to the west and on the periphery of the town some former shops have been converted back to retail. There are no other shops or retail facilities for some distance the nearest competing centre being Cowbridge 5 miles to the north.

4.53 However, the main problem for shops in Llantwit Major is the out-of-centre retail facilities at Bridgend and Culverhouse Cross to a lesser extent. The business survey recorded the combined out-of-centre Tesco (9.4%) and Asda (6.3%) superstores at Bridgend as being regarded as the main competing destinations by more respondents (15.7%) than any other centre. Not only do these stores sell convenience goods they also have extensive ranges of town centre and bulky comparison goods. They therefore compete with most stores in Llantwit Major and due to their massive buying power and out-of-centre locations have many trading advantages over the smaller town centre stores. The visitor survey confirmed that these stores are the main-food destinations for many local residents (29%).

4.54 With regard to non-food the visitor survey recorded even more people (74%) travelling out of Llantwit Major to shop although the city / town centres were the main destinations - Cardiff (33%) and Bridgend (29%). However the Brigend Designer Outlet Centre was also the first choice non-food destination for 13% of respondents who travelled out of town, Culverhouse Cross 8% and Llantrisant Retail Park 4%. These shopping patterns reflect the perceptions of businesses of whom 11% regarded Culverhouse Cross (M&S, Tesco, B&Q, PC World etc.) as the main competing centre and 8% Bridgend Designer Outlet Centre.

4.55 Clearly Llantwit Major is losing considerable non-food and convenience goods expenditure to competing centres including out-of-centre facilities at Bridgend and Culverhouse Cross. Whilst the frequency of these trips is not as regular as trips to Llantwit Major the visitor survey only recorded those people who actually visited the centre and there will be some local residents who rarely visit the town centre. In addition to the 45% of respondents who do use shops in Llantwit Major as their main-food destination, the centre will also retain more top-up expenditure between main-food shopping trips (that were less frequent to the distant centres). However, overall Llantwit Major does not perform well on this TAN4 indicator due to the presence of extensive out-of-centre retail facilities at Bridgend in particular.

Potential Capacity for Expansion

4.56 The business survey recorded lack of room to expand as the second main problem with the town centre after the bus services (Q19). In particular this will be a problem for businesses located in the historic western part of the town. Even in the newer part of the centre the surrounding residential areas are built right up to the Llantwit Major District Centre and the only apparent expansion site is the large surface car park between Boverton Road and the railway station.

4.57 The 2008 Vale of Glamorgan Retail Planning Study produced by CACI identified capacity in Llantwit

Major for a mid-sized supermarket in the order of 1,445 sq m (gross) such as a Tesco Metro or Sainsbury's Local. However, there are no development sites to accommodate this other than the main car park for the town centre. This car park that is in the ownership of the Filco supermarket is a key strength of Llantwit Major as recognised by businesses and visitors alike so it would not be viable to redevelop this for retail use site. It might be possible to reduce the car park area and deck part of the car park but this would detract from the historic environment and setting of the centre and in any case probably wouldn't be viable. So apart from small scale encroachment onto the car park by existing units and the piecemeal redevelopment of small sites there are no expansion sites in Llantwit Major and the centre does not perform well on this (PPS6) indicator of vitality and viability.

Summary of Vitality and Viability

4.58 There appears to be a reasonable range of shops and town centre uses in the Llantwit Major and for a small rural district centre diversity is quite good although visitors complain about the limited range of clothes shops. The choice of two small supermarkets and several specialist convenience stores is particularly good for a small centre and overall the centre displays reasonable indicators of diversity.

4.59 There is some evidence of recent investment in the shopping centre but a few premises are poorly maintained and Boverton Road is beginning to look tired and in need of environmental improvements. The potential capacity for growth is present as reported by businesses finding it difficult to expand but the rural catchment and competing destinations will probably make anything bar small scale investment unviable. The town centre does spread into the older town in a sporadic fashion and there is a case for consolidation around a retail core on Boverton Road / Poundfield Mall.

4.60 The shopping centre environmental quality is very good particularly in the older part of the town and also Poundfield Mall. Vacancy levels are increasing and are now around the national average and there are two new prominent vacancies in

Poundfield Mall. Only one of the takeaways has shuttered windows closed during the day and there is little evidence of graffiti and vandalism in Llantwit Major.

4.61 Accessibility is very good for residents of the surrounding residential areas and the town once more enjoys regular train services generally regarded by businesses as a positive contribution to the centre. However, the bus services to the town come in for criticism from businesses although not visitors (most of whom had arrived by car). The free parking is regarded as a positive aspect of the centre by businesses and visitors alike.

4.62 The business survey indicates generally high satisfaction levels with the shopping centre. The main concern appears to be with falling turnover that is probably a result of the downturn in the national economy although clearly the town is losing considerable trade to competing centres / destinations. Customers are generally happy with the town centre offer but would prefer a wider choice of non-food shops and clothes in particular.

4.63 In summary, Llantwit Major generally presents good TAN4 indicators of vitality and viability and compares reasonably with other district centres in the Vale but struggles to compete with nearby larger centres and out-of-centre destinations. The main strengths are the environmental quality, free car parking and accessibility, the two supermarkets supported by the quality independents and good range of services. The main weakness is the limited range of clothes shops and the high level of vacancies. The main opportunity is consolidation and the conversion of some blocks back to residential use. The main threat is continued expansion of out-of-centre retailing around competing centres and the introduction of car parking charges.

SWOT Analysis *Strengths*

- The attractive older town and quality landmark buildings
- Good accessibility by foot, bicycle, car and train
- Free car parking
- The pedestrianised and attractive Poundfield Mall
- Two supermarkets
- The specialist independent retailers that attract trade from beyond the rural catchment area
- Four banks and many professional services
- The Post Office
- Alternative medicine and therapeutic services drawing visitors from a wide area and adding to diversity
- Good choice of pubs, cafes, restaurants and takeaways that will attract passing and dedicated trade in the evening
- Nearby beach and tourism attractions / businesses

Weaknesses

- Lack of expansion sites
- Growing number of vacancies some in prominent frontages

- Proximity of competing centres including extensive out-of-centre destinations.
- Limited non-food clothes shopping
- Limited leisure offer / activities for young people
- Sporadic retail frontages in the older part of town
- Bus services

Opportunities

- Boverton Road Environmental Improvements
- DTC St Athan
- Cardiff Airport expansion

Threats

- Continued expansion of competing centres and surrounding out-of-centre destinations
- Introduction of parking charges
- Loss of key / specialist retailers from the town centre

Recommendations

4.64 The centre should retain its district centre designation.

4.65 The northern side of Boverton Road between Poundfield and the Post Office should be designated as primary frontage as shown on Map 7. The section of Poundfield from Somerfield to Boverton Road should also be designated as primary frontage.

4.66 In the primary frontages non retail uses should be discouraged and no two non-retail uses should be permitted together to ensure the street remains vibrant during the daytime and to discourage 'dead frontages.'

4.67 Both sides of Boverton Road from Poundfield to The Strand and the non primary frontages in Poundfield itself should be designated as secondary frontage where some non-retail uses will be permitted. This will enable the centre to develop supporting business and leisure services.

4.68 The older part of the centre to the east of The Strand where shopping frontages are not continuous but there are several commercial uses should be designated as tertiary frontage.

4.69 In the conservation area the Council should continue to develop its shop frontage policies to ensure inappropriate fascias that detract from the area are discouraged.

5. Penarth District Centre

Introduction

5.1 This district centre is around six miles east of Barry and four miles south of Cardiff city centre. The town was developed as a garden suburb / resort for Cardiff and still very much reflects that role. The centre serves the surrounding suburban population in this part of the Vale of Glamorgan.

5.2 The centre is located on the A4160 that is the main road from Cardiff to Penarth and it is also connected by frequent rail services that terminate at Penarth. The buildings and street pattern still reflect the Victorian / Edwardian origins of the town with many fine buildings, parades, gardens and boulevards.

5.3 The centre is focused on the Windsor Road (A4180) that runs west to east and is home to most of the main shops in the centre – national multiples and independents alike. To the north of Windsor Road there are a number of secondary frontages in the streets set out in a grid iron pattern and there is also a small Victorian arcade. To the south of Windsor Road the shops peter out very quickly into surrounding residential areas except on Stanwell Road, the main road to the railway station where the secondary frontages continue. There are also some attractive secondary parades leading off the station square itself.

5.4 Penarth continues its historical role as a service centre for the surrounding suburbs and has a good range of shops and banks. There are several national multiples including Tesco Express, Boots, WH Smith, Starbucks, Greggs, Specsavers, Blockbuster and Clinton Cards. In addition it has supporting professional services and all the main high street banks are represented. There are numerous quality independent stores, cafes and restaurants adding to the overall offer.

5.5 The shopper survey indicates that most visitors to Penarth come from the town itself but it also recorded several visitors from Barry and a few from Cardiff as shown in Map 4 (Appendix 1).

Turnover in Relation to Floorspace

5.6 TAN4 advises turnover figures vary greatly and can be of assistance as an indication of the relative activity of different shopping areas and centres. Unfortunately there is no published information for the Penarth District Centre and it is not possible to estimate due to the limited survey evidence. The business surveys for the District Centre indicated that turnover fortunes were mixed but the more businesses (41%) reported an increase over the last two years than a decrease (32%) whilst 28% reported they had remained static.

5.7 The business survey recorded a degree of pessimism about future turnover levels with (34%) expecting a decrease, (46%) static turnover and only 20% expected turnover to rise compared to the 41% who reported an increase in the last five years. The business survey also recorded a decrease in employment levels over the last two years with more businesses with decreasing workforces (34%) than increasing (11%) but the majority (55%) had remained static. Overall these business performance indicators suggest confidence may be declining slightly which may reflect the national economy as much as local performance.

Commercial Yield on Non-domestic Property

5.8 The commercial yield on a property investment represents the return to the investor for risk taking. It is calculated by dividing the rental value of a property by the capital value at the time of purchase and expressing as a percentage. The lower the percentage yield the longer an investor is prepared to wait for a

return indicating confidence in the centre.

5.9 Again yields are not published for Penarth District Centre due to the nature of the shopping centre and the limited number of transactions. Consultations with local agents indicated that they expected yields to be relatively low for Penarth District Centre reflecting reasonable business confidence in the centre.

Shopping Rents

5.10 Rental information is not available for Penarth District Centre Values due to the limited number of transactions. The business survey for Penarth indicated that many premises were rented (72%). The availability of short term leases and affordable rents was not a frequent reason given for locating in Penarth by respondents to the business survey suggesting this is not one of the commercial attractions of the centre. In addition affordable rents were ranked quite low amongst positive aspect of the centre as a business location. Conversely the cost of rents was ranked as one of the least problems with the centre perhaps reflecting mixed fortunes amongst businesses in the centre and / or that there are other greater problems with the centre. In addition reduced property costs was only ranked 3rd in the list of priorities for investment in the centre suggesting high rents is an issue for some but not all businesses in Penarth.

Retailer Representation and Change

5.11 Successful centres also have a good range of shops including specialist independents and national multiples. The Experian Goad Centre Report for the Penarth indicates that 47 of the 147 units in the centre were occupied multiples (7 or more branches to the business). The centre had 4 of the 30 Goad major retailers present although this included the now closed Woolworths, the other 3 being Boots, Clintons and WH Smith. 13% of business premises were given over to convenience shops, 34% to comparison goods, 16% to retail services, 13% to banks and financial services and 18% to leisure services (bars, cafes, restaurants and pubs).

5.12 The convenience sector (13%) is over-represented compared to national town centre averages (8%) which is typical for smaller centres and there are a number of specialist food retailers although no fishmonger, frozen food shop or market. (Tesco Express has opened since the Goad survey in October 2007 so this will have increased the convenience goods representation.) The comparison sector (34%) is around the national town centre averages (35%) which is unusual for smaller centres and reflects the quality offer and specialist ladies clothing shops in particular.

5.13 In terms of floorspace occupied, the convenience service sector was slightly under-represented (13%) relative to the national average (14%), although the new Tesco Express should have addressed this, indicating convenience shops in Penarth occupy below national average sized units. The comparison goods floorspace in the centre was around the national average (39%), business services (16%) were over-represented (UK 13%), retail services (13%) were over-represented (UK 7%) and leisure services (19%) were slightly under-represented (UK 22%).

5.14 Penarth is the only centre other than Barry in the Vale to feature in the Javelin Venuescore ranking. This national ranking is based on the quality of the multiple offer only and takes no account of the independent offer in the centre. Penarth has a Venuescore of 14 (compared to Barry's 53 and Cardiff's 312) and has fallen in the national rankings (now 1,538th) since 2007 (then 1,383rd) indicating below average levels of investment in the centre since then by national multiples in comparison to other centres.

5.15 The business survey recorded a significant number of respondents (47%) were long established businesses (over ten years) although 4 businesses (7.5%) were less than one year old. The majority of businesses expected to remain in their premises for more than one year and 28% for at least five years. The number of new businesses and few vacancies suggests the centre is a popular business location and there is demand for any premises that are vacated.

5.16 Several of the independent retailers / businesses can be described as quality independents. In the business survey several independents were named as key attractions including Windsor Arcade (collectively 5.5%), Wason's DIY (5.1%), The Ladies Clothes Shops (4.9%), Robert James Household Stores (4.3%), The Ocha Bar (3.8%) and Rowley's Jewellers (3.2%).

5.17 The visitor survey recorded above average levels of satisfaction with the choice of food shops and supermarkets in Penarth (149 on a 100 average index) and also with the clothes and non-food offer (129). However, there was still very high levels of 'leakage' for main-food shopping (89%) to a number of destinations with Penarth Marina Tesco being the most popular (57%) followed by Ferry Road Asda (11%) and Barry Morrisons (11%). There were lower 'leakage' levels for non-food with 42% of visitors stating this was their first choice destination. Of those travelling elsewhere the most common destinations were Cardiff city centre (55%), Barry town centre (18%), Culverhouse Cross (8%) and Cardiff Bay Retail Parks (8%).

5.18 In terms of missing shops from the district centre the most common response in the visitor survey was the need for more clothes shops of one type or another and 11% of respondents specifically mentioned more cafes and restaurants. However, 58% of visitors couldn't think of a type of shop or missing retailer they would like to see reflecting the generally high satisfaction levels with the retail offer in Penarth.

5.19 Focus record three retail requirements for Penarth including Greggs Bakers, Superdrug and British Heart Foundation for a charity shop. Greggs are already represented in Penarth so presumably have a requirement for a larger unit. Local Agents were unable to confirm any additional national interest but advised there was some local interest in the town centre despite the national downturn.

Diversity of Uses

5.20 Successful centres are diverse centres that perform a variety of roles to attract a wide range of visitors and shoppers at all times of the day. TAN4 identifies the importance of diversity to the success of a centre. The Goad Centre Report for Penarth indicated that leisure services (bars, cafes, restaurants and pubs) were slightly under represented (18%) in terms of unit numbers relative to the UK average (21%) and floorspace taken up (20%) (UK 22%). This indicates leisure services in Penarth are under-represented in terms of the number of units and floorspace occupied relative to the UK average at the time of the survey (October 2007). Specific gaps in local provision include bars and wine bars (the Ocho Lounge opened after the survey), Cinemas and Theatres (there are amateur productions at the Paget Rooms), Discos and Nightclubs and Hotels and Guest Houses.

5.21 The business survey recorded the cafes and restaurants in the town being regarded as the sixth main attraction and in the visitor survey the variety of places to eat and drink was regarded as a positive aspect of the town centre (scoring 157 on a 100 average index). The Goad survey recorded cafes as being over-represented in terms of units and floorspace but restaurants were under-represented although some are in peripheral locations outside the Goad town centre boundary.

5.22 In addition to the quality retail offer the centre also has a good financial services offer occupying 14% of units in the centre that is above the national average (12%) and in terms of the floorspace taken up in the centre (13%) is above the national average (9%). This indicates branches in Penarth are not only well represented they occupy above average size units.

5.23 There are a number of visitor and tourist attractions close to the centre including Windsor gardens, the marina, promenade and pier but there are significant level changes between the centre and these attractions so there may not be that much linkage between them and the centre. The main attraction of the centre is its quality offer and pleasant high street

shopping environment. In the visitor survey the choice of leisure facilities was one of the few negative aspects of the centre (92 on a 100 average index) yet 68% of respondents could not think of a leisure facility they would like to see in the centre. Of those who could a cinema was by far the most common response to missing leisure facilities (56%). Overall the town centre has reasonable diversity for a smaller centre and performs fairly well on this TAN 4 indicator.

Accessibility

5.24 Penarth has good walk in access from surrounding residential areas although there is quite a slope down to the north and east which must discourage walking and cycling from these directions. Orientation in the centre is reasonably easy due to the grid iron layout of the centre focused on Windsor Road although the shops around station square are remote and somewhat peripheral to the main centre. In the visitor survey respondents gave the ease of walking around the centre the highest ranking (196 on a 100 Average Index where 200 is the maximum) of positive aspects of the centre.

5.25 The town centre has a frequent rail connection to Cardiff for commuters and shoppers. This was regarded as a problem along with bus services by some businesses (recorded as the main problems with Penarth as a town centre location) presumably because they see it as a conduit for leaking expenditure to this bigger competing centre of Cardiff. This was not reflected in the visitor survey where the quality and frequency of train (161) and bus services (185) both scored well as positive aspects of the centre. There is, however, no central bus station within Penarth, buses setting down and collecting passengers from stops along Windsor Road and Windsor Terrace.

5.26 Both the business and visitor surveys found that car parking in Penarth was a major problem. There are no off-street car parks in the centre, the nearest being the small station square, and whilst on-street parking is free it is time restricted (1 hour) and in surrounding residential streets available only to resident permit holders. The visitor survey recorded the availability of parking spaces as being the biggest problem with the centre (25 on a 100 Average Index) followed by car access (58). The business survey recorded improving parking facilities as the main priority for investment in the centre. However, the solution to this was not regarded as introducing car parking charges but improving provision by other means.

5.27 Overall access to the Penarth is very good by all available modes but there is clearly a parking problem in and around town centre. There are no off-street car parks in the town centre and the on-street parking is time restricted. As a result of the poor parking provision the centre doesn't perform that well on this TAN4 indicator.

Pedestrian Flow

5.28 The Council have some limited pedestrian flow surveys that indicate the busiest area of the town centre is Windsor Road in the frontages opposite the Windsor buildings / arcade where the main multiples / key Goad attractors such as Boots, Clintons and WH Smith are to be found. Woolworths were also located here and were recorded as a key attractor by Goad, their closure leaves a big gap in the qualitative offer in the centre and will have reduced footfall on this parade. Immediately to the north of the Arcot Street / Hickman Road junctions the frontages immediately end, however they continue sporadically SW down to the station although footfall here is much lower.

5.29 The parade containing the Boots, WH Smiths, Starbucks and Clintons on Windsor Road is probably the main generator of footfall in the centre; however, this will have declined with the closure of Woolworths in this same block. This parade also has two charity shops which are not good generators of footfall. Across the pedestrian crossing on the other side of Windsor Road is the Victorian Windsor Arcade and this and the Windsor building itself is home to some quality independent stores.

5.30 Because of the roughly gird iron layout of this Victorian town there are several pedestrian circuits including the Windsor Mall, however, due to the lack of a main car park and central bus station the starting point for circuits will vary with the railway station being the only constant start. There are two strategic (zebra) pedestrian crossings at two points along Windsor Road that assist pedestrian circulation. There are also zebra crossings at the roundabout at the eastern end of the centre. There are also no crossings in the northern part of the town that may hinder movement although the roads here are much quieter. Overall footfall is very high in the Penarth and the centre performs well on this TAN 4 indicator.

The Proportion of Vacant Street Level Property

5.31 Seven (5%) of the 147 retail / business premises in Penarth were vacant at the time of the Goad survey in October 2007. This was well below the then Goad UK average of 10.4%. However, the Goad plan for the centre ends before the station bridge and there is one additional vacancy here. In terms of floorspace the vacancy rate was even lower (3.4%) compared to the then UK average (8.4%). One of the vacancies in the primary frontages on Windsor Road has been occupied by the Ocha Bar since the Goad survey. However, there are two new vacancies in the same parade following the closure of Wine Rack and Ferraris bakery. Woolworths on the opposite side of Windsor Road is the most notable vacancy in Penarth although there are some charity shops in this primary frontage indicating the parade / centre may not have been performing that well prior to the (national) closure.

5.32 The Council's own floorspace survey that covered a wider area than the Goad Plan

/ Survey recorded 10 vacancies out of c. 175 business properties (pre-Woolworth's closure), a vacancy rate of 6% still well below the national average. Most of the

vacancies in Penarth are in peripheral areas and appear to be short term and there are no the former Woolworths store. Two former vacancies in secondary frontages recorded by Goad are now occupied by businesses and another has been converted to a residential property. Overall the centre performs reasonably well on this TAN4 indicator.

Customer Views

5.33 Business survey questionnaires were completed by 56 (32%) of the 175 businesses in Penarth town centre. In addition a visitor survey was undertaken by Pengwyn Market Research with a sample of 84 respondents.

5.34 Retail businesses were slightly over-represented amongst respondents to the business survey – 53% of respondents compared to 47% of businesses in the centre recorded in the Experian Goad category report. Most respondents were long established businesses – 47% over ten years and a further 15% over five years. In terms of why businesses were located in Penarth town centre (Q8) most were for commercial reasons – the local market, high footfall, accessibility and proximity of other businesses. Together the responding businesses employed c. 355 people of whom around 176 worked full time.

5.35 In terms of positive aspects of Penarth as a location responses to Q17 indicated the strength of the local market as the main benefit, followed by accessibility and the presence of other businesses. Negative aspects of Penarth as a business location (Q18) indicated the public transport access was the main problem, however, this appears to be a reference to the strength of the access to the competing centre of Cardiff rather than local inadequacies. Car parking was frequently mentioned but was a much lower concern than the public transport access. Other problems reported in the business survey included personal safety and security problems (joint 3rd), vandalism and graffiti (joint 3rd), the condition of premises (5th), the unattractive town centre environment (joint 6th), vacant properties (joint 6th), poorly maintained properties (joint 6th), takeaways (joint 6th) and lack of room to expand (joint 6th).

5.36 In response to Q19 on what improvements to the centre businesses would like to see car parking improvements was ranked highest followed by 'not introducing car parking charges' (2nd), reducing property costs (3rd), environmental improvements (4th) and financial help for improvements to commercial buildings (5th).

5.37 The visitor survey recorded that most respondents were fairly frequent visitors (83% weekly or more often) but didn't spend very long in the centre (83% no more than 2 hours). Half the visitors (50%) had travelled by car, 30% had walked and 20% came on the bus. The most common reason for visiting was food shopping (mentioned by 31% of visitors in a multiple response Q5) followed closely by non food shopping (29%), visiting the bank / building society (20%) browsing / window shopping (13%) and meeting friends / relatives (13%).

5.38 Positive aspects of the centre rated by visitors included the ease of walking around (196 a 100 average index), the quality and frequency of bus services (185), the range of banks and financial services (182), the quality and frequency of train services (161) and the variety of places to eat and drink (157). Other positive aspects included the choice of food shops and supermarkets (149), the cleanliness of the centre (149), the overall attractiveness of the shopping centre environment (139) and the choice of non-food shops (129).

5.39 Negative aspects of the centre rated by visitors included the lack of parking (25), the difficulty of getting to the centre by car (58),

the limited range of leisure services (92) and the availability of toilets (96).

5.40 Overall the business and visitor surveys recorded generally positive views of the centre although there are clearly some problems with parking and the good public transport access appears to be regarded by some businesses as a greater benefit to Cardiff than Penarth. However, the town is clearly an attractive place to live in and visit as reflected in its role as a dormitory town, suburban shopping centre, seaside resort and visitor / shopper destination for the wider Cardiff conurbation. There are many positive aspects to the centre recognised by businesses and visitors alike such as the range of shops and services and the strength of the local market. On balance, the centre performs reasonably well on this TAN4 indicator.

Environmental Quality

5.41 As already mentioned the town centre presents a very attractive high street shopping environment centred on Windsor Road. The streets follow the Victorian grid iron pattern and there are many quality buildings in the centre such as the Windsor building and mall, the station square parades and the art deco Washington buildings. Away from the shopping centre there are quiet gardens, St. Augustine's Church, the marina, the promenade and pier.

5.42 Within the centre itself there are some attractive buildings and frontages and Penarth does have a good sense of arrival and place. There are a few nodes to assist orientation within the centre although this is not difficult due to the grid iron layout of the centre.

5.43 After the good public transport access (to Cardiff) the main complaints with centre in the business survey were vandalism and graffiti (joint 3rd), followed by the condition of premises (5th) and the unattractive town centre environment (6th). In joint 7th in the perceived problems with the centre were vacancies, poorly maintained properties and too many takeaways. Observations on site visits confirmed some poor quality and inappropriate fascias as well as a few, but not many, badly maintained premises.

5.44 To the north of the primary frontages there are quite a few takeaways many with shutters closed during the day. Clearly there are some problems with the shopping environment in the centre that are not helped by the growth in vacancies in the primary frontage. However, there

is also evidence of recent investment in the centre in the form of the Ocho Bar, the new Tesco Express and reoccupied vacancies.

5.45 Overall Penarth is a fairly attractive shopping centre and Windsor Road and connecting streets present a pleasant shopper / visitor experience. The centre contains a few quality buildings that add to the shopper / visitor experience but a few are beginning to look tired and in need of investment and the increase in vacancies in the primary frontages has not helped. As a result the centre performs less well on this TAN4 indicator than its 'garden by the sea' billing and local demographics suggest it should.

Perception of Safety and Crime

5.46 The business interviews recorded some concerns about crime and personal safety amongst respondents and this was ranked as the joint third highest problem with the centre along with associated vandalism and graffiti. However, these concerns were not reflected in the priorities for investment with a greater police presence joint 7th along with more CCTV coverage (joint 7th). There is little physical evidence in the centre of vandalism and graffiti so presumably the Council businesses deal with it quite quickly.

5.47 There didn't appear to be a great deal of support for this concern anywhere else in the business survey and the visitor survey recorded quite high levels of satisfaction with this aspect of the town centre. The visitor survey recorded 99% of respondents felt safe during the daytime and the 1% who didn't gave their reason as the traffic that made them feel unsafe – presumably the difficulty of crossing Windsor Road.

5.48 In the visitor survey 41% of respondents also visited the town centre at night – mainly for visiting the pubs (53%) or dining out at restaurants (27%). Of those who didn't visit 30% gave the main reason of the centre being too far away and 24% said they had no need. Only 6% gave personal safety reasons for not visiting Penarth at night although 22% stated they didn't go out at night which may reflect perceived problems nationally as much as the local situation.

5.49 The town may have a slight vandalism and graffiti problem that is quickly dealt with by the authorities and / or community as there is little evidence of it. Apart from this the centre scores fairly well on this TAN4 indicator.

The Amount of Edge / Out-of Centre Retail / Leisure Floorspace

5.50 The main out-of-centre retail facility in Penarth is the Tesco superstore near the Marina and this is the most popular destination for mainfood shopping trips. Not far beyond this are an out-of-centre Morrisons and Asda superstores in Cardiff Bay and there is a fourth superstore (Asda) near the new football stadium within a few miles of the centre. Cardiff Bay is also home to the Ferry Road Retail Park and the city centre is less than five miles and only a few minutes on the frequent train services. In addition the extensive out-of-centre retail facilities at Culverhouse Cross are quickly accessed by road and are only five miles away.

5.51 The business survey recorded the Penarth Marina Tesco as being regarded as the main competing destinations by more respondents (18%) than any other centre although Cardiff retail parks were close behind (14%) followed by Cardiff city centre (9%), Cardiff Bay Asda (Ferry Road) (9%) and Cowbridge (9). 12% of business respondents also mentioned the recently opened Tesco Express as the main competing facility although this may be in response to a negative campaign against it

and in any case the store is in Penarth and may attract / spin-off additional custom to the centre. The visitor survey recorded more people (89%) travelling out of Penarth for main-food shopping than non-food (58%) but despite this the survey recorded fairly high satisfaction levels with the food and supermarket offer (149 on a 100 average index).

5.52 The visitor survey confirmed the views expressed in the business survey with Penarth Marina Tesco being the main food shopping destination for those travelling out-of-town (57%) followed by Cardiff Bay Asda (Ferry Road) (11%) and Barry Morrisons (11%).

5.53 In terms of destinations for non-food shopping other than Penarth, 55% of respondents shopping elsewhere indicated Cardiff city centre was their main non-food destination followed by Barry town centre (18%), Culverhouse Cross (8%) and Cardiff Bay retail parks (8%).

5.54 Although for a small centre Penarth retains a high percentage of comparison goods expenditure the town is still losing considerable expenditure to competing centres including out-of-centre facilities at Cardiff Bay and Culverhouse Cross that are not accessible by public transport. However, the centre is losing even more convenience goods expenditure although this is mainly to the out-of-centre Marina Tesco that is closer although still relatively inaccessible by public transport.

5.55 Whilst the frequency of trips to competing destinations is not as regular as trips to Penarth the visitor survey only recorded those people who actually visited the centre and there will be some local residents who rarely visit the town centre. However, the centre will retain much more top-up expenditure between main-food shopping trips (that were less frequent to the distant centres) as there is a good specialist and top-up offer in the Centre. Overall Penarth underperforms on this TAN4 indicator despite the quality non-food offer due to the proximity of Cardiff and presence of extensive out-of-centre retail facilities at Cardiff Bay and Culverhouse Cross.

Potential Capacity for Expansion

5.56 The business survey recorded the availability of room to expand as the joint sixth disadvantage of Penarth as a business location. In particular the grid iron street pattern and Victorian buildings may present some problems for businesses wishing to expand in situ.

5.57 The 2008 Vale of Glamorgan Retail Planning Study produced by CACI identified significant leakage of main-food expenditure from the Penarth area and highlighted the existence of sufficient spending capacity to support a new supermarket within the town. Unfortunately the town centre is so compact and surrounded by residential areas and constrained by topography and the railway line to the south it is difficult to see where such a development could take place in or around the centre.

5.58 As a result Penarth town centre performs badly on this (PPS6) indicator of vitality and viability as there are no development sites for expansion to meet identified quantitative need and existing businesses find it difficult to expand.

Summary of Vitality and Viability

5.59 There appears to be a good range of non-food shops and town centre uses in Penarth and for a small suburban district centre diversity is very good and in particular the banks and financial services as well as the specialist fashion and clothes shops. However, some visitors do complain about the lack of a cinema and also facilities / activities for youths. The choice of two small supermarkets (Tesco Express and Co-op) and some specialist convenience stores is not that good for a settlement of this size and CACI have identified significant leakage from the catchment area but there are no development sites to address the identified quantitative need.

5.60 There is some evidence of recent investment in the shopping centre (Tesco Express) and most premises are very well maintained. The potential capacity for growth may be thwarted as many businesses reported difficulty in expanding and there are no apparent development sites for a supermarket that the catchment can almost certainly support. The town centre does extend to the south-west towards the station and there is a case for consolidation around the retail core of primary frontages on Windsor Road.

5.61 The shopping centre environmental quality is very good and Windsor Road presents a very attractive shopping environment. In addition new developments such as the Tesco Express in the Washington Building have been sympathetic to the character of the centre. Vacancy levels are low and below the national average although there are some prominent vacancies in the primary frontages on Windsor Road including the former Woolworths shop. In addition there are charity shops in this parade that will not generate footfall. There is little evidence of graffiti and vandalism in Penarth despite some concerns expressed in the business survey.

5.62 Accessibility is very good for residents of the surrounding residential areas and suburbs and the town draws visitors from the wider Cardiff conurbation. Bus and rail access are excellent although there may be concerns that this is taking trade out of the centre as much as bringing it in. The main access problem is the limited availability of parking in the centre recorded in the visitor and business surveys.

5.63 The business survey indicates generally high satisfaction levels with the shopping centre although business confidence might be starting to decline slightly as evidenced by lowering expectations of future turnovers and declining employment levels. The main concern is the limited parking. Apart from the car parking customers are very happy with the town centre although some complain about the lack of

toilets and leisure facilities. The centre is clearly losing considerable trade to competing centres / destinations including out-of-centre retail parks at Cardiff Bay and Culverhouse Cross.

5.64 In summary, Penarth generally presents very good TAN4 indicators of vitality and viability and compares favourably with other district centres in the Vale but as a suburban centre struggles to compete with nearby Cardiff city centre and out-of-centre destinations, particularly for main-food shopping. The main strengths are the environmental quality, accessibility, the quality / specialist independents, restaurants and other services and sufficient spending capacity for a small supermarket to claw back excessive leakage. The main weakness is the limited car parking and the choice of food shops and the limited development opportunities for a small supermarket within or closely related to the centre. The main threat is continued expansion of out-of-centre retailing around competing centres and the possibility of the introduction of car parking charges.

SWOT Analysis Strengths

- The attractive Victorian town centre with attractive parades, buildings and a small covered mall
- The High Street Shopping Environment
- Good accessibility by train, bus, bicycle and foot from surrounding suburbs
- Two small supermarkets
- Four banks and many professional services
- Good choice of pubs, restaurants, cafes and takeaways that will attract passing and dedicated trade in the evening
- Strong demographic profile of immediate catchment area
- The seaside resort, gardens and marina that attract visitors from the wider Cardiff conurbation
- The Windsor Gardens and open spaces close to centre
- Low vacancy rate

Weaknesses

- The limited car parking
- Declining business confidence
- Proximity of competing centres and ease of access to them including Cardiff city centre and extensive out-of-centre destinations
- Proximity of five out-of-centre supermarkets

- Limited food shopping
- Limited development opportunities for a small supermarket within or closely related to the centre
- Limited leisure offer / activities for young people
- Sporadic retail frontages at the south-west end of town

Opportunities

- Additional spending capacity for small supermarket to claw back excessive leakage
- Consolidation of retail core around primary frontages on Windsor Road

Threats

- Continued expansion of competing centres and surrounding out-of-centre destinations
- Introduction of parking charges
- Loss of key / specialist retailers from the town centre

Recommendations

5.65 The centre should retain its district centre designation.

5.66 Windsor Road between Arcot Street and the Windsor Terrace Roundabout should be designated as primary frontage as shown on Map 8. In the primary frontages non retail uses should be discouraged and no two non-retail uses should be permitted together to ensure the street remains vibrant during the daytime and to discourage ‘dead frontages.’

5.67 The remainder of the shopping centre as defined by Goad should be designated as secondary frontage where some non-retail uses will be permitted. This will enable the centre to develop supporting business and leisure services.

5.68 The Council will have to consider whether the parades focused around the station square that are beyond the Goad Map boundary should also be designated as secondary frontages as this has the effect of elongating the centre.

5.69 The Council will also have to consider if there are any sequentially superior sites in or around the centre or elsewhere in Penarth to stem excessive convenience goods leakage to out-of-centre superstores.

5.70 The Council should continue to develop its shop frontage policies to ensure inappropriate fascias that detract from the buildings above are discouraged throughout the district centre.

5.71 Consideration might be given to the replacement of some of the Zebra crossings with Pelican crossings.

5.72 Any future hot food takeaways that are permitted should be conditioned to ensure their shutters are opened during main daytime shopping hours and / or that they are open weave style shutters.

5.721 In consultation with the business community the Council should explore new car parking provision and management in the centre perhaps with a view to decreasing the waiting time in the central areas but extending it in more peripheral streets.

6. Barry Major **District Centre**

Introduction

6.1 This health check was originally undertaken in 2007 as part of the CIH Town Centre Living Study and this section represents an update of that part of the CIH report. The CIH study undertook a similar shopper and business survey in Barry town centre that informed the health check. The findings and recommendations of this update are consistent with the CIH study representing an update only and not an alternative study.

6.2 The CIH study concluded there is only a limited range of uses other than retail in Barry Town Centre that contribute to the vitality and viability of the town. For a major district centre, diversity is not good although there are some facilities in peripheral areas such as the cinema and theatre that add to diversity. Most of the quality cafes and restaurants appear to be located in, and the evening economy centred around, the High Street / Broad Street district centre.

6.3 The amount of retail, leisure and office floorspace in edge and out-of-centre locations has dramatically increased in recent years and is set to increase in the Cardiff Bay area. There has been some recent investment in the town centre although this has not offset the impact of the closure of the anchor Dan Evans department store. The potential capacity for growth in the immediate future is only limited due to the unavailability of major sites.

6.4 The town centre environmental quality is quite good and there is a reasonable choice of multiples and specialist independent shops. Towards the periphery of the town centre in the secondary frontages there are a number of vacancies and there are charity and discount / bargain shops in the Primary Shopping Area.

6.5 Retailer representation and intentions to change representation is not a strong indicator in Barry. The comparison sector has reasonable representation but visitors would like to see more clothes shops and national multiples in the town centre. There is a very limited choice and range of convenience goods outlets in the centre itself. Banks and financial services are well represented in the town centre although most estate agents appear to have their offices in the High Street / Broad Street district centre. The town centre appears not to have re-established its convenience role that has declined since the out-of-centre Morrisons store opened.

6.6 There is very limited retailer demand and Barry appears to be perceived as a lower order centre. The proportion of vacant street level property has decreased slightly in recent months but there is still a shortage of units suitable for multiple retailers. Commercial yields on non-domestic property have recently decreased to a modest 7.5% which compares unfavourably with most competing centres but at least investor confidence is improving and Barry is not being left behind the rest of South Wales.

6.7 Accessibility is fairly good by most modes except for by train as the

station is too far away to generate many shopping trips to the town centre from non residents of the town. In addition, motorists face a shortage of on-street and surface car parking spaces at peak hours. The lack of a central bus station is not a weakness as all services depart and set down from the bus stops outside the library as well as along Holton Road.

6.8 Customer and residents views and behaviour recorded in the CIH visitor survey indicate slight levels of dissatisfaction with the town centre. The main concern for both visitors and businesses is the availability of car parking spaces and toilet facilities. Perception of safety and crime are reasonably good although visitor levels in the evening are very low and local crime levels in the Castleland ward are increasing.

6.9 In summary, Barry town centre presents mixed TAN4 indicators of vitality and viability and compares unfavourably with some competing centres and other shopping centres in the region. The main strength is the semi-pedestrianised high street shopping environment and the falling yields indicating a degree of investor confidence reflected in the business survey results. The main weakness is the limited range of shops, the lack of diversity and the number of car parking spaces. The main opportunity is the small development site adjacent to the Wilkinsons store on Holton Road and the potential to create larger floorplates in existing units. The main threat is the continued expansion of town centre uses including offices, leisure and retail in peripheral locations in the borough such as the Waterfront Retail Park and beyond in Cardiff Bay and city centre.

SWOT Analysis Strengths

- Attractive built environment – quality King Square – attractive refurbished town hall / art gallery / library building
- Improving yields, rental levels and business confidence
- Town Centre Management Service
- 50,000 Catchment population inc. growing affluent population in Waterfront area
- Good accessibility by bus and car
- Free car parking
- Reasonable mixture of national and independent retailers
- Good service offer in particular banking and financial services
- Improving offer and multiples creating floorplates within existing stock
- Linear centre with easy orientation
- Good public open space provision at Central Park and Gladstone Gardens
- Theatre and leisure centre adding to diversity

Weaknesses

- Limited diversity
- Limited range and choice of shops
- Perceived car parking problem amongst business community
- Low market share (29%) within the primary catchment area

- Three out-of-centre supermarkets in Barry
- Limited Town Centre Management Budget
- High vacancy rate
- Charity shops in Primary Shopping Area
- Proximity of out-of-centre and competing town centre destinations
- Lack of evening economy
- Weak office market
- Proximity of housing restricting expansion opportunities
- Distance to railway station(s)
- Dissipated retail / leisure offer within Barry e.g. High Street / Broad Street and Upper Holton Road District Centres
- Some signs of urban decay / vandalism / neglect in peripheral areas and some adjoining residential streets

Opportunities

- Development site(s)
- Potential to combine / refurbish existing units

- Events Programme
- Current Public Realm Improvements
- Car parking management of on-street and surface car parks
- Shop frontages policy
- Potential for more POS around civic buildings
- Footbridge to Waterfront residential area
- Increasing affluent population in Waterfront area
- MoD Proposals at St. Athan

Threats

- Failure to bring development sites forward and increase investor / operator confidence in the centre
- Failure to attract new affluent residents into Barry town centre
- Waterfront redevelopment incorporating competing retail, leisure and town centre uses and / or social housing and / or attracting too many buy to let purchasers
- Loss of key anchor stores due to national closure / contraction programmes
- Continued expansion Culverhouse Cross and other out-of-centre destinations in adjoining authorities
- Development proposals in Cardiff Bay and city centre

Postscript (May 2009)

6.10 The phased programme of public realm improvements suggests increased private sector confidence in the primary shopping area with the opening in 2008 of Subway and Holland and Barratt. Furthermore, a new retail unit is currently under construction on the vacant plot of land on the corner of Evans Street and Holton Road, which will be occupied by Tesco Express. The new store is expected to create between 20 and 30 new jobs.

6.11 However, in keeping with the current economic situation recent months have seen the closure of Ferraris, Card Warehouse, Woolworths and Birthday Cards & Gifts in the primary shopping area. In addition a growing number of independents have also closed in the secondary and tertiary shopping areas.

6.12 The closure of the Woolworths store has left a major gap in the provision at the eastern end of the centre as this was the main anchor for that parade. There are two new vacancies adjacent to the former Woolworths store suggesting the reduced footfall in this part of the centre has already had an impact.

6.13 There has also been the closure of the town's only cinema in April

2009 at the western end of the centre that has greatly diminished the centre's leisure offer and overall diversity.

6.14 In terms of demand for representation in the town centre the Focus database records only two requirements for the centre and local agents confirm that there is very little interest in the centre at the moment although this reflects the national economy as much as local circumstances.

Recommendations

6.15 The centre should retain its major district centre designation.

6.16 The frontages on northern side of Holton Road from Wilkinsons to and including the parade with the former Wilkinsons unit should be designated as the primary frontages as shown on Map 9. On the south side of Holton Road the units from 88 east to Llantwit Street should be designated as the primary frontages.

6.17 In the primary frontages non retail uses should be discouraged and no two non-retail uses should be permitted together to ensure the street remains vibrant during the daytime and to discourage 'dead frontages.'

6.18 The secondary and tertiary frontages are shown on Map 9 where some non-retail uses will be permitted. This will enable the centre to develop supporting business and leisure services. The town centre boundary should be drawn at the civic centre in the west and multi-storey car park in the east to encourage consolidation in the retail core area.

6.19 The Council should undertake a pro-active approach to attracting specific retailers or categories of retailer to the town centre in line with the newly established designations. In addition the Council should actively seek and promote the reopening of the town's only cinema which until its recent closure added to the diversity of the town centre or the development of alternative provision elsewhere within close proximity to the town should be encouraged.

6.20 The Council should also encourage the main landowners in the town centre to create more large retail footprints in existing premises in order to attract new national multiples to Barry.

6.21 The Council should continue to provide grants for improvements to poor quality shop frontages along the whole length of Holton Road.

6.22 In consultation with the business community the Council should investigate the improvement / standardisation of car parking provision / regulations.

6.23 The Council should develop and promote a year round cultural / entertainment events programme along Holton Road and in King Square in particular to attract more visitors to Barry town centre.

7. Upper Holton Road District Centre

Introduction

7.1 This health check was originally undertaken in 2007 as part of the CIH Town Centre Living Study and this section represents an update of that part of the CIH report. The CIH study did not undertake a shopper survey in the centre due to the very low footfall and instead relied upon site visits and interviews with businesses in the centre. The findings and recommendations of this update are consistent with the CIH study representing an update only and not an alternative study.

7.2 There is only a limited range of shops and town centre uses in the Upper Holton Road shopping centre and for a district centre diversity is not good. There is not even a post office which TAN4 advises are typically found in the lower tier local centre. The choice of three convenience stores is however quite good for a small centre and overall the centre displays reasonable indicators of diversity for a local centre but not a district centre.

7.3 There has been very little investment in the shopping centre and many premises are very poorly maintained. Conversions to residential use have generally been of a very low quality. The potential capacity for growth is very limited due to lack of business support and consolidation around a retail core is a much more viable option.

7.4 The shopping centre environmental quality is very poor and there are a high number of vacancies throughout the centre. Many of the units that are still occupied have a tired and neglected appearance displaying a lack of care and investment. Conversions to residential use are generally of a very poor quality and many of the takeaways have shuttered windows adding to the oppressive environment during the day. There is also evidence of graffiti and vandalism throughout the centre.

7.5 Accessibility is fairly good for residents of the surrounding residential areas. However, there is no bus service along Holton Road and only an infrequent service at the eastern end. The parking restrictions vary in the shopping area but in much of the centre it is unrestricted and residents / business owners park all day discouraging passing trade that has also been reduced by the closure of Holton Road in the town centre.

7.6 Interviews with businesses located in the shopping area indicate high levels of dissatisfaction with the shopping centre. The main concern is the high level of vacancies, the limited range of shops and the high number of takeaways and it is a recommendation of this report that no more takeaways are permitted in any of the frontages on Upper Holton Road.

7.7 In summary, the shopping area presents very poor TAN4 indicators of vitality and viability and compares very unfavourably with competing centres and otherdistrict centres in the Vale.

The main strength is the three convenience stores and the few quality independents. The main weakness is the environmental quality, the limited range of shops and the high level of vacancies. The main opportunity is consolidation and the conversion of some blocks back to residential use. The main threat is continued neglect.

SWOT Analysis Strengths

- Good accessibility by foot, bicycle and car
- Proximity of town centre increasing passing trade / some combined trips
- Some specialist retailers that will attract passing and dedicated trade
- Three convenience stores
- Attractive buildings and parades
- Low rentals / property costs / overheads
- Linear centre with easy orientation
- Medical centre and school adding to diversity
- Good choice of takeaway foods that will attract passing and dedicated trade in the evening

Weaknesses

- No Post Office
- Dissipated retail offer making consolidation difficult
- No bank or free ATM
- High vacancy rate
- Shuttered takeaways during the daytime detracting from the streetscene
- Poor quality fascias detracting from otherwise attractive buildings
- Poor quality conversions to residential use
- Much evidence of urban decay / vandalism / neglect / under investment
- Infrequent bus service that only passes eastern end of shopping centre
- Unrestricted on-street parking spaces taken up by residents / business owners discouraging passing trade
- Closure of Holton Road in town centre has reduced passing traffic

Opportunities

- Management of on-street parking to encourage more passing trade
- Consolidation around a retail core
- Marketing of vacancies
- More proactive role for Council in regenerating the centre
- More frequent bus services
- Finding a role for rest of centre – specialist retail / residential / dining out destination
- Shop frontages / fascias / open shutters policy
- Improvement of surrounding residential areas

Threats

- Continued neglect and under investment
- Increased vacancies

Postscript

7.8 Since the CiH study was undertaken the medical centre which occupied two units has relocated to the Waterfront area increasing the number of vacancies in the centre. The only pharmacy in the centre will have suffered some loss of trade as a result of the location although the nearest pharmacy in the main town centre has closed so this may benefit the Pharmacy in Upper Holton Road.

7.9 There have been other changes in the centre since the CiH study including other new vacancies such as the former pet shop that was being used for storage by the neighbouring upholstery business. At the time of the CiH study there were no agents' boards in the centre and now there are four but it is unclear if this is a positive or negative indicator, hopefully it will bring much needed new investment into the centre. One of the quality independents the stained glass shop has left the centre to be replaced by a second tattoo parlour. There has been some positive investment in the centre such as Barry Tyre

Centre improving their two shop frontages on Holton Road. There is also a formerly vacant shop being fitted out to a high standard at the eastern end of the centre.

However, the new vacancies have probably had a negative effect on the overall vitality and viability of the centre.

Recommendations

7.10 The centre should be re-designated as a local centre.

7.11 The centre should be consolidated around a retail core where further non-retail development will not be permitted.

7.12 Outside the retail core the Council should encourage land use change so that the area becomes predominantly residential in character.

7.13 In consultation with the business community the Council should investigate the possibility of parking restrictions in the core retail area to discourage commuter and all day parking and encourage passing trade.

8. Conclusions & Recommendations

8.1 Each centre has been assessed using the TAN4 monitoring indicators as a framework for gauging the vitality and viability of the centre. The study has been informed by visitor and business surveys in the four centres not previously surveyed as part of the CiH study. The two centres covered by the CiH study have been revisited in the form of a short update and revised recommendations.

8.2 Recommendations for each centre are presented after a summary SWOT analysis. There are some common themes in the recommendations such as the need to examine the management of parking in most centres and also the encouragement of appropriate fascia designs through the Council's grant regime and the Council should consider developing shop front design guidance for all district centres. It is recommended that all centres retain their current retail hierarchy designation except for Upper Holton Road which it is recommended is re-designated as a local centre.

8.3 Recommendations for the identification of primary and secondary frontages are presented for all centres except Upper Holton Road where consolidation around a retail core is recommended. Consolidation in other centres is also recommended such as the primary retail frontages of High Street and the secondary (service) frontages of Broad Street in that district centre.

8.4 In Primary frontages the Council it is recommended that the Council seek to maintain a minimum 75% of uses within these frontages for A1 retailing. Generally in primary frontages it is recommended that further non-retail uses are discouraged and that no two non-retail frontages are permitted together to discourage 'dead frontages' that generate low daytime footfall.

8.5 In secondary frontages the Council can be more relaxed about permitting service uses; however as a general rule it is recommended that the Council seek to maintain a minimum 50% of uses within these frontages for A1 retailing. Where hot food takeaways are permitted, it is recommended that they are conditioned to open their shutters during daytime shopping hours.

8.6 The study also proposes the use of tertiary frontages at the periphery of the centres of Holton Road, Barry, Cowbridge and Llantwit Major within which retail units are found, but are still important as they mark the transition between the retail centre and adjoining area. Within these tertiary frontages it is advised that the priority should be given to retaining these premises for commercial uses where viable.

8.7 The CACI study found capacity for new retail development in several of the centres but only in Cowbridge are there obvious expansion sites. There are some bespoke recommendations for other centres such as examining the management of the evening economy in Broad Street / High Street to ensure it doesn't clash with the daytime shopping centre activities on High Street.

8.8 The purpose of the study is to provide baseline information that will inform the emerging Local Development Plan for the Borough. It is recommended that the recommendations of this report for each individual centre are therefore carried through the development plan process including consultation to ensure a sound policy framework for each centre. However, there are some recommendations in this report that will concern other areas of service provision within the Council such as the Town Centre Management Service and the Council should not wait until the completion of the development plan process before implementation if they are adopted by the Council. In addition, there is data from the surveys that has not been fully analysed as part of this study, that the Council may wish to examine further as part of the Council's Town Centre Strategy such as responses to the possible introduction of parking charges in the centres and other proposals associated with the management of these centres

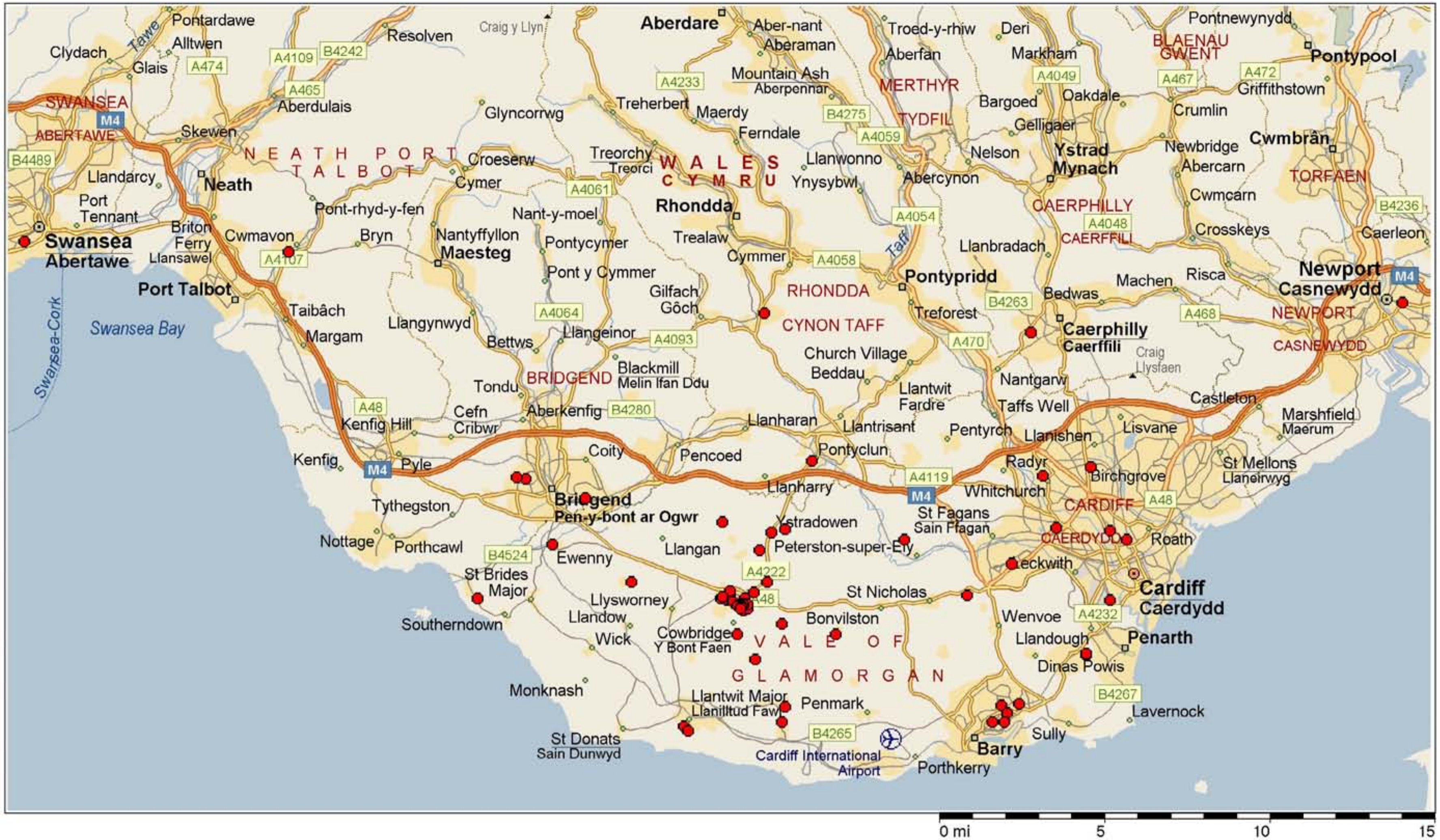
Comparison Goods	Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods.
Convenience Goods	Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers / magazines and confectionery.
Convenience Shop	A shop retailing predominantly food / convenience goods and, for the purposes of unrestricted trading on Sundays under the Sunday Trading Laws, with a maximum sales area of 280 sq m
District Centre	A group of shops separate from the town centre, usually containing at least one food supermarket or superstore, and non-retail services such as banks, building societies and restaurants.
Edge-of-Centre	A location within easy walking distance of the centre normally not more than 200-300 metres from existing town centre shops, providing parking facilities that serve the centre as well as the store, thus enabling one trip to serve several purposes. Lesser distances may be appropriate for smaller town centres and local circumstances such as topography will also determine appropriate distances.
Etailing	Electronic (internet) retailing.
Local Centre	Small grouping of shops usually comprising a newsagent, a general grocery store, a sub-post office and occasionally a pharmacy, a hairdresser and other small shops of a local nature.
Mall	Purpose-built centres incorporating many individual shop units, usually concentrating on comparison goods, and sometimes leisure, residential and other uses.
Out-of-Centre	A location that is clearly separate from a town centre, but not necessarily outside the urban area.
Out-of-Town	An out-of-centre development on a green-field site, or on land not clearly within the current urban boundary.
PPS6	Planning Policy Statement 6, Planning for Town Centres.
Primary Frontages	The most important shopping frontages of the town centre. Most have a high proportion of shops with high rental values.
Primary Shopping Area	Area where retail development is concentrated comprising the primary and contiguous secondary frontages.
Regional Shopping Centre	Out-of-town centres generally over 50,000 square metres gross retail area, typically enclosing a wide range of comparison goods.
Retail Park	An agglomeration of at least 3 retail warehouses.

Retail Warehouses	Large single-level stores specialising in the sale of household goods (such as carpets, furniture and electrical goods) and bulky DIY items, catering mainly for car-borne customers and often in out-of-centre locations.
Secondary Frontages	Important shopping frontages in the town centre, generally with a greater diversity of ancillary retail uses than the primary frontages and lower rental values.
Supermarkets	Self-service stores selling mainly food, with a trading floorspace less than 2,500 square metres, often with car parking.
Superstores	Self-service stores selling mainly food, or food and non-food goods, usually with more than 2,500 square metres trading floorspace, with supporting car parking.
TAN4	Technical Advice Note (Wales) 4, Retailing and Town Centres - November 1996
Town Centre	This covers city, town and suburban district centres which provide a broad range of facilities and services and which fulfil a function as a focus both for the community and for public transport. It excludes small parades of shops of purely local significance.
Tertiary Frontages	Commercial frontages on the periphery of shopping centres with a high level of non retail uses often in former retail units.
Yield	The return to the investor for risk taking calculated by dividing the annual rental value by the capital value of a property at the time of purchase and expressing as a percentage. The lower the percentage yield the longer an investor is prepared to wait for a return indicating confidence in the centre.

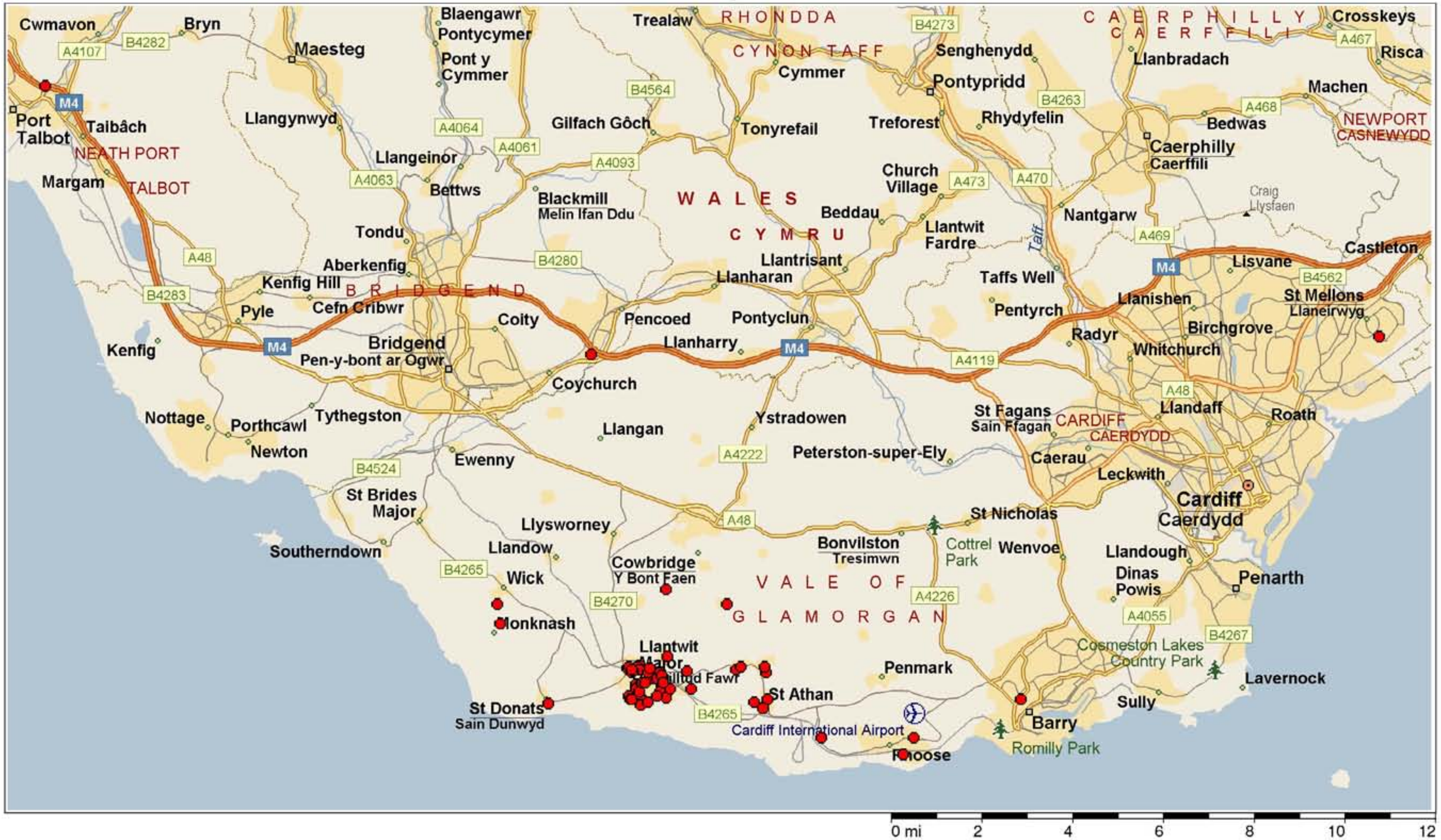
APPENDIX 1 Shopper Survey Origin Maps

Barry Shopper Survey Origin
Map 1

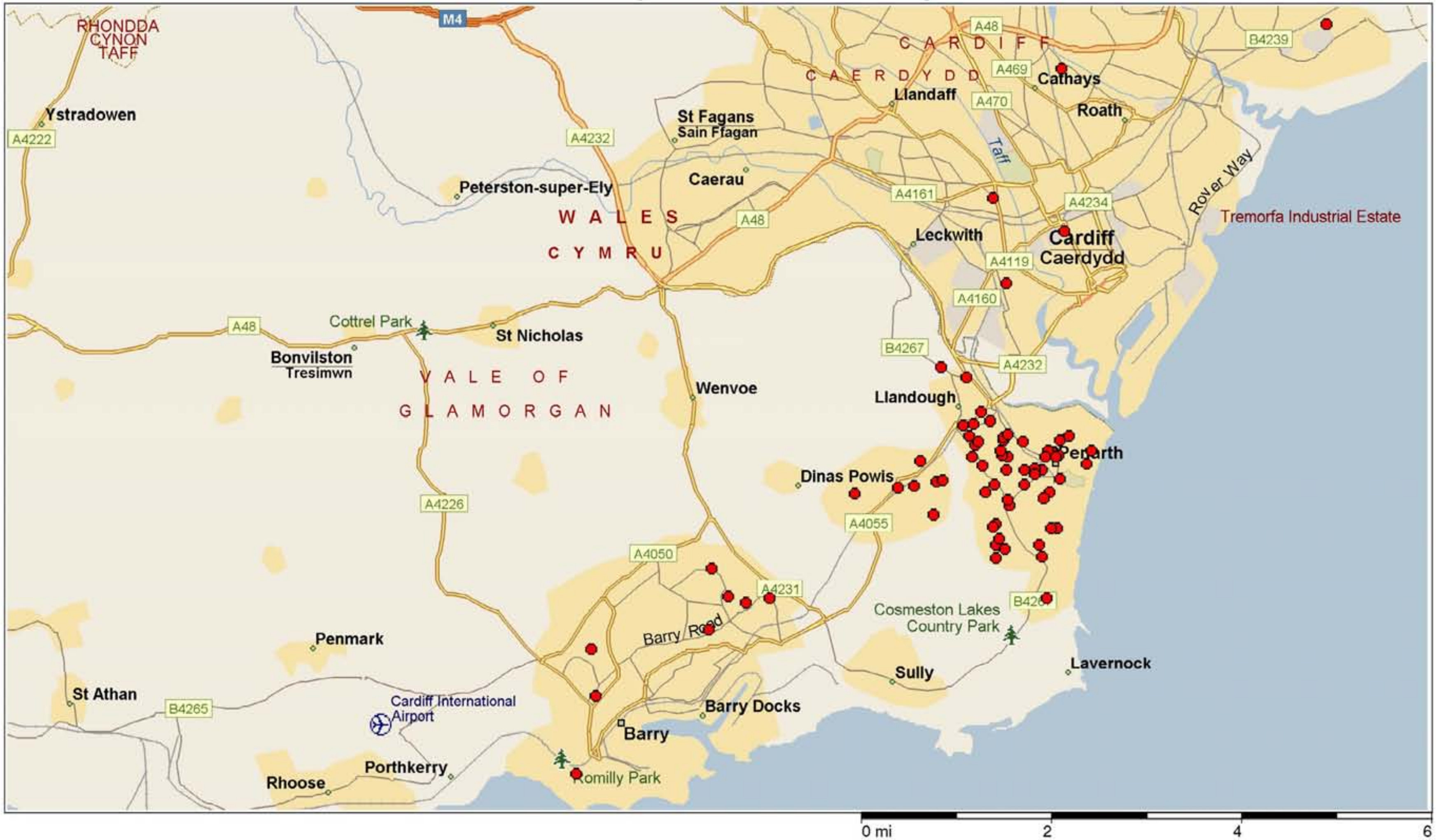
Cowbridge Shopper Survey Origin
Map 2



Llantwit Major Shopper Survey Origin
Map 3

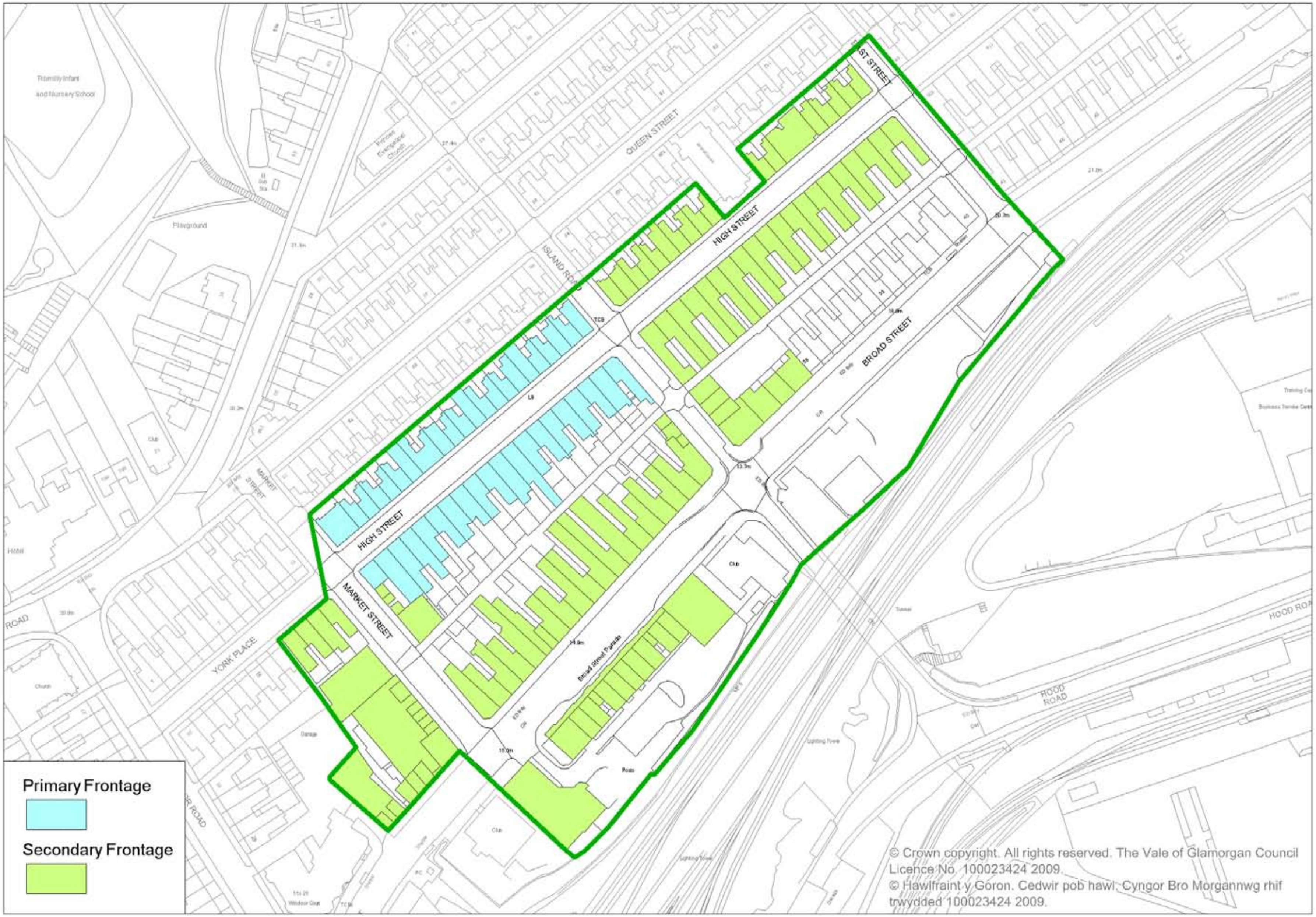


Penarth Shopper Survey Origin
Map 4

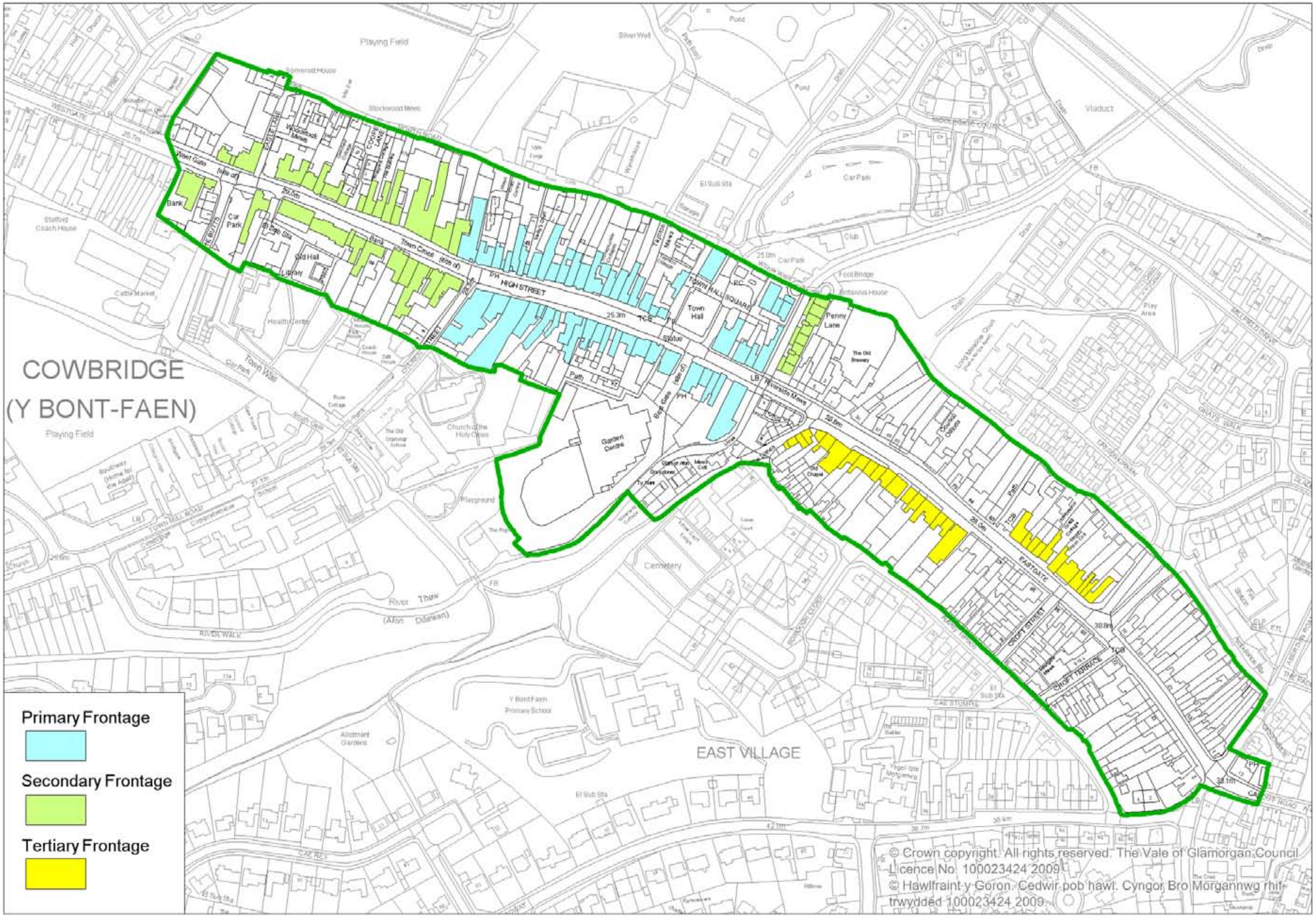


APPENDIX 2 District Retail Boundary and Frontage Designations Maps

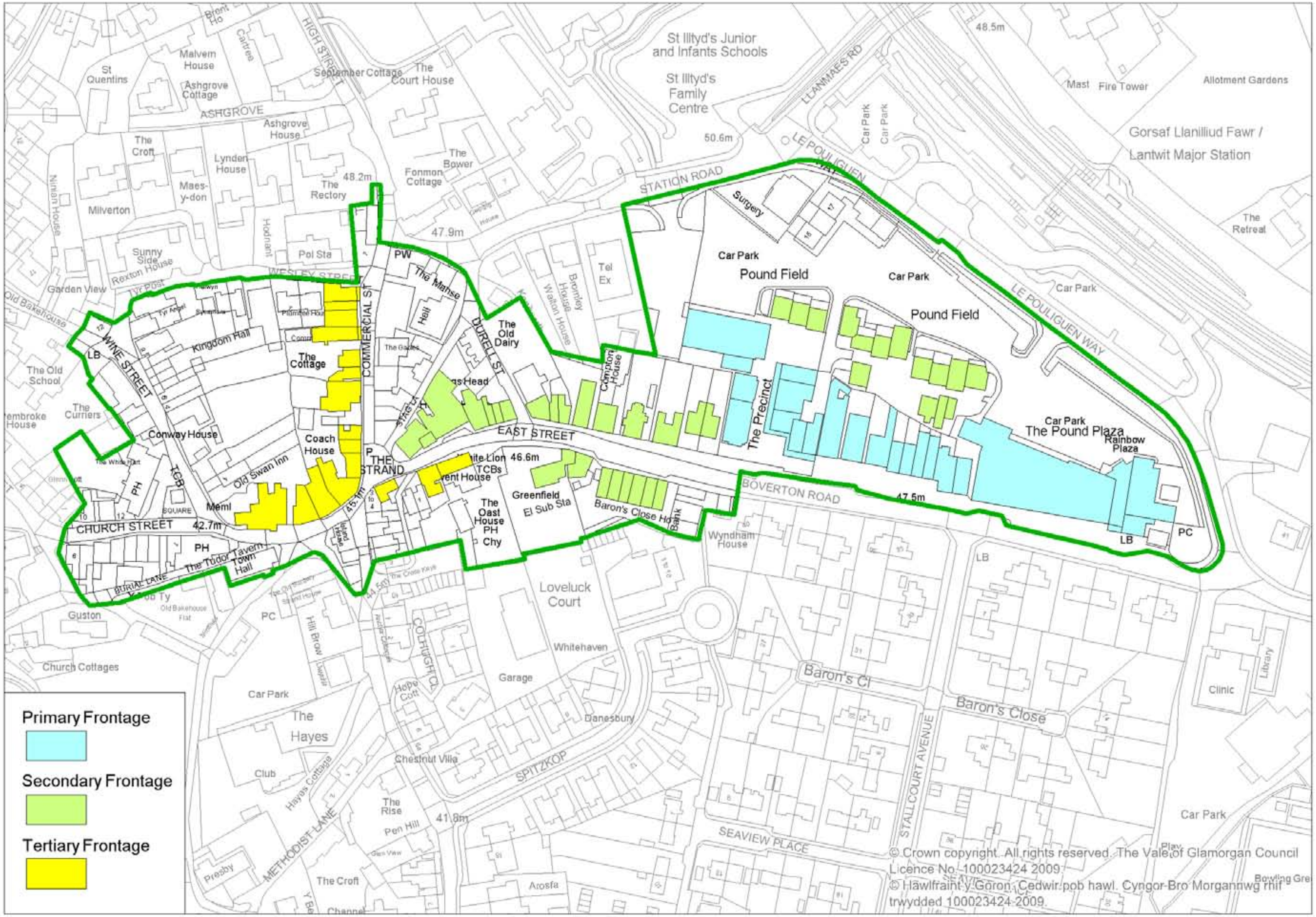
Barry High Street/Broad Street District Retail Boundary and Frontage Designations
Map 5



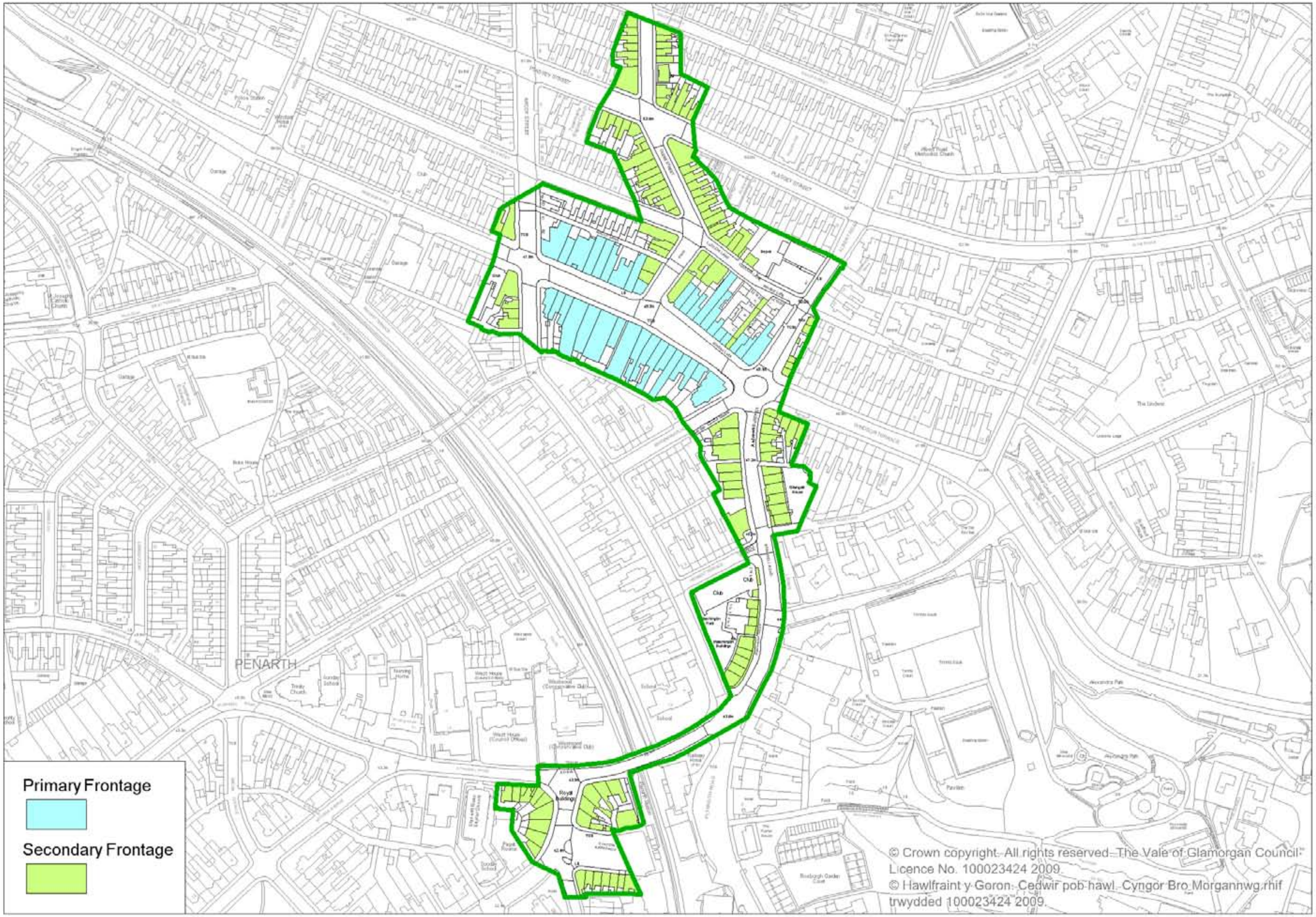
Cowbridge District Retail Boundary and Frontage Designations
Map 6



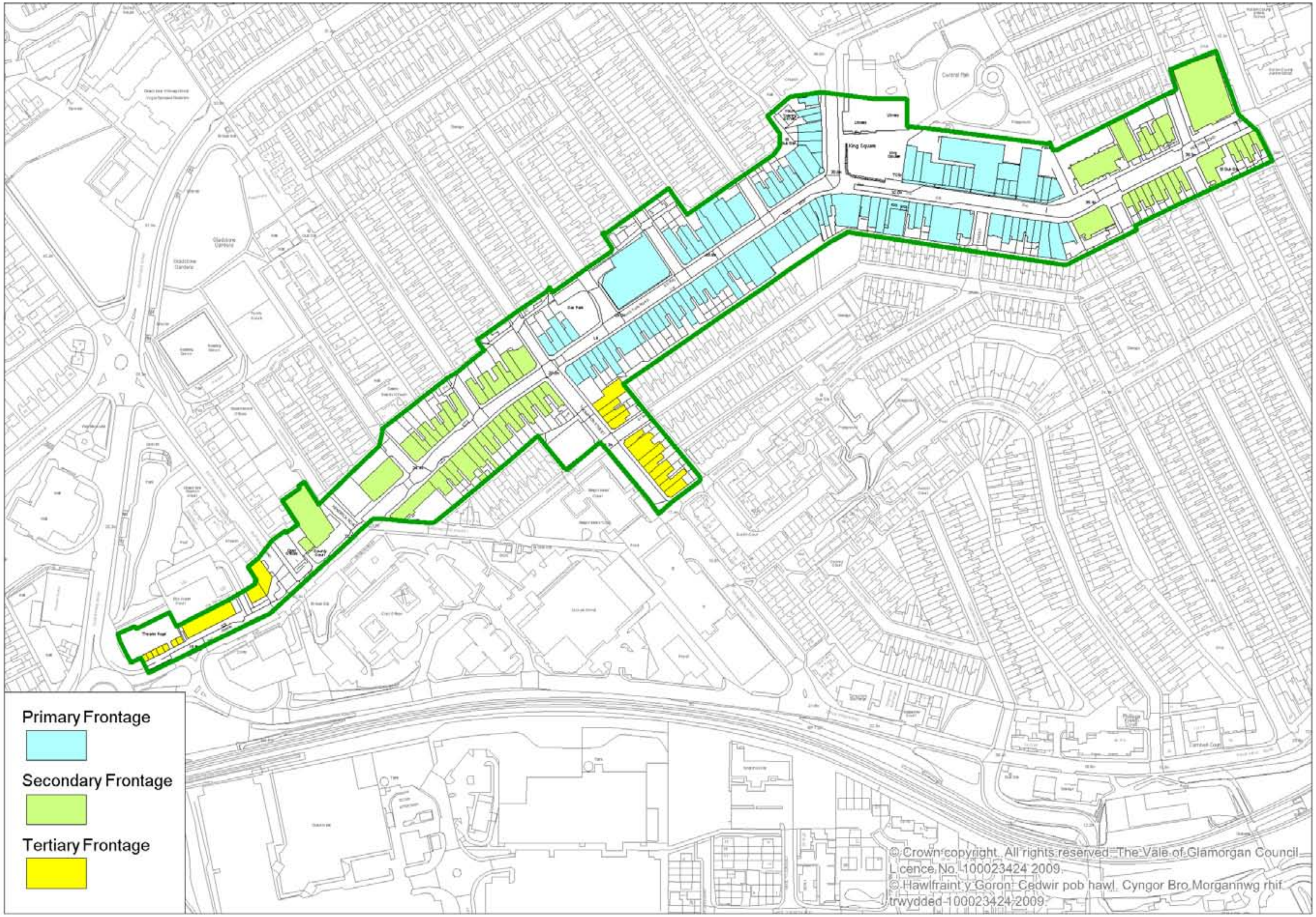
Llantwit Major District Retail Boundary and Frontage Designations
Map 7



Penarth District Retail Boundary and Frontage Designations
Map 8



Barry Holton Road Retail Boundary and Frontage Designations
Map 9



APPENDIX 3 Shopper Survey Sample Questionnaire

Penarth Town Centre Shoppers Survey

Good morning/afternoon. We're doing a survey of people in Penarth town centre on behalf of the Vale of Glamorgan Council. May I please ask you some questions about your visit today?

Q1. How have you travelled to Penarth town centre today?

Car/van, as driver	❑1	Car/van, as passenger	❑2
Bus/coach/minibus	❑3	Train	❑4
Motorcycle	❑5	Bicycle	❑6
On foot	❑7	Taxi	❑8

Other (please specify) ______________________________

Q2. Where have you travelled from today?

Home	❑1	Work	❑2
Friend's/relative's house	❑3	College	❑4

Elsewhere (please specify) ______________________________

Q3. How often do you visit Penarth town centre?

Every day	❑1	Several times a week	❑2
About once a week	❑3	About once a fortnight	❑4
About once a month	❑5	Less often	❑6

Q4. Roughly, how long do you expect your visit today to last?

Up to half an hour	❑1	Half an hour to an hour	❑2
1 to 2 hours	❑3	Over 2 hours	❑4

Q5. For what purpose(s) are you visiting Penarth town centre today? **Tick all that apply.**

Food shopping	❑1	Non-food shopping	❑2
Work	❑3	Browsing/window shopping	❑4
School/college	❑5	Eating out	❑6
Visit bank/building society	❑7	Meet friends/relatives	❑8
Leisure Centre	❑9	Other gym/fitness centre	❑10
Hairdresser/nails/beauty	❑11	Other (please specify) ____________	

Q6. Do you feel that Penarth town centre environment is safe in the daytime?

Yes	❑1	No	❑2

Q7. **(ONLY IF Q6 = NO).** If no, why not? ______________________________

Q8. Do you ever visit Penarth town centre at night?

Yes	❑1	No	❑2

Q9. **(ONLY IF Q8 = NO).** If no, why not? ______________________________

Q10. **(ONLY IF Q8 = YES).** For what purpose(s) do you visit Penarth town centre at night? **Tick all that apply.**

Late night shopping	❑1	Visit pub	❑2
Visit restaurant	❑3	Visit hot food takeaway	❑4
Visit Leisure Centre / Gym	❑5	Other (please specify) ____________	

Q11. Do you feel that Penarth town centre is safe at night?

Yes	❑1	No	❑2

Q12. **(ONLY IF Q11 = NO).** If no, why not? ____

Q13. Do you think the introduction of car parking charges will discourage shoppers from using the town centre?

Yes	❑1	No	❑2

Q14. Is Penarth town centre your main food shopping destination?

Yes	❑1	No	❑2

If YES, go to Q17.

Q15. **(ONLY IF Q14 = NO).** If no, where is your main food shopping destination?
Tick ONE box only.

Barry Lidl	❑1	Barry Morrisons	❑2
Barry Tesco	❑3	Barry town centre	❑4
Barry Waitrose	❑5	Bridgend Aldi	❑6
Bridgend Asda	❑7	Bridgend Lidl	❑8
Bridgend Sainsburys	❑9	Bridgend Tesco Extra	❑10
Bridgend town centre	❑11	Cardiff Aldi	❑12
Cardiff Ferry Road Asda	❑13	Cardiff Sainsburys	❑14
Culverhouse Cross M&S	❑15	Culverhouse Cross Tesco Extra	❑16
Llantrisant Aldi	❑17	Llantrisant Tesco Extra	❑18
Penarth Tesco	❑19	Other (please specify) ____________________	

Q16. If not Penarth town centre, how often do you visit your main food shopping destination?

Every day	❑1	Several times a week	❑2
About once a week	❑3	About once a fortnight	❑4
About once a month	❑5	Less often	❑6

Q17. Is Penarth town centre your main non-food shopping destination?

Yes	❑1	No	❑2

IF YES, go to Q20.

Q18. **(ONLY IF Q17 = NO).** If no, where is your main non-food shopping destination?

Barry town centre	❑1	Bridgend town centre	❑2
Bridgend Designer Outlet Centre	❑3	Cardiff City Centre	❑4
Cardiff Bay Retail Park	❑5	Llantrisant Retail Park	❑6
Culverhouse Cross (M&S etc.)	❑7	Main food supermarket destination	❑8

Other (please specify) ____

Q19. If not Penarth town centre, how often do you visit your main non-food shopping destination?

Every day	❑1	Several times a week	❑2
About once a week	❑3	About once a fortnight	❑4
About once a month	❑5	Less often	❑6

Q20. How would you rate the following aspects of Penarth town centre?
TICK ONE BOX FOR EACH ASPECT.

	Good	Average	Bad
a.Ease of getting to the shops by car			
b. Availability of parking spaces			
c. Quality and frequency of bus services to the town centre			
d. Quality and frequency of train services to the town centre			
e. Ease of walking around the shopping centre			
f. Choice of food shops and supermarkets			
g. Choice of clothing and non-food shops			
h. Range of banks and financial services			
i. Variety of places to eat and drink			
j. Choice of leisure facilities			
k. Availability/cleanliness of toilets			
l. Overall attractiveness of the shopping centre environment			
m. Cleanliness/maintenance of the centre			

Q21. Which is your favourite shop in Penarth town centre? ____________________________

Q22. Which new shop(s) would you like to see come to Penarth town centre?

Q23. What leisure/entertainment facilities would you like to see in Penarth town centre?

Q24. What is your home postcode? ______________________
If home postcode not known, ask for town/village AND street/road.

Q25. Into which of the following age groups do you fall?

16 to 24	❑1	25 to 34	❑2	35 to 44	❑3
45 to 54	❑4	55 to 64	❑5	65 or over	❑6

Q26. Gender of respondent

Male	❑1	Female	❑2

Thank respondent and close interview

==

Interviewer's Declaration

Name of respondent ____________________________

Telephone no (for back-checking only) __________________

I confirm that I personally carried out the interview with the above person (who was previously unknown to me) in accordance with the survey instructions and the Market Research Society's Code of Conduct and that I asked all the necessary questions and correctly recorded the answers given.

Signed _____________________________ **Date** _______________________

APPENDIX 4 Business Summery Sample Questionnaire

COWBRIDGE TOWN CENTRE
BUSINESS OWNERS' SURVEY

VALE of GLAMORGAN
BRO MORGANNWG

This survey forms important background information for the Council's emerging Local Development Plan. We would like to hear your views and very much appreciate the few minutes of your time it will take to complete. Your views will be treated in confidence and your responses will not be attributed to you in any reporting of the information you provide.

Name	
Name & Address of Business	
Telephone number	
Email address	

1. What type of business is operating from these premises?

Please tick

Retail		Service		Restaurant/ Bar		Recreation/ Leisure	
Legal		Financial		Industry		Other	

2. How long has this business been operating from these premises?

Please tick

Less than 1 year		1 to 5 years		6 to 10 years		Over 10 years	

3. How many people does your business employ at these premises?

Write in number

4. How many of these employees live within 5 miles of the centre?

Write in number

5. How many of these employees work on a full time basis?

Write in number

6. Over the past two years how has your permanent (part / full time) workforce changed?

Dramatic decrease		Decrease		No change		Increase		Dramatic increase	

8. Why is your business located in this area?

Ring one box for each reason

	Main Reason	Part of reason	Not a reason
Affordable rent	1	2	3
Availability of short term leases	1	2	3
Good accessibility	1	2	3
Availability of free car parking in centre	1	2	3
Close to other businesses	1	2	3
Serves local market	1	2	3
To be within town centre	1	2	3
High level of pedestrians (footfall) past premises	1	2	3
Business already set up when I took over	1	2	3
Other reason/s (please specify) …………………………………………………..	1	2	3

9. What has been the general trend in your business in the past 5 years in terms of trade, turnover and profit? Has it

Ring one box

Increased	1
Remained static	2
Decreased	3

10. What do you expect the general trend will be over the next 5 years in terms of trade, turnover and profit? Will it:

Ring one box

Increase	1
Remain static	2
Decrease	3

11. Do you plan to remain in these premises?

Ring one box

For at least the next year	1
For at least the next five years	2
For as long as the business lasts	3

12. Do you rent/lease the premises?

Ring one box

Yes	1
No	2

13. Do your business premises have living accommodation above?

Ring one box

Yes	1
No	2

If no go to Q16

14. How many people live in the accommodation?

Write in number

15. Are any of these people employed by your business?

Ring one box

Yes	1
No	2

16. Are there any other uses other than residential above your premises e.g. offices

If yes please specify type of use:____

17. Are there any aspects of the area which benefit your business?

Ring one box for each item

	Definitely an advantage	Some advantage	No effect
Room to expand	1	2	3
Good road network	1	2	3
Availability of free parking	1	2	3
Employees live in area	1	2	3
Good bus services	1	2	3
Easy for employees to get to	1	2	3
Easy for customers to get to	1	2	3
Local demand for product/service	1	2	3
Affordable premises to buy for expansion	1	2	3
Presence of other businesses	1	2	3
Affordable rents	1	2	3
The variety of shops	1	2	3

18. Are there any problems with the area that affect your business?

Ring one box for each item

	Not a problem	Some problem	Definitely a problem
Parking	1	2	3
Congestion	1	2	3
Bus services	1	2	3
No room to expand	1	2	3
Cost of Rents	1	2	3
Condition of premises	1	2	3
Unattractive centre/environment	1	2	3
Lack of private investment	1	2	3
Limited range of shops	1	2	3
Low levels of pedestrian movement (footfall) in area	1	2	3
Poorly maintained properties nearby	1	2	3
Vacant properties nearby	1	2	3
Vandalism and graffiti	1	2	3
Too many takeaways nearby	1	2	3
Personal safety & security problems	1	2	3
Other (please specify) …………………………………………………………	1	2	3

19. What would you like to see done to improve the area for your business?

Ring one box for each item, with 1 being the most important and 5 being of least importance

Increase range / choice of shops	1	2	3	4	5
Improve parking facilities	1	2	3	4	5
Introduce car parking charges	1	2	3	4	5
Not Introduce car parking charges	1	2	3	4	5
Improve local road network	1	2	3	4	5
Improve public transport	1	2	3	4	5
Reduced property costs	1	2	3	4	5
Financial help for improvements to commercial buildings	1	2	3	4	5
Council to improve environment of area	1	2	3	4	5
More public toilets	1	2	3	4	5
More pedestrianised areas	1	2	3	4	5
Town centre wardens	1	2	3	4	5
Greater police presence	1	2	3	4	5
More CCTV coverage	1	2	3	4	5
Other (please specify) …………………………………………………………………	1	2	3	4	5

20. What do you think are the main attraction(s) in the centre?

Tick all that apply

Tesco Express Supermarket	
Filco Supermarket	
The Post Office	
Spar Convenience Store	
Arthur John & Co.	
Jon Dan Limited Jewellers	
Etcetera	
The Ladies Clothes Shops	
Furniture / furnishings shops	
Pharmacy / chemists	
The Willow Walk / Riverside Shops / Mall	
Other Independent stores	
Any one particular store / shop / business (please specify)	
The Psychic Gardens	
The Cafes and Restaurants	
The Hotfood Takeaways	
The Bars and Pubs	
The Banks	
The Estate Agents	
High Street Shopping Environment	
Other (please specify)	
Don't know	

21. Please indicate which you feel to be the main competing centres with regards to your business/organisation

Tick all that apply

Bridgend Town Centre	
Bridgend Designer Outlet Centre	
Bridgend Tesco Extra Store	
Bridgend Asda Store	
Bridgend Sainsbury Store	
LLantwit Major Town Centre	
Llantrisant Retail Park	
Culverhouse Cross (M&S, Tesco, B&Q, PC World etc.)	
Cardiff City Centre	
Cardiff Retail Parks	
Barry Town Centre	
Barry Morrisons	
Waterfront Retail Park (Halford's, Argos, etc.)	
Barry Tesco Store	
Barry Waitrose	
Penarth Town Centre	
Other Retail Parks (Please specify)	
Business(es) elsewhere in this shopping centre (please specify)…………………………..	
Other (Please specify)	

22. Do you operate your business on a Sunday?

Yes	1
Before/around Xmas only	2
Never	3

THANK YOU FOR TAKING THE TIME TO COMPLETE THIS SURVEY

PLEASE RETURN IT TO THE VALE OF GLAMORGAN COUNCIL IN THE FREEPOST ENVELOPE PROVID