

RETAIL AND COMMERCIAL LEISURE STUDY

ON BEHALF OF VALE OF GLAMORGAN COUNCIL

June 2023

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1. Executive Summary

- 1.1 This Retail and Leisure Study has been commissioned by the Vale of Glamorgan Council. The preparation of the Study has been led and co-ordinated by Nexus Planning, with specialist input from NEMS Market Research on the empirical survey work, and Experian on data production.
- 1.2 The purpose of the Study is to inform the evidence base for the Council's Replacement Local Development Plan 2021 – 2036 (RLDP). It aims to provide the Council with an up-to-date, objective assessment of retail and leisure development needs in the Council area and considers possible strategic policy responses to any prevalent or emerging issues.
- 1.3 The Study has been prepared to reflect the requirements of Planning Policy Wales (PPW) Edition 11 (2021) and Technical Advice Note (TAN) 4: Retail and Commercial Development (2016); and it has also been informed by the relevant local retail policy context of the adopted Local Development Plan (2017).
- 1.4 The Study starts by summarising the key current and future retail trends. The current economic circumstances arising from the Covid-19 pandemic, Brexit and the conflict in Ukraine cause the retail and leisure market to continue to be somewhat unstable. Sluggish expansion in household incomes and tepid consumer confidence mean a limited ability or appetite for consumer spending across retail goods and leisure activities. In the meantime, the rise in internet retailing has been accelerated and this continues to have clear implications on the viability of some 'bricks and mortar' retailers. However, this does not mean that physical retail is to become obsolete. Omni-channel is retailing increasingly becoming the norm across the industry. Overall, in a market disrupted by continued changes in consumer behaviour, investing in the consumer experience is anticipated to be the key to success in securing resiliency in retail stores moving forward. Planning policy can therefore play an important role in helping to future-proof designated centres against the ongoing uncertainty.
- 1.5 The Study reviews existing market shares across the Study Area, informed by the telephone Household Survey which comprised 502 interviews across five postcode-defined Zones. Overall, the Study summarises the key findings regarding internet shopping patterns, as well as a survey-derived market share analysis for convenience and comparison goods spending at bricks and mortar locations. We also examine the level of take-up for various leisure activities and examine any locally identified deficiencies in provision.
- 1.6 Our assessment finds quantitative capacity for convenience goods floorspace, and that in qualitative terms there is a potential need for additional provision in Barry Holton Road town centre; Penarth district centre and Llantwit Major district centre. There is also capacity for an additional cinema, which should be directed towards Barry Holton Road town centre and/ or Cowbridge district centre as these lack in leisure offer.
- 1.7 In all cases, it should be noted that any inability to accommodate capacity within designated centres, should not result in the need to allocate out-of-centre sites which might be harmful to the vitality and viability of those centres.
- 1.8 The study finds much less capacity for comparison floorspace, and some pent-up consumer demand for more Restaurants, Pubs, Bars and Café. However, our advice is that the delivery of these uses should be first directed towards re-occupation of vacant floorspace in designated centres.
- 1.9 The Study also provides detailed health check assessments for the five town and district centres in the Council Area. For each centre, the Study recommends place-specific interventions.
- 1.10 The Study concludes by providing guidance to inform the emerging Local Development Plan on the following matters: The hierarchy of centres; the spatial extent of centres; and recommended planning policy approach.

2. Introduction

Overview

- 2.1 This Retail and Leisure Study has been commissioned by The Vale of Glamorgan Council (“the Council”). The preparation of the Study has been led and co-ordinated by Nexus Planning (“Nexus”), with specialist input from NEMS Market Research on the empirical survey work, and Experian on data production.
- 2.2 The purpose of the Study is to inform the evidence base for the Council’s Replacement Local Development Plan 2021 – 2036 (RLDP).
- 2.3 The Study has been prepared to reflect the requirements of Planning Policy Wales (PPW) Edition 11 (2021) and Technical Advice Note (TAN) 4: Retail and Commercial Development (2016); and it has also been informed by the relevant local retail policy context of the adopted Local Development Plan (2017).

Structure of the Study

- 2.4 This report is structured as follows:
- Section 3 provides a summary of the key national and local retail policy context relevant to the Study.
 - Section 4 summarises key current and future retail trends and, in doing so, provides the overarching context for this Study and how it can be used to guide plan-making.
 - Section 5 defines the Study Area and describes the Household Survey undertaken to inform this Study. It summarises the key findings on internet shopping patterns, and the survey-derived market-share analysis for convenience and comparison goods retailing at ‘bricks and mortar’ locations, as well as comments on the existing leisure trends. The results of the quantitative capacity assessment for new retail (comparison and convenience goods) and leisure floorspace in the Council area are described in detail.
 - Section 6 describes our health-check methodology.
 - Sections 7 to 11 set out health-check assessments for the Town and four District Centres (namely Barry Holton Road Town Centre; Barry High Street / Broad Street District Centre; Cowbridge District Centre; Llantwit Major District Centre; Penarth District Centre)
 - Section 12 provides guidance to inform the emerging replacement Local Development Plan on the following matters: The hierarchy of centres; the spatial extent of centres; and recommended planning policy approach.

3. Policy and Legislative Context

Introduction

3.1 In this section, we provide a succinct account of the current national and local policies relevant to retail planning and town centres. This review provides a benchmark of the existing policy context, as well as the basis to formulate strategy and recommendations later in this Study.

National and Regional Planning Policy Context

3.2 Primary Policy is contained in **Planning Policy Wales: Edition 11 ('PPW') (February 2021)**. Policy on Retail and Commercial Development is contained in paragraphs 4.3.1 to 4.3.48.

3.3 PPW considers the following in regard to Retail and Commercial Development:

- Retail and commercial centres are hubs of social and economic activity and the focal point for a diverse range of services, which support the needs of local communities. They are highly accessible to different modes of transport and are in the most sustainable locations for new development;
- Retail and commercial centres should be identified in development plans and include established city, town, district, local, village and neighbourhood centres, which provide a range of shopping, commercial and leisure opportunities as well as places of employment, education, civic identity and social interaction. Opportunities to live in these centres, combined with their good public transport links, make them the most sustainable places; and
- The Welsh Government identifies a number of overarching objectives for retail and commercial centres, which planning authorities should aim to deliver through their development plan and development management decisions ensuring their maximum contribution to the well-being goals.

3.4 Therefore, the planning system must:

- promote viable urban and rural retail and commercial centres as the most sustainable locations to live, work, shop, socialise and conduct business;
- sustain and enhance retail and commercial centres' vibrancy, viability and attractiveness; and
- improve access to, and within, retail and commercial centres by all modes of transport, prioritising walking, cycling and public transport.

3.5 **Technical Advice Note 4 ('TAN 4'), (November 2016)**, deals with Retail and Commercial Development. It should be read in conjunction with PPW, which as we describe above, sets out the land use planning policies of the Welsh Government, and forms part of national planning policy for Wales. PPW, TANs and Circulars should be considered by local planning authorities in Wales in the preparation of Development Plans. They may be material to decisions on individual planning applications and will be taken into account by Inspectors and the Welsh Government in the determination of appeals and called-in planning applications. TAN 4 provides technical guidance to supplement the policies set out in PPW, identifying those technical issues that will need to be considered in planning for the retail industry.

- 3.6 In particular, TAN 4 provides additional detail on the methodology for presenting and interpreting the tests of need, impact and the sequential approach for all retail and main town centre use applications in Wales. We discuss these aspects in more detail in section 12.
- 3.7 **‘Future Wales: The National Plan 2040’ (2021)** is the national development framework, setting the direction for development in Wales to 2040. Two main policies are most relevant to this Study:
- Policy 2 ‘Shaping Urban Growth and Regeneration – Strategic Placemaking’ provides the basis for local planning authorities to support intensification in and around town centres. This will support the future of our town centres and provide opportunities for small-scale development, including new housing and mixed-use development.
 - Policy 6 ‘Town Centre First’ recognises the impact of COVID-19 on the retail sector and the need to make town centres multi-functional places. The policy seeks that significant new commercial, retail, education, health, leisure, and public service facilities must be located within town and city centres. They should have good access by public transport to and from the whole town or city and, where appropriate, the wider region. A sequential approach must be used to inform the identification of the best location for these developments, and they should be identified in Strategic and Local Development Plans.
- 3.8 **‘Building Better Places’ (2020)** sets out the Welsh Government’s planning policy priorities to assist in taking action in the recovery period after the Covid-19 pandemic crisis. The document sees the planning system as a centre stage in the consideration of built and natural environment issues that have arisen from this situation. The document comments on a number of themes, one of which is “Revitalising our town centres”. It recognises that retail and commercial centres are hubs of social and economic activity and the focal point for a diverse range of services and cultural activities/functions, which support the needs of local communities. They are highly accessible to different modes of transport and are the most sustainable locations for new development. This pivotal position in our society needs to be maximised. The planning system must respond to this situation by ensuring that our retail and commercial centres can operate as flexibly as possible. The LDPs need to set out clear visions for each centre, establishing realistic and sensible boundaries. The role and function of established shopping areas must be reassessed. It recognises the need for outside spaces and its creative use; the need to establish town centre’s as a go-to place where a variety of retail, employment, commercial, community, leisure, health and public sector uses come together in a hub of activity. Residential uses are also key to the vitality of centres, provided that they do not curtail the commercial activities which take place and soundscapes are considered. It recognises that traditional retailing uses will not be as prevalent and the demand for new retail space will be very low for the foreseeable future, therefore primary retail areas will need to be urgently reviewed. Unreasonable and inflexible policies should be challenged through the development plan process, as much more creative thinking will be needed to reimagine and re-purpose these areas.
- 3.9 **Together for Retail A Wales Retail Forum Action Plan (May 2023)** - The Plan identifies key actions against the three key pillars identified in the Shared Strategic Vision for the Retail Sector (June 2022) - People, Place, Resilience – and identifies measures to help assess the impact of these actions, their outcomes, and their effectiveness in progressing the Shared Strategic Vision. For the purposes of this Study, the most relevant actions are those related to places: Reduce vacant premises in our town centres; Increase footfall into retail premises in Wales; Reduce the overall cost of non-domestic rates for eligible businesses in the retail, hospitality and leisure sectors in 2023; Adoption of Town Centre First policy in planning, with permissions bringing forward policy aligned developments.

Local Planning Policy Context

- 3.10 The adopted **Local Development Plan (2017)** sets out a range of retail and town centre use-related policies. These are Policy SP6 – Retail; Policy MG12 – Retail Hierarchy; Policy MG13 – Edge And Out Of Town Retailing Areas; Policy MG14 -

Non-A1 Retail Uses Within Town And District Retail Centres; Policy MG15 - Non-A1 Retail Uses Within Local & Neighbourhood Retail Centres. These are discussed in detail in Section 12.

- 3.11 **Draft Retail and Town Centre Development SPG (October 2022)** provides further guidance on the application of LDP retail policies which seek to protect the vitality, attractiveness, and viability of the designated retail centres in accordance with the approach outlined in national planning policy.

Legislative Context

- 3.12 Town And Country Planning (Use Classes) Order 1987 (As Amended) identifies uses of land and buildings and places them within various categories known as use classes. The Order does not contain a definitive list of all the different types of uses of land and buildings but provides broad categories to allow developers and decision-makers to understand which use class should apply.

- 3.13 The following list gives an indication of the types of uses which would fall under the retail use classes contained under Part A Schedule 1 of the Order:

- A1 Shops - Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices (but not sorting offices), pet shops, sandwich bars, showrooms, domestic hire shops, dry cleaners and funeral directors.
- A2 Financial and professional services - Financial services such as banks and building societies, professional services (other than health and medical services) including estate and employment agencies and betting offices.
- A3 Food and drink - For the sale of food and drink for consumption on the premises - restaurants, snack bars and cafes, drinking establishments and take-aways.

- 3.14 Town And Country Planning (General Permitted Development) Order 1995 (As Amended) – sets out permitted development rights for Retail Uses. It should be noted that between 30 April 2021 and April 2022, temporary Permitted Development Rights were also in place to support businesses as a Covid-19 response. In essence, these allowed change of the above listed A Use Classes to other A Use Classes, or to B1 (business); D1 (non-residential institutions); and D2 (assembly and leisure).

- 3.15 Although these temporary changes are no longer in place, the Welsh Government ran a consultation between November 2021 and February 2022 on making them permanent. The outcome of this consultation is yet to be published¹.

¹ <https://www.gov.wales/amendments-permitted-development-rights>

4. Retail and Leisure Trends

Introduction

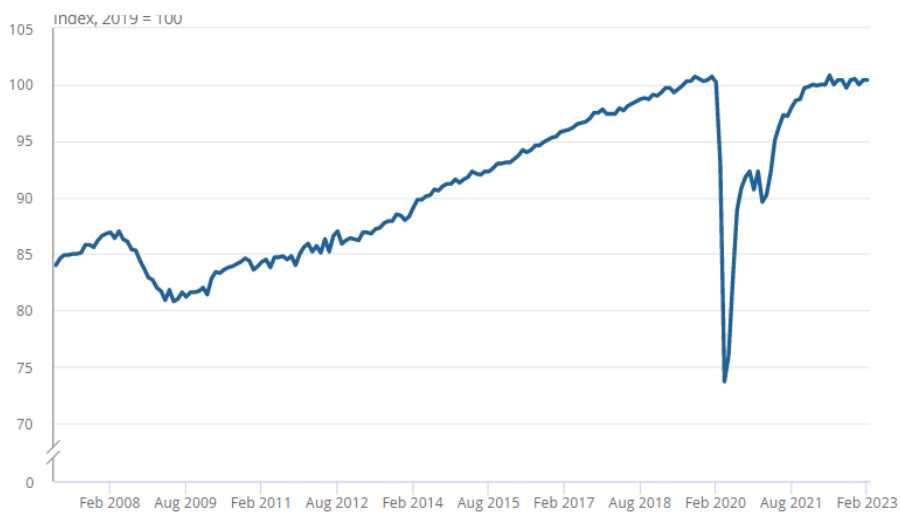
- 4.1 To provide a context for this Study, we provide an overview of current retail and leisure trends below. It should be noted that the retail and leisure sectors are dynamic, and that new retail and leisure formats continue to evolve to meet our everyday needs. The below commentary should therefore be taken as a 'snapshot'. This is particularly the case given the current commercial circumstances arising from the Covid-19 pandemic ('lockdowns' in 2020 and 2021), Brexit (January 2020) and the conflict in Ukraine (which started in February 2022).

The Current State of the UK Economy

- 4.2 In recent years the UK economy has been greatly affected by commercial circumstances arising from the Covid-19 pandemic ('lockdowns' in 2020 and 2021), Brexit (January 2020) and the conflict in Ukraine (which started in February 2022). As a result, National Statistics ('ONS') figures indicate that UK GDP has seen dramatic changes whereby GDP index fell from 100.2 in February 2020 to 73.7 in April 2020, and eventually rising back in February 2023 to pre-pandemic level of 100.4.² This is shown in the image below.

Figure 4.2.1 UK GDP is estimated to have shown no growth in February 2023

Monthly index, January 2007 to February 2023, UK



- 4.3 However, a deteriorating economic outlook – a combination of instability within UK government, soaring inflation reaching 10.1% in March 2023³ (which is comfortably outpacing average earnings growth), tax rises, weak businesses investment, and the implications of the war in Ukraine - continues to prevail and the growth outlook for the UK continues to be volatile. In September 2022 it is predicted that the next two years will be characterised by slow, or even negative GDP growth, with the UK potentially entering a recession⁴. However, in April 2023, predications indicate that the UK economy is starting to turn a corner, albeit slowly - the improved outlook is largely thanks to better-than-expected GDP in Q4 2022 and the expected rapid easing of inflationary pressures.⁵

² ONS, GDP monthly estimate, UK: February 2023

³ Banks of England, 23 March 2023

⁴ PWC, UK Economic Outlook September 2022

⁵ EY Press Release 17 April 2023

4.4 However, looking at UK regions, it is expected that in 2023 all twelve regions of the UK will contract. By the end of 2023 it is expected that there will be only two regions where economic activity exceeds pre-pandemic levels. Whilst Welsh projected GVA will remain below pre-pandemic levels by the end of 2023, it is predicted to be the third best performing region in the UK (after London and Northern Ireland).⁶

4.5 Looking specifically at Wales, it saw the second greatest level of economic growth since the financial crisis, over the period between Q1 2010 and Q4 2021. In this time, Wales saw a cumulative growth in regional gross value-added of 14.7% - that was second only to London's 35.2%, but higher than any other nation or region of the UK⁷. However, during Covid-19, Wales saw the largest decrease amongst the 12 UK regions in GDP of -11.2% between 2019 and 2020⁸. Notwithstanding, by August 2022, Welsh output (GVA) had recovered to pre-pandemic levels⁹. In general therefore, the Welsh economy has kept pace with changes in the UK economy over the medium term across a range of indicators¹⁰. However, structural weaknesses remain which can hinder Wales' future economic growth.

The Retail and Leisure Economy

4.6 The retail sector has endured a particularly difficult pandemic, with multiple lockdowns and online competition leading to the permanent closure of many shops and businesses. UK high streets have already been in continuous decline since the 2007 recession¹¹, with consumer habits moving away from the traditional high street experience. The pandemic, however, accelerated these pre-existing challenges, including creating an unprecedented rise in online shopping.

4.7 The industry leader in commercial real estate and analytics, CoStar's Retail National Report UK 2022 comments¹² as follows:

- The retail sector is in recovery mode after a difficult pandemic, when multiple lockdowns and online competition caused the permanent closure of many shops and businesses. Net absorption of retail space turned sharply negative as a result, with shopping centres and less affluent towns most severely impacted. Supermarkets and discount retailers were among the few pockets of resilience from a demand perspective.
- The lifting of pandemic restrictions has boosted both footfall and retail sales over the past year or so. This has supported a revival in leasing, with some notable deals by fashion and food and beverage retailers in recent quarters, with experiential retailers expanding too. The national retail vacancy rate has stabilised accordingly.
- Recent positivity comes with some caveats, however. High inflation and a burgeoning cost-of-living crisis have dented consumer confidence in recent months, with GfK's confidence index remaining at near record low levels in early 2023. Retail sales volumes remained 1.4% below their pre-pandemic levels in January 2023.
- Meanwhile, retail rents continue to decline, with average asking rents dropping by -1.0% over the past 12 months. Further rent losses are likely in the near term, although retail centres with a grocery anchor are well placed to outperform given recent demand trends, as could high streets in more affluent towns and suburbs that are geared more to leisure.

⁶ [PWC UK economic outlook 2023, January 2023](#)

⁷ [Nation.cymru, 05 Jun 2022](#)

⁸ [gov.wales, Regional gross domestic product and gross value added: 1998 to 2020, May 2022](#)

⁹ [NIESR, National Institute UK Economic Outlook, 2022](#)

¹⁰ [gov.wales, Welsh economy in numbers, 27 April 2023](#)

¹¹ In 2011, the Portas Review summarised the challenges for high street retailers as follows: "The phenomenal growth of online retailing, the rise of mobile retailing, the speed and sophistication of the major national and international retailers, the epic and immersive experiences offered by today's new breed of shopping mall, combined with a crippling recession, have all conspired to change today's retail landscape".

¹² CoStar's Retail National Report UK 2022, October 2022

- On the supply side, little new retail space is likely to be built in the next few years, which should offer some support to the vacancy rate. The trend of owners converting retail space to other uses is also likely to accelerate.
- UK retail investment had been recovering until Spring 2022, when falling prices and shopping centre redevelopment opportunities were luring more investors back to the sector. Momentum has eased in the past few months, however, amid concerns over rising inflation and interest rates and faltering retail sales. Pricing for retail property is likely to fall further over the next year or so.

4.8 Unsurprisingly, the latest research¹³ shows that the hospitality sector saw the biggest economic decline of all sectors during the pandemic. Periods of public health restrictions saw large falls in output. The peak of the economic downturn was in April 2020, where economic output in the food & accommodation sector was 90% below pre-pandemic levels (February 2020). Overall, hospitality economic output over 2020 was 42% lower than 2019; and in 2021, hospitality output was 21% lower than 2019. The hospitality industry's share of the UK economy fell from 3% in 2019 to 2% in 2020 and 2021. However, as all coronavirus restrictions were lifted from early 2022, the hospitality sector continues its recovery, particularly as international tourists return. It is forecast that the hospitality and leisure sectors are expected to be the fastest growing parts of the economy over the next five years. This in part reflects the large ground to be recovered following the pandemic.

4.9 To address the growing concerns associated with the High Street, in September 2021, Audit Wales prepared a report titled Regenerating Town Centres in Wales¹⁴. This report summarised the key challenges facing town centres in Wales and provides six recommendations to the Welsh Government to support the growth of local town centres and villages, which we summarise below:

- Review of non-domestic rates.
- Review of transport challenges (car parking, access to public transport and poor transport infrastructure).
- Review of funding mechanisms.
- Utilisation of training and skills.
- Clarification of practical delivery of the "Town Centre First" approach.
- LPA review of current approached to town centre regeneration.

¹³ [House of Commons Library – Research Briefing – Hospitality industry and Covid 19, 11 May 2022](#)

¹⁴ [Audit Wales, Regenerating Town Centres in Wales, September 2021](#)

Consumer Spending

- 4.10 Experian Retail Planner Briefing Note 20 (February 2023) makes a number of comments regarding consumer spending, taking into account the recent conflict in Ukraine and its wider economic impacts on the UK.
- 4.11 Squeezed household budgets due to double digit inflation and rising interest rates is underpinning a continued weakness in consumer and business confidence. Real personal disposable income is expected to decline by at least 2% in 2023 and 2024. Looking ahead this sees consumer spending falter, and there is a trend of reduced spending on non-essential items across the UK.
- 4.12 Convenience spending is likely to experience an ongoing wind down from the increased levels seen through the pandemic period, where substitute spending in restaurants was either not possible, or not demanded to the same extent given Covid 19 related fears. In the long term, growth on a per head basis settles at 0.2% per annum and spending is 4% lower than projected previously in the absence of a significant rebound once inflation subsides.
- 4.13 Comparison sales volumes are also projected to decline in 2023. Consumer confidence has been hovering around all-time lows and Bulky goods sales in particular are likely to suffer as consumers put off major purchases, such as the replacement of white goods. A projected recovery gains momentum by 2025 and in the long-term growth per head averages around 3%. However, the shortfall relative to the Retail Planner 2019 projection exceeds 10%.
- 4.14 Leisure sales fell markedly in 2020 given Covid 19 related lockdowns, recovering some of the lost ground in 2021 as restrictions eased. The latest data shows that the recovery gained momentum in the first three quarters of 2022 and for the year as a whole, sales are estimated to have come in 5% above the pre-pandemic 2019 level. In the long term, leisure spending is projected to grow at roughly half the rate of total retail spend, though three times faster than for convenience spend. Leisure floorspace continues to grow relatively strongly.

Figure 4.14.1 Experian's Identified UK retail spending (including non-store) and leisure spending¹⁵

Volume Growth Per Head (%)	2022-31	2031-40	2022-41	1997-2007	2008-11	2012-21	1997-2021
Annual averages							
Retail Spend	0.7	2.1	1.4	1.0	-0.2	1.8	1.1
Convenience goods	-0.9	0.2	-0.4	-3.0	-2.4	0.7	-1.4
Comparison goods	1.7	3.0	2.3	3.6	0.2	2.3	2.6
of which bulky	1.9	3.7	2.7	6.6	2.4	3.1	4.5
Non-bulky	1.6	2.7	2.1	0.9	-0.3	2.1	1.2
Leisure	2.7	0.8	1.8	-2.8	-3.7	-1.4	-2.4
Consumer spending	1.3	1.4	1.4	2.7	-1.2	0.7	1.3

Source: Figure 2 of Experian Retail Planner Briefing Note 20

Online Shopping

- 4.15 The rise in internet retailing has been at the forefront of retail evolution for a number of years. Covid-19 has accelerated this trend.

¹⁵ Experian, Retail Planner Briefing Note 20, February 2023

- 4.16 Generally, Experian shows that growth in non-store retail is expected to be maintained, particularly through the wider adoption of commonplace technology such as mobile phones and tablets combined with 5G and fibre networks, faster delivery times and easier returns processes to make internet shopping even more convenient. Experian expects that market share will continue to grow strongly in the mid-term, whereby in 2025, 31.0% of retail expenditure would be spent online. The pace of e-commerce growth is anticipated to moderate over the longer term, reaching 38.2 % of total retail sales by 2040¹⁶.

Figure 4.16.1 Experian's Identified and Forecast Market Share of Non-Retail Sales¹⁷

Volume Growth Per Head (%)	2022	2025	2030	2035	2040
Total	29.6	31.0	34.6	36.7	38.2
Convenience goods	19.4	20.6	23.4	24.9	25.9
Comparison goods	36.0	37.3	40.4	42.1	43.1

Source: Figure 5 of Experian Retail Planner Briefing Note 20

Omni-Channel Retail

- 4.17 The ongoing popularity of internet shopping continues to have clear implications in respect of the viability of some 'bricks and mortar' retailers. However, this does not mean that physical retail is to become obsolete.
- 4.18 Omni-channel retail (or omni-channel commerce) is increasingly becoming the norm across the industry. This is a multichannel approach to sales that focuses on providing a seamless customer experience whether the client is shopping online or in a brick-and-mortar store. For example, many stores sell online but fulfil orders from regular stores rather than warehouses¹⁸. Such purchases, therefore, help to sustain tangible retail floorspace.
- 4.19 Specifically looking at Wales, a report by Barclays Corporate Banking, indicates that click and collect shopping was worth £1.4bn in Wales in 2022¹⁹. In essence, goods that are bought online but picked up from a physical store, now accounts for 31% of sales for retailers who offer the service in Wales²⁰. This report therefore shows how online, and retail sales channels are becoming more intertwined.
- 4.20 The acceleration in consumer behaviour change in 2020 has made an omni-channel strategy more important than ever. In research conducted by BigCommerce and Retail Dive in 2020, 46% of retail executives said they planned to increase their investment in omni-channel retailing moving forward, a move away from their plans prior to COVID-19²¹.
- 4.21 When it comes to shopping in physical stores, 2021 research by Klarna²² (an provider of online financial services) highlights that physical retail is still an important channel even for digital-savvy shoppers: Shoppers are nearly twice as likely to value seeing and feeling items they're buying in real life (88% Klarna shoppers); meanwhile, half (49%) of shoppers value being able to visit showrooms and see items in store but pay online.

¹⁶ Experian, Retail Planner Briefing Note 20, February 2023

¹⁷ Experian, Retail Planner Briefing Note 20, February 2023

¹⁸ This is particularly the case with food shopping and speciality comparison goods purchases, where retailers often try to tap into a wider market through an online presence.

¹⁹ [Business News Wales, Click-and-Collect Economy Worth Over £1.44bn in Wales as 'Hybrid' Shopping Grows, October 2022](#)

²⁰ [Business News Wales, Click-and-Collect Economy Worth Over £1.44bn in Wales as 'Hybrid' Shopping Grows, October 2022](#)

²¹ bigcommerce.co.uk

²² [Internet Retailing, 13 October 2021](#)

Conclusion

- 4.22 The retail market has experienced significant changes in recent years and the prevailing retail environment continues to be somewhat unstable. In response to this unpredictability, those operating in the market are forced to adapt quickly or otherwise face falling profits.
- 4.23 In a market disrupted by continued changes in consumer behaviour, investing in the consumer experience is anticipated to be the key to success in securing resiliency in retail stores moving forward. Planning policy can play an important role in helping to future-proof city, town and village centres against the ongoing uncertainty, and we come back to this issue in Section 12.

5. Market Shares and Capacity Assessment

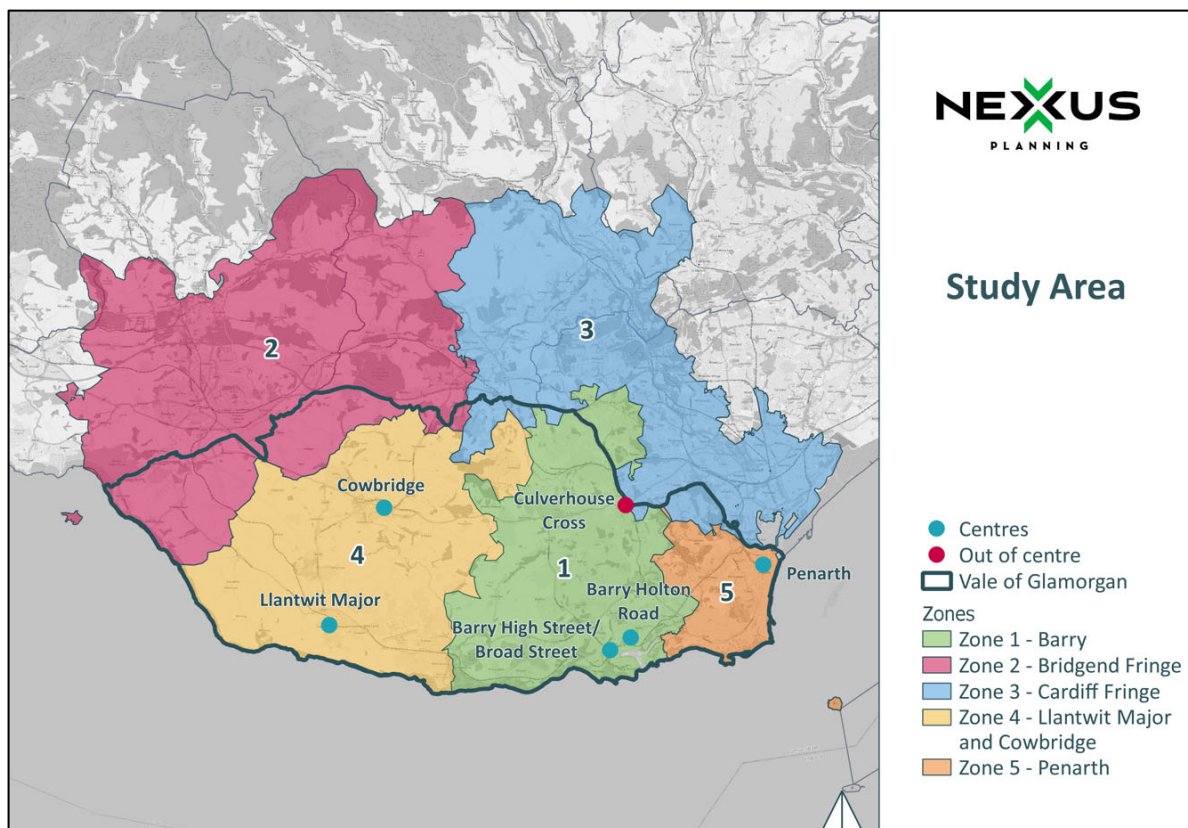
Introduction

- 5.1 This section defines the Study Area and describes the Household Survey undertaken to inform this Study. It summarises the key findings on internet shopping patterns, as well as a survey-derived market share analysis for convenience and comparison goods spending at ‘bricks and mortar’ locations. We also examine the level of take-up for various leisure activities and examine any locally identified deficiencies in provision.
- 5.2 As part of this analysis, we set out the results of our quantitative capacity assessment for new retail (comparison and convenience goods) and leisure floorspace in the Council area, covering the period from 2023 to 2036.

Study Area & Household Telephone Surveys

- 5.3 It is important to identify a Study Area that covers the key area of interest. It is usually the area within which you would expect the resident population of the Council area to carry out the majority of its retail spending. The Study Area is shown on the plan in the figure below, and at **Appendix A**. The Study Area consists of five Zones. This is broadly in keeping with the Council’s previous Retail Study, and thereby allows for direct comparisons over time. The Study Area and its zones are defined by postal sector geography. For the purposes of the Study, Zones 1, 4 and 5 are referred to as the ‘Inner Study Area’, and broadly reflect the Council area boundary.

Figure 5.3.1 Study Area



Source: Appendix A

- 5.4 The Study Area has been the subject of a household telephone survey undertaken by NEMS Market Research. Household Surveys are widely recognised across the retail and leisure industry, and within TAN 4 guidance, as an excellent means of understanding where people within a specified area carry out their retail and leisure expenditure. The purpose of the Study Area Household Survey is to inform our quantitative analysis of the turnover of specific retailers, towns and other destinations, as well as its qualitative findings on attitudes and perceptions of different centres.
- 5.5 The Study Area Household Survey comprised 502 interviews, with the sample size being a reasonable representation of the Study Area’s population. The sample size is split between the five Zones and is based on population ratios in order to obtain accurate data. A full description of the research methodology, sampling size, weightings and sample profiles is contained at the beginning of the NEMS report in **Appendix B**. NEMS quote their work as being within a 95% confidence range.
- 5.6 The figure below sets out the postcode sectors which comprise each Zone.

Figure 5.6.1 Study Area Postal Sectors and Number of Interviews

Zone	Postal Sectors	Household Survey Interviews
1	CF5 6, CF62 3, CF62 5, CF62 6, CF62 7, CF62 8, CF62 9, CF63 1, CF63 2, CF63 3, CF63 4	97
2	CF31 1, CF31 2, CF31 3, CF31 4, CF31 5, CF32 0, CF32 9, CF35 5, CF35 6, CF39 8, CF72 9	103
3	CF5 1, CF5 2, CF5 3, CF5 4, CF10 1, CF10 2, CF10 3, CF10 4, CF10 5, CF11 0, CF11 6, CF11 7, CF11 9, CF14 1, CF14 2, CF14 7, CF15 7, CF15 8, CF15 9, CF23 5, CF24 0, CF24 1, CF24 2, CF24 3, CF24 4, CF24 5, CF37 1, CF37 5, CF38 1, CF38 2, CF72 8, CF83 2, CF5 5, CF11 8	100
4	CF61 1, CF61 2, CF62 4, CF71 7	101
5	CF64 1, CF64 2, CF64 3, CF64 4, CF64 5	101
Study Area Total		502

Source: Appendix B

Study Area Population

- 5.7 Population data for Zones 1, 4 and 5 (Inner Study Area) is sourced from Experian MMG3²³ data (2021 report). The 2023 figures are projected forward to 2036 on a pro-rata basis reflecting the Council’s latest forecasts, namely Council data derived from Edge Analytics dwelling led scenario (10-year average completions), which forecasts population growth up to 2036. In relation to Zones 2 and 3 (the Outer Study Area), the population data for all years is sourced from Experian MMG3 data (2021 report).

²³ MMG3 - MicromarketerG3 is Experian’s geographical analysis software which is the industry-recognised source for population projections and expenditure data.

Figure 5.7.1 Population Projections

Zone	Population				Population Growth
	2023	2026	2031	2036	2023-2036
Zone 1 – Barry	69,968	71,212	72,925	74,443	6.4%
Zone 2 – Bridgend Fringe	119,247	120,701	122,868	124,982	4.8%
Zone 3 – Cardiff Fringe	306,961	310,152	315,350	318,876	3.9%
Zone 4 – Llantwit Major and Cowbridge	26,229	26,670	27,215	27,705	5.6%
Zone 5 – Penarth	38,356	38,889	39,689	40,298	5.1%
Inner Study Area	134,553	136,771	139,829	142,446	5.9%
Total	560,761	567,624	578,047	586,304	4.6%

Source: Appendix C

Non-Store Retailing or Special Forms of Trading

- 5.8 Special forms of trading (SFT) are defined by Experian as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies. For the reasons we have set out in Section 4, it is vital to take account of the proportion of spending which is carried out in these sectors, as it has a significant impact on the capacity for existing and proposed ‘bricks and mortar’ floorspace.

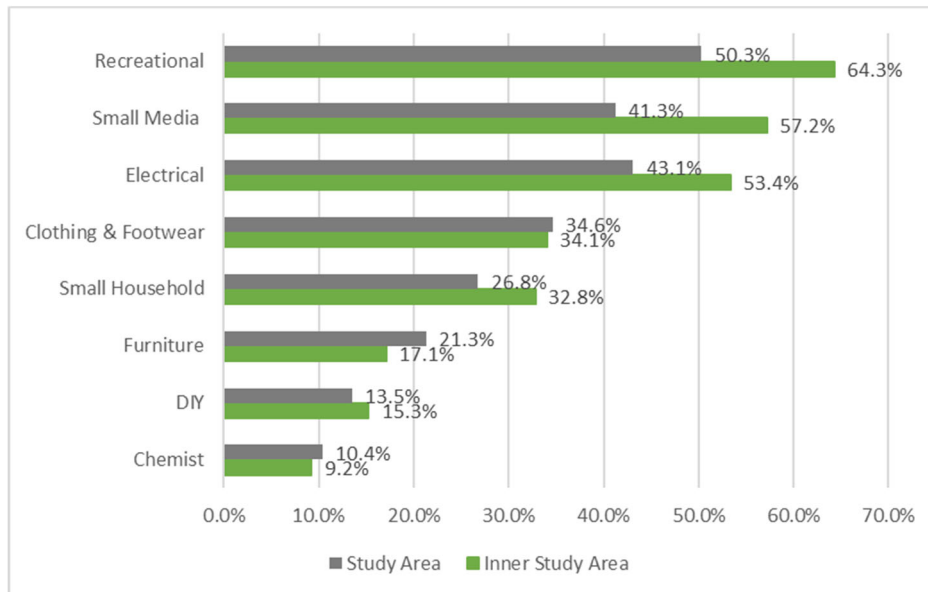
Convenience Goods Online Shopping

- 5.9 The household survey asked residents of the Study Area where they normally undertake their main food and grocery shopping.
- 5.10 Across the whole Study Area, 8.2% of respondents usually shop online for their main food shop (Question 1 of the Household Survey). Looking at the Inner Study Area (Zones 1, 4 and 5), the average figure is circa 10.2%. As set out in Section 4, the UK average for online convenience shopping in 2023 is 18.6%. As such, the take-up of online convenience shopping in the Study Area as a whole, and in the Inner Study Area, is considerably lower than the UK average. This is likely to be because of the availability of a wide range of readily accessible bricks and mortar food stores meaning that there is a lower dependence on online shopping.

Comparison Goods Online Shopping

- 5.11 The household survey also asked where respondents usually shop for different types of comparison goods. The findings presented in the figure below show that the take-up for online shopping varies across the categories. On average, within the Study Area, 30.2% of respondents shop online for comparison goods, compared to a UK average of 35.4%. In keeping with convenience goods, there is therefore a lower propensity to shop for comparison goods online in the Study Area, than across the UK as a whole. However, when considering the Inner Study Area only, 35.4% of respondents shop online for comparison goods, which is on par with the UK average of 35.4%.

Figure 5.11.1 Online Comparison Goods Spending in the Study Area



Source: Appendix C

Retail Expenditure Forecasts

- 5.12 Retail expenditure data has been sourced from our in-house Experian MMG3 software. We obtain separate data for convenience and comparison goods, which in turn is broken down into multiple goods categories, as set out in our full statistical assessment in **Appendix C**.
- 5.13 The data takes account of the socio-economic characteristics of the local population to provide local consumer expenditure calculations. Experian is a robust source of population and expenditure data that is widely used for calculating retail capacity across the industry.
- 5.14 Expenditure data from Experian is provided per capita in 2020 prices, as is every subsequent monetary value. Using the growth rates presented in Figure 7 of Experian Retail Planner Briefing Note 20 (February 2023), which are reproduced in the table below, the per capita expenditure is then projected forward to the base year (2023) and the relevant assessment years. Adjustments are made at every step to account for the growth in special forms of trading (SFT).
- 5.15 There are two elements that should be noted here:
- Experian notes that long-term forecasts should be treated with caution, and that they should be subject to regular reviews given the wide range of factors that can influence the broader national economy. Experian produces annual updates to reflect this, and as we go on to discuss in our recommendations later in the report, we would advise that some of the expenditure data inputs to this report be re-visited in another 12 -24 months in recognition of the exceptionally turbulent economic times surrounding both Covid-19 and Brexit, the full implications of which have yet to be realised at the time of writing.
 - Experian Retail Planner Briefing Note 20 (February 2023) provides estimated year-on-year forecasts of internet and other SFT, which allows us to 'strip out' any expenditure that is, either now or in the future, diverted to SFT. This ensures that the increasing propensity to shop by SFT is accounted for in our modelling. These increasing deductions for SFT have the effect of off-setting some of the growth in expenditure in the Study Area derived from population

increases. Furthermore, many brands offer online sales, but source the goods from their own stores' shelves. This is often the case for foodstores where employees will pick online orders from stores' shelves before, during or after opening hours. These orders are then delivered by dedicated vans from each store and as such, the online expenditure is attributed to tangible stores. Experian provides 'adjusted' figures to account for this.

Figure 5.15.1 'Adjusted' Special Forms of Trading Market Share Forecasts

Year	Convenience growth rates (%)	Comparison growth rates (%)
2021	-2.3	6.0
2022	-6.8	2.0
2023	-2.2	-1.0
2024	-0.7	-0.8
2025	-0.3	0.3
2026	-0.2	1.6
2027	-0.1	2.2
2028	-0.1	2.4
2029	0	2.5
2030	0	2.6
2031	0	2.6
2032	0	2.7
2033	0.1	2.7
2034	0.1	2.7
2035	0.1	2.8
2036	0.1	2.8

Source: Figure 7, Experian Retail Planner Briefing Note 20, February 2023

- 5.16 The expenditure per capita figures are then multiplied by the population of each zone at each of the assessment years. The figure below sets out the resultant outcome of the total 'brick and mortar' comparison and convenience expenditure in the Study Area at the base and assessment years.

Figure 5.16.1 Retail Expenditure Forecasts in the Study Area (£m)

	2023	2026	2031	2036	Growth 2023-2036
Convenience	£1,280.1	£1,280.3	£1,301.3	£1,325.2	3.5%
Comparison	£2,285.7	£2,339.0	£2,689.9	£3,123.4	36.7%

Source: Tables 1b & 8b, Appendix C

Convenience Goods Findings

Market Shares

- 5.17 Before considering the capacity for new convenience goods floorspace, we firstly examine the overall convenience goods spending by residents of the Study Area. The figure shows where Study Area residents are spending their money.
- 5.18 The results show that destinations in the Council area account for 27.0% (£346.0m) of the spending of all Study Area residents in 2023. The remaining 73.0% (£934.1 m) of spending carried out by residents of the Study Area takes place at destinations beyond the Council area.

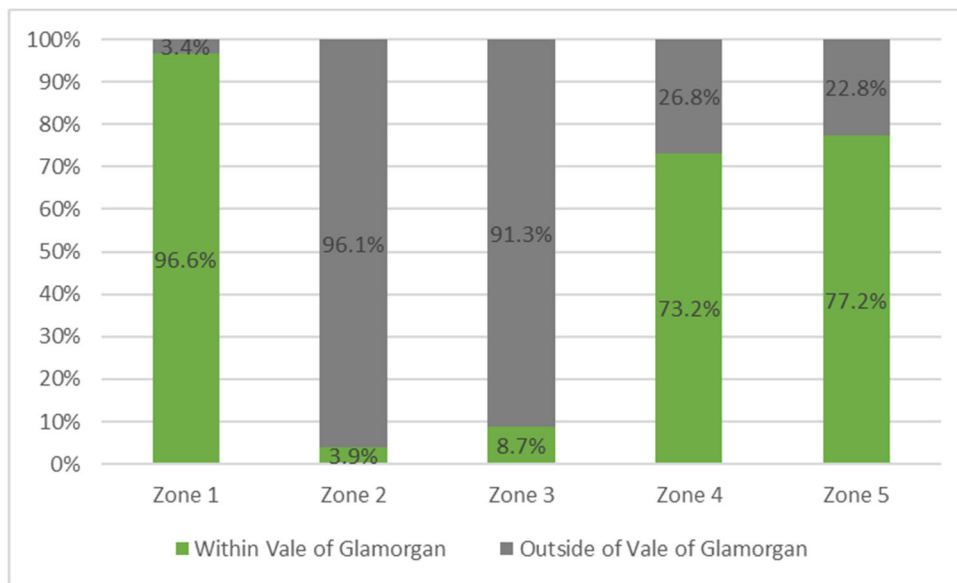
- 5.19 Looking at the Inner Study Area in isolation (Zones 1, 4 and 5 only), a healthy 86.1% (£275.7m) of expenditure is 'retained' within the Council area; with only 13.9% (£44.6 m) spent outside the Council area. 17.0% of expenditure in the Inner Study Area goes to the range of designated centres within Vale of Glamorgan, and Cowbridge district centre (8.3%) has the strongest pull. However, the majority of convenience goods spending, some 69.1% of all convenience goods spending, is directed towards out-of-centre destinations. Barry's out-of-centre stores dominate with a cumulative 43.0%. Of these, Asda at Ffordd Y Mileniwm (12.8%) and Morrisons at Penny Way (11.7%) attract the greatest market shares. These stores are also the most popular standalone food stores within the Council area. Culverhouse Cross (which hosts Tesco Extra, Aldi and M&S) draws 17.4% of convenience goods trade from the Inner Study Area.
- 5.20 Overall, the market share assessment indicates that the Vale of Glamorgan provides well for its own residential population in terms of convenience goods spending. A retention figure of 86.1% is a healthy indicator. However, it is evident that out-of-centre destinations dominate convenience shopping, thus creating heavy competition for the designated centres.
- 5.21 The Vale attracts 27.0% (£346.0m) of convenience goods expenditure from the study area as a whole.

Figure 5.21.1 Convenience Goods Market Share by Destination

Destination	Inner Study Area		Whole Study Area	
	(%)	(£m)	(%)	(£m)
Vale of Glamorgan	86.1%	£275.7	27.0%	£346.0
In Centre	17.0%	£54.5	5.2%	£66.3
Barry - High Street / Broad Street	0.5%	£1.8	0.1%	£1.8
Barry High Street / Broad Street - Other	0.5%	£1.8	0.1%	£1.8
Barry - Holton Road	2.2%	£7.1	0.6%	£7.1
Barry Holton Road - Other	2.2%	£7.1	0.6%	£7.1
Penarth	1.6%	£5.1	0.5%	£5.9
Penarth - Other	1.6%	£5.1	0.5%	£5.9
Cowbridge	8.3%	£26.6	2.9%	£36.7
Waitrose, Birds Lane	7.4%	£23.7	2.6%	£33.8
Cowbridge - Other	0.9%	£2.9	0.2%	£2.9
Llantwit Major	2.7%	£8.8	0.8%	£9.6
Llantwit Major - Other	2.7%	£8.8	0.8%	£9.6
Local and Neighbourhood Centres	1.6%	£5.2	0.4%	£5.2
LC Barry Road	0.0%	£0.0	0.0%	£0.0
LC Cardiff Road Dinas Powys	0.1%	£0.4	0.0%	£0.4
LC Cornerswell Road	0.1%	£0.2	0.0%	£0.2
LC Dinas Powys Village	0.0%	£0.0	0.0%	£0.0
LC Fontygary Road Rhoose	0.1%	£0.2	0.0%	£0.2
LC Main Street Cadoxton	0.6%	£2.0	0.2%	£2.0
LC The Square St Athan	0.1%	£0.2	0.0%	£0.2
NC Castle Court - The Parade Dinas Powys	0.7%	£2.1	0.2%	£2.1
Out of Centre	69.1%	£221.2	21.9%	£279.7
OoC - Barry - Asda, Ffordd Y Mileniwm	12.8%	£41.1	3.2%	£41.1
OoC - Barry - Morrisons Superstore, Penny Way	11.7%	£37.6	2.9%	£37.6
OoC - Barry - Lidl, Cennin Pedr	7.2%	£22.9	1.8%	£22.9
OoC - Barry - Other	3.3%	£10.5	0.8%	£10.5
OoC - Barry - Tesco Superstore, Stirling Road	8.1%	£25.8	2.0%	£25.8
OoC - Culverhouse Cross - M&S Food Hall	7.4%	£23.7	2.1%	£27.3
OoC - Culverhouse Cross - Tesco Extra	6.5%	£20.8	4.2%	£53.3
OoC - Culverhouse Cross - Aldi	3.5%	£11.1	2.3%	£29.5
OoC - Penarth - Tesco Superstore, Terra Nova Way	6.9%	£22.1	1.9%	£24.7
OoC - Penarth	0.4%	£1.3	0.1%	£1.3
OoC - Other	1.3%	£4.3	0.4%	£5.7
Outside of Vale of Glamorgan	13.9%	£44.6	73.0%	£934.1
Aberkenfig/ Sarn	0.0%	£0.0	1.2%	£15.9
Bridgend	5.5%	£17.7	12.4%	£159.2
Caerphilly	0.0%	£0.0	3.7%	£48.0
Cardiff	7.8%	£25.0	36.4%	£466.4
Pontyclun / Talbot Green	0.4%	£1.1	8.7%	£110.9
Pontypridd	0.0%	£0.0	6.1%	£77.8
Total	100.0%	£320.3	100.0%	£1,280.1

5.22 Importantly, we can also examine the destination of convenience goods spend within each Zone of the Study Area. The figure below assesses the amount of convenience goods spending carried out in the Council area by residents of each Zone. The results show that there are relatively healthy levels of retention in Zones 1, 4 and 5 (i.e. Inner Study Area), however, the difference between the individual zones is apparent. Zone 1 (Barry area) retains 96.6% of its residents' convenience goods spending. However, Zones 4 (Llantwit and Cowbridge area) and 5 (Penarth area) retain a lesser amount of 73.2% and 77.2% of their residents spending respectively. In terms of leakage, residents of Zone 4 notably favour Bridgend (24.0%), whilst residents of Zone 5 favour Cardiff (20.6%).

Figure 5.22.1 Convenience Goods Market Share by Zone



Source: Appendix C

5.23 Turning then to consider the flows of trade from Zones 2 and 3, it is notable that there is relatively little 'inflow' to the Vale of Glamorgan Council area. This is likely to be a result of the relative geographic location of these Zones and the availability of convenience shopping alternatives nearer to home – indeed it would be unusual for significant amounts of convenience goods (especially fresh and frozen goods) to be commuted lengthy journeys.

5.24 Moving on to consider to individual retail destinations, where national company averages for convenience sales are available for benchmarking purposes (see Table 5 of Appendix C), we are able to compare local turnover to the turnover of an average store of that size in order to identify where facilities may be trading above or below business expectations. This is summarised in the table below, and includes assumptions for a small inflow of trade from residents beyond the Study Area (e.g. such as day visitors or tourists).

Figure 5.24.1 Convenience Benchmarking

Destination	Benchmark Turnover (£m)	Survey Turnover (With 2% Inflow from Beyond Study Area (£m))	Trading Position against Benchmark (£m)	Trading Position against Benchmark (%)
Within Vale of Glamorgan	£279.0	£352.9	£73.9	26.5%
In-Centre	£48.2	£67.6	£19.4	40.2%
Out of Centre	£230.7	£285.3	£54.6	23.6%

5.25 The results show that the convenience floorspace in Vale of Glamorgan Council area is, on average, performing 26.5% above benchmark when considered cumulatively. Convenience goods facilities in designated centres within the Council area perform 40.2% above the benchmark (albeit this is driven solely by the Waitrose store in Cowbridge as the only centre with a medium/large size supermarket). Out-of-centre destinations are performing 23.6% benchmark when considered cumulatively.

5.26 The table below sets out standalone stores in order of the largest convenience performances above benchmark trading.

Figure 5.26.1 Best and Worst Performance Benchmarking – Convenience Goods

Destination	Benchmark Turnover (£m)	Survey Turnover (with 2% Inflow from Beyond Study Area (£m))	Trading Position against Benchmark (£m)
OoC - Barry - Lidl, Cennin Pedr	£8.8	£23.4	165.9%
OoC - Culverhouse Cross - Aldi	£12.3	£30.1	144.2%
Cowbridge TC - Waitrose, Birds Lane	£15.1	£34.5	127.9%
OoC - Culverhouse Cross - M&S Food Hall	£14.8	£27.9	88.6%
OoC - Barry - Asda, Ffordd Y Mileniwm	£29.9	£41.9	40.1%
OoC - Culverhouse Cross - Tesco Extra	£57.2	£54.3	-5.1%
OoC - Barry - Morrisons Superstore, Penny Way	£37.4	£38.3	2.5%
OoC - Barry - Tesco Superstore, Stirling Road	£26.9	£26.3	-2.1%
OoC - Penarth - Tesco Superstore, Terra Nova Way	£25.6	£25.2	-1.5%

Source: Table 5, Appendix C

Convenience Goods Capacity

5.27 One of the key aims of this Study is to provide recommendations on the capacity for new retail floorspace over the plan period to 2036. The use of long-term projections should be treated with caution and reviewed regularly in order to test the accuracy of the forecasts against emerging datasets. External, national and international factors can influence the wider performance of the economy, which can have trickle-down effects on local shopping patterns. As discussed in Section 4, one such example has been the economic implications of the United Kingdom leaving the European Union and the social distancing and lockdown measures necessitated by the current Covid-19 pandemic, as well the war in Ukraine.

5.28 Importantly, we also note that any quantitative retail capacity that we may identify across the Study Area does not necessarily equate to need for new retail floorspace in itself (especially in out-of-centre locations), and any such development would be required to be assessed in line with TAN4 policy in terms of impacts on the vitality and viability of town centres, the potential to prejudice emerging town centre developments, and the 'town centre first' sequential

approach to site selection. Equally, the converse also applies and a lack of identified capacity should not specifically rule out retail developments, where other material factors support such development.

- 5.29 Detailed quantitative retail capacity tables are enclosed at **Appendix C**.
- 5.30 Retail capacity modelling follows a consistent, robust methodology which incorporates a number of datasets and informed assumptions which we describe further below, but broadly speaking:

$$\text{Available Expenditure (£m)} - \text{Turnover of Existing \& Proposed (£m)} = \text{Surplus or Deficit (£m)}$$

- 5.31 Experian MMG3 census software is used to provide localised expenditure per capita per annum for various forms of retail spending. These figures are then projected forwards based on population growth, changes in expenditure over time and Special Forms of Trading (SFT), such as internet shopping.
- 5.32 As we have explored above, the turnover of existing retailers across the Study Area is calculated based on average sales densities, or turnover per square metre (i.e. the 'benchmark'). This is then contrast to the turnover of each destination derived from the household survey results.
- 5.33 The derived surplus or deficit between benchmark and survey results then equates to a cumulative under or over-trading position. If the total turnover is greater than the available expenditure, then the model would identify an oversupply of existing retail floorspace, whilst a surplus of expenditure would suggest capacity for additional retail floorspace.
- 5.34 Once the surplus or deficit of expenditure is calculated, it is then presented in floorspace figures (using average sales density assumptions) in order to demonstrate the findings within a 'real world' context. Often, surplus figures are presented under a number of different scenarios representing various retailers. For example, discount retailers (such as Aldi and Lidl amongst others) continue to operate at a lower sales density than the traditional 'big 4' (Sainsbury's, Tesco, Asda, and Morrisons²⁴). Given the same available 'pot of expenditure', a higher sales density would result in a lower floorspace capacity than a lower sales density, which would result in a higher floorspace capacity.
- 5.35 Turning now to our detailed findings for Vale of Glamorgan, as detailed above, the household survey results show that facilities within the Council have a 27.0% convenience goods market share of all spending carried out by residents of the whole Study Area.
- 5.36 In keeping with standard retail study methodology, when assessing the capacity for new convenience retail floorspace, we adopt a constant market share, in line with findings of the latest household survey (i.e. that stores within the Council Area will continue to draw 27.0% of all convenience goods spending from the Study Area). We consider that maintaining a constant market share provides a sensible basis for analysis given the relative lack of planned developments across the Study Area. In coming to this view, we have analysed the level of commitments identified through correspondence with Council officers.
- 5.37 Based on a constant market share, we then allow for growth in retail expenditure over the period to 2036, as well as utilising data provided within the latest Experian Retail Planner Briefing Note 20, in order to take account of forecast growth in retail efficiencies (for example, through the adoption of new technologies and more efficient use of available floorspace). Floorspace efficiencies are estimated to have a greater impact on comparison retailers than convenience retailers over the plan period as the rise of food discounting and disruptions to logistics continue to subdue projected efficiencies in turnover of existing convenience retail floorspace.

²⁴ Though we note that Lidl has recently overtaken Morrisons as the UK's fourth largest food retailer.

5.38 We go on to make a number of statistical assumptions through the quantitative capacity exercise in order to account for the following variables. These are contained at Tables 6a-6c of Appendix C and can be summarised as:

- Utilising a ‘goods based’ approach, we strip out expenditure for non-food comparison goods such as clothing, household goods, CDs, DVDs and other media that are now commonly sold at major food stores so that only the convenience goods floorspace is being considered (i.e. on a like-for-like basis with available convenience expenditure). These deductions are made in line with floorspace figures sourced from publicly available databases or, where data is not available, Nexus’ professional judgement based on site visits.
- We also make assumptions as to the gross to net convenience goods sales floorspace of each store, again utilising online planning records where available, national rates databases or Nexus’ professional judgement.
- Finally, we consider whether food stores are likely to attract any additional ‘inflow’ from outside of the Study Area. In this instance, we have included an assumption that all stores in the Council area will experience a 2% inflow from beyond the Study Area, based on the results of the NEMS survey and our professional judgement.

5.39 Based on the household survey, convenience retailers’ turnover within the Council area is estimated to be £352.9m at 2023. This is projected to increase to £365.3 in 2036 (see Table 6b of Appendix C). This represents a 3.5% growth – the limited growth is a factor of the negative convenience expenditure growth rates forecast by Experian, alongside relatively slow population growth across the Council Area.

5.40 Set against these expenditure forecasts, we deduct for extant convenience goods commitments. These are set out in Table 6d of Appendix C. This includes any developments that have not been built, are currently under construction, or have opened or would not have been operating at the time of the household survey. We do not take into account proposed allocations for retail floorspace. In total, these committed developments equate to a net of 1,035 sq m of convenience goods floorspace and an estimated turnover of £8.3m at 2023 (see Table 6d at Appendix C). The commitments are then projected forwards and deducted from the gross surplus expenditure.

5.41 Having deducted for extant commitments, we then contrast the pots of available convenience goods expenditure with the benchmark performance of existing facilities at each date. The table below sets out the resultant available convenience goods expenditure at each assessment date.

Figure 5.41.1 Gross Convenience Goods Surplus Expenditure in the Council Area

Year	Survey Derived Turnover (with Inflow) (£m):	Total Forecast "Benchmark" Turnover (£m)	(Gross) Available Expenditure before commitments (£m)	Turnover of all committed floorspace (£m)	(Net) Surplus Expenditure (£m)
2026	£353.0	£297.1	£55.9	£8.8	£47.0
2031	£358.7	£298.0	£60.7	£8.8	£51.9
2036	£365.3	£298.0	£67.3	£8.8	£58.5

Source: Table 7a, Appendix C

5.42 Using average sales densities to calculate a minimum floorspace scenario (a large supermarket operator) and a maximum floorspace scenario (a combination of discount food stores operators), we go on to calculate the net additional

convenience goods capacity for the Council area – see the figure below. Overall, the quantitative convenience floorspace capacity for the Council area as a whole is calculated to be between 4,282 sq m and 5,862 sq m net in 2036.

- 5.43 We have already noted above that the Study Area is affected by the negative convenience expenditure growth rates forecast by Experian, alongside relatively slow population growth – these factors would typically suggest a negative capacity for convenience floorspace. However, the identified positive capacity is primarily due to the identified overtrade of existing larger national supermarket operators (namely Tesco, Sainsbury, Asda, Morrisons, Waitrose, M&S, Aldi and Lidl) within the Council area, who are cumulatively overtrading (by 26.5%) compared to company-averages.

Figure 5.43.1 Net quantitative 'capacity' for new convenience goods in the Council area

Year	Surplus Expenditure (£m)	Total Capacity in the Council Area (sq m net)		
2026	£47.0	3,454	to	4,729
2031	£51.9	3,799	to	5,201
2036	£58.5	4,282	to	5,862

Source: Table 7a, Appendix C

- 5.44 We explore the implications of this capacity for convenience floorspace in Section 12.

Comparison Goods Findings

Market Shares

- 5.45 Turning to consider comparison goods, we examine market shares across the range of categories defined by Experian. These eight categories cover all ranges of bulky and non-bulky items. The full results of our market shares analysis are set out in Tables 8-19 of **Appendix C**.
- 5.46 To begin with, we look at the overall comparison goods spending by residents across the Study Area. The results show that destinations in the Council Area account for 18.6% (£422.3m) of the spending of all Study Area residents in 2023. The spending within the Council area is split between out-of-centre locations attracting 12.8% of the spend, and in-centre (5.6%). 81.5% of all expenditure in the Study Area is directed to destinations outside of the Council Area.
- 5.47 Looking at the Inner Study Area in isolation, which broadly equates to the Council area boundary (Zones 1, 4 and 5), destinations in the Council area account for 50.3% of the spending of Inner Study Area residents at 2023. The majority of this spending is carried out in out-of-centre locations which draw 30.4% of trade, with the biggest attraction being Culverhouse Cross (VoG side) (17.6%)²⁵, followed by a combination of out-of-centre destinations in Barry (11.6%). Designated centres draw 19.8% of trade, with the most popular centres for comparison shopping being Barry Holton Road (8.3%) and Penarth (6.3%). 49.7% of all comparison goods expenditure in the Inner Study Area is directed to destinations outside of the Council Area, with the most popular destinations being Cardiff (32.1%) and Bridgend (7.8%).

²⁵ It should also be noted that Culverhouse Cross (Cardiff side) attracts an additional 3.7% from the Inner Study Area.

Figure 5.47.1 - Comparison Goods Market Share, by Destination

Destination	Inner Study Area (£m)	Inner Study Area (%)	Total Study Area (£m)	Total Study Area (%)
Vale of Glamorgan	294.5	50.3%	£422.3	18.5%
In Centre	116.2	19.8%	£128.6	5.6%
Barry Holton Road	48.4	8.3%	£48.4	2.1%
Cowbridge	19.1	3.3%	£21.9	1.0%
Llantwit Major	8.7	1.5%	£15.4	0.7%
Penarth	36.9	6.3%	£39.8	1.7%
Local Centres	3.1	0.5%	£3.1	0.1%
LC Cornerswell Road Penarth	0.1	0.0%	£0.1	0.0%
LC Dinas Powys Village	1.3	0.2%	£1.3	0.1%
LC Fontygary Road Rhoose	1.2	0.2%	£1.2	0.1%
LC Main Street Cadoxton	0.2	0.0%	£0.2	0.0%
LC Park Crescent Barry	0.1	0.0%	£0.1	0.0%
LC The Square St Athan	0.1	0.0%	£0.1	0.0%
Out of Centre	178.3	30.4%	£293.7	12.8%
Culverhouse Cross	103.4	17.6%	£214.6	9.4%
OoC - Barry Waterfront Retail Park	19.7	3.4%	£20.1	0.9%
OoC - Barry Ty Verlon Industrial Estate	13.4	2.3%	£13.4	0.6%
OoC - Barry Briscoombe Retail Park	0.4	0.1%	£0.4	0.0%
OoC - Barry Other	34.6	5.9%	£34.6	1.5%
OoC - Penarth	0.2	0.0%	£0.2	0.0%
OoC - Other	6.5	1.1%	£10.3	0.5%
Outside of VoG	291.4	49.7%	£1,863.5	81.5%
Bridgend	45.8	7.8%	£269.1	11.8%
Caerphilly	1.3	0.2%	£80.2	3.5%
Cardiff	188.4	32.1%	£1,017.5	44.5%
Culverhouse Cross (North Side - Cardiff)	21.8	3.7%	£47.1	2.1%
Pontyclun / Talbot Green	17.6	3.0%	£234.5	10.3%
Pontypridd	1.3	0.2%	£106.4	4.7%
Outside of VoG - Other	15.2	2.6%	£108.8	4.8%
TOTAL	586.0	100.0%	£2,285.8	100.0%

Source: Table 17a and b Appendix C

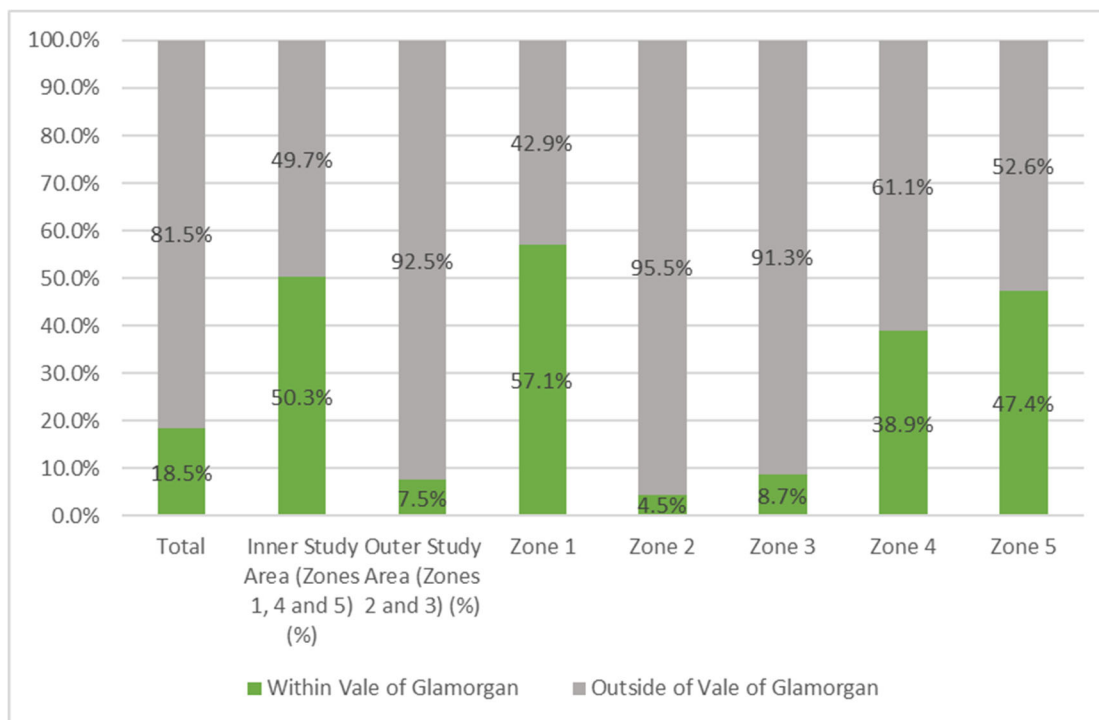
5.48 We also examine the location of comparison goods spending within each Zone. The figure below examines the amount of comparison goods spending carried out inside and outside the Council area. Looking at the Inner Study Area,

- 57.1% of residents in Zone 1 (Barry area) carry out their comparison goods shopping in the Council Area, favouring Barry Holton Road TC (20.5%), out-of-centre destinations in Barry (18.8%) and Culverhouse Cross (VoG side) (16.3%). Destinations in Cardiff are the main competitor with a 28.0% draw.
- Residents of Zones 4 (Llantwit Major and Cowbridge area) and 5 (Penarth area) favour destinations outside of the Council Area. This is not surprising given the geographical positioning of each relative to larger centres, and the nature and scale of the comparison goods offer in each centre.

- Residents of Zone 4 (Llantwit Major and Cowbridge area) favour Cardiff (23.9%) and Bridgend (26.2%); followed by Culverhouse Cross (VoG side) (10.4%) and only the Cowbridge and Llantwit Major town centres (9.5% and 7.0% respectively).
- Residents of Zone 5 (Penarth area) favour Cardiff (44.4%), followed by Culverhouse Cross (VoG side) (24.8%) and then Penarth town centre (15.5%).

5.49 The inflow of trade from the Outer Study Area averages around 7.5% of all spending, with Cardiff, Bridgend and Pontyclun / Talbot Green being the top alternative destinations.

Figure 5.49.1 Comparison Goods Market Share by Zone

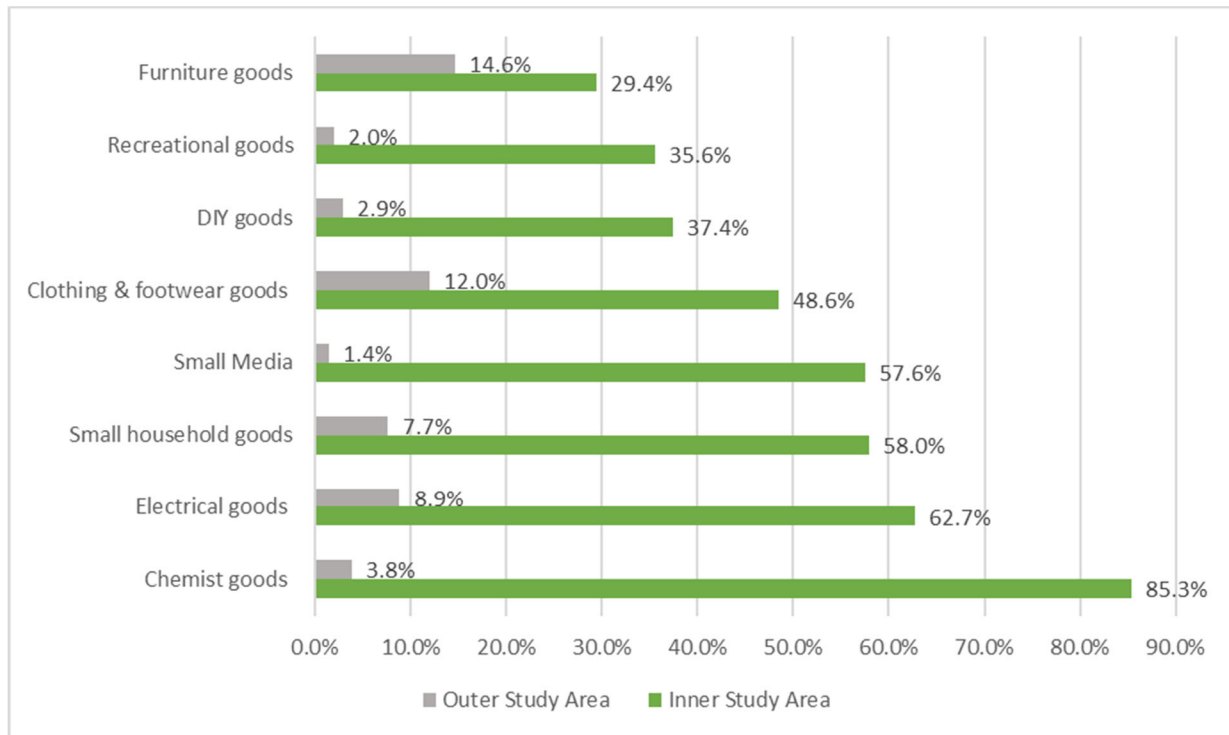


Source: Table 17a, Appendix C

5.50 In the graph below, we analyse the market share of different types of comparison goods, considering which items are purchased from stores and centres inside the Council area, and what the propensity is to travel further afield for certain items.

5.51 The survey results show that there is some variance between spending on different goods categories, as well as between the Outer Study Area and the Inner Study Area. Looking at the figures for the Inner Study Area, the amount of spending carried out within the Council area varies from 29.4% of spending on furniture goods, to 85.3% of spending on chemist goods. The residents of the Outer Study Area look primarily to the Council area for clothing & footwear and furniture goods.

Figure 5.51.1 Comparison Goods Market Share spent at destinations in Vale of Glamorgan



Source: Tables 9a to 16a, Appendix C

5.52 Looking at the market shares of the Inner Study area, the table below sets out the top destinations to shop for each good category.

Figure 5.52.1 Top Comparison Destinations (for residents of the Inner Study Area)

Type of Goods	Locations in the Council Area
Chemist	Barry Holton Road TC – 20.0% Penarth TC – 13.8%
Clothing & Footwear	OoC - Culverhouse Cross (VoG side) – 25.5%
DIY	OoC - Barry Ty Verlon Industrial Estate – 12.2% Penarth TC – 7.8%
Electrical	OoC - Culverhouse Cross (VoG side) – 37.0%
Furniture	OoC - Culverhouse Cross (VoG side) – 9.7% Barry Holton Road TC – 8.7%
Recreational	OoC - Barry Waterfront Retail Park – 9.1% Barry Holton Road TC – 5.0%
Small Household	OoC - Culverhouse Cross (VoG side) – 25.2%
Small Media (Books/ CDs/ DVDs)	Barry Holton Road TC – 17.2% Penarth TC – 11.7%

Source: Tables 9a to 16a, Appendix C

Comparison Goods Capacity

- 5.53 The methodology for calculating capacity for comparison goods floorspace differs from that used to model capacity for convenience goods floorspace. The principal reason for this is that there are no robust, industry standard, benchmark sales densities for calculating the turnover of smaller independent retailers that typically make up the majority of the comparison provision of town centres (although it is noted that sales densities are published for national multiple comparison retailers). Moreover, the trading levels of comparison retailers can fluctuate significantly depending on a number of localised variables, most notably the location of the retailer relative to similar providers (as customers are more likely to link multiple comparison goods trips to retailers in close proximity to each other).
- 5.54 As such, we adopt the approach that comparison goods retailers across the Study Area are trading ‘at equilibrium’ at 2023, meaning we adopt the survey derived turnover of each facility and examine capacity by measuring the growth in available expenditure to 2036. For the purposes of our assessment, we have assumed that the Council’s attraction to Study Area residents will remain constant at 18.5% of all spending proportionate to population growth (Table 18a of Appendix C). Based on the limited scale of planned developments inside and nearby the Local Authorities, we consider this a robust basis for analysis. The survey turnover is then adjusted to account for inflow from outside of the Study Area, per Nexus professional judgment (at 2%). The difference between the survey derived turnover figure and the benchmark turnover is the gross comparison goods available expenditure.
- 5.55 We then consider committed and extant planning permissions for new comparison retail floorspace in the Council area that are likely to come forward over the plan period, again informed by our discussions with Council officers. This includes any developments that are currently under construction, or would not have been operating at the time of the household survey. In total, these committed developments equate to a net 1,772 sq m of comparison goods floorspace and an estimated turnover of £8.5m at 2023 (see Table 18c at Appendix C). The commitments are then projected forwards and deducted from the gross surplus expenditure. The figure below sets out the resultant net comparison goods capacity forecasts over time, whereby by 2036 there will be £3.2 m of comparison expenditure capacity.

Figure 5.55.1 Gross Comparison Goods Surplus

Year	Survey Derived Turnover (with Inflow) (£m):	Benchmark Turnover (£m)	(Gross) Available Expenditure before commitments (£m)	Turnover of all committed floorspace (£m)	Surplus Expenditure (£m)
2026	£440.8	£445.9	−£5.1	£8.8	−£13.9
2031	£506.9	£500.0	£6.8	£9.9	−£3.0
2036	£588.6	£574.1	£14.5	£11.3	£3.2

Source: Table 19a, Appendix C

- 5.56 We are then able to calculate the net comparison goods capacity floorspace for the Council area, as shown in the figure below. By 2036 we estimate there will be between 432 sq m net and 679 sq m net of comparison floorspace capacity across the Council area. We examine the policy implications of this in Section 12.

Figure 5.56.1 Net quantitative 'capacity' for new comparison goods in the Council area

Year	Surplus Expenditure (£m)	Total Capacity (sq m net)		
2026	-£13.9	-3,840	to	-2,443
2031	-£3.0	-745	to	-474
2036	£3.2	432	to	679

Source: Table 19a, Appendix C

Leisure Goods Findings

- 5.57 The results of the NEMS Household Telephone Survey offer an indication of locations/facilities where residents of the Study Area satisfy their leisure (namely Indoor Health & Fitness, Cinema, Restaurants, Pubs/Bars/Nightclubs, Ten pin bowling, Casino) and cultural needs. As such, the survey enables us to analyse patterns of travel and potential deficiencies (those that are qualitative in nature) within the Council area.
- 5.58 The modelling of future commercial leisure needs cannot necessarily be based upon the same quantitative model used to estimate retail need. This is because leisure spending is not undertaken regularly and is often influenced by cultural shifts and technological advances.
- 5.59 Nevertheless, we appraise the existing provision of leisure facilities across the Council area and compare this against recognised sector 'standards' or 'benchmarks'. The completion of this 'benchmarking exercise' allows us to establish deficits and where gaps in the provision of existing facilities may be.

Existing Market Shares

- 5.60 The NEMS Household Survey asked respondents to describe their leisure and cultural activities and habits. The responses to these questions (Questions 29-39) inform our understanding of leisure trends and needs. The breakdown of the answers to these questions is set out in full at **Appendix B** and we extrapolate the key results here.
- 5.61 In the first instance, it is important to understand the participation rates and general popularity of leisure activities across the Study Area. In Question 29 of the Household Survey, NEMS asked respondents to identify all of the leisure activities in which they participated (respondents were allowed to identify as many options as they wished). We summarise the results for Zones 1, 4 and 5 which broadly comprise the Council area (i.e. the 'Inner Study Area') in the figure below.

Figure 5.61.1 Participation in Leisure Activities in the Council Area (%)

Leisure Activity	Zone 1 – Barry	Zone 4 – Llantwit Major and Cowbridge	Zone 5 – Penarth	Inner Study Area
Indoor Health & Fitness	31.6%	40.0%	31.9%	33.3%
Cinema	49.2%	44.2%	65.7%	53.1%
Restaurant	78.4%	75.6%	85.9%	80.0%
Pubs/Bars/Nightclubs	59.4%	65.9%	76.7%	65.8%
Ten-pin bowling	10.1%	16.7%	11.5%	11.8%
Casino	0.8%	2.7%	2.5%	1.7%
Cultural Activities	47.2%	47.2%	55.0%	49.5%

Source: Appendix B. Question 29 of NEMS Household Survey

- 5.62 As evident in the figure above, the most popular leisure activity across the Council area is to go to a restaurant, which 80.0% of residents indicated they do on at least an occasional basis. The second most popular activity is visiting pubs/bars/nightclubs (65.8%), followed by visits to the cinema (53.1%). Visiting casinos (1.7%) is the least often undertaken activity, followed by ten-pin bowling (11.8%).
- 5.63 Generally speaking, leisure participation rates are above average when compared to our studies across the UK as a whole. This is especially true for visiting indoor health & fitness, cinemas, restaurants and pubs/bars/nightclubs. However, participation in cultural activities is lower than our observed average.
- 5.64 There were no significant differences in participation rates between Zones overall. However, broadly speaking, residents in Zone 5 (Penarth) are more likely to participate in leisure activities than elsewhere, with the highest level of participation for cinema-going, restaurant-going, visiting pubs/bars/nightclubs and cultural activities. Meanwhile, residents in Zone 1 (Barry) are marginally less likely to participate in leisure activities than counterparts elsewhere in the Council Area.
- 5.65 NEMS also asked a series of questions to understand where residents usually undertake their chosen leisure activities. We examine the most popular destinations for residents of the Council area in the figure below. Again, we only consider here the results for Zones 1, 4 and 5 which broadly comprise the Council area (i.e. the 'Inner Study Area')

Figure 5.65.1 Most Popular Leisure Destinations – Residents of the Council Area (%)

Leisure Activity	First Choice	Second Choice	Third Choice
Indoor Health & Fitness	Barry Leisure Centre (39.6%)	Pure Gym, Cardiff Bay Retail Park (8.5%)	Barry Town Centre (5.3%)
Cinema	Odeon, Hemingway Road, Cardiff Bay (65.6%)	Odeon, Glen Retail Park, Bridgend (25.5%)	Everyman Cinema, Mermaid Quay, Cardiff (16.5%)
Restaurant	Cardiff City Centre (26.6%)	Penarth Town Centre (23.69%)	Barry Town Centre (12.2%)
Pubs/Bars/Nightclubs	Barry Town Centre (28.7%)	Penarth Town Centre (26.3%)	Cardiff City Centre (6.2%)
Ten-pin bowling	Hollywood Bowl, The Red Dragon Centre, Hemingway Road, Cardiff (45.9%)	Cardiff Bay Retail Park (34.2%)	Cardiff City Centre (7.1%)
Casino	Grosvenor Casino, The Red Dragon Centre, Hemingway Road, Cardiff (44.0%)	Cardiff City Centre (32.2%)	Les Croupiers Casino, Capital Shopping Park, Cardiff (23.7%)
Cultural Activities	Wales Millennium Centre, Bute Place, Cardiff (37.1%)	Cardiff City Centre (15.1%)	New Theatre, Park Place, Cardiff (12.2%)

Source: Appendix B. Questions 30-36 of NEMS Household Survey

- 5.66 Overall for indoor health & fitness, Restaurants, pubs/bars/nightclubs residents of the Council area favour destinations within the Council Area (namely Barry and Penarth), albeit facilities in Cardiff appear to be the main competitors. In relation to Cinema, ten-bin bowling, casinos and cultural activities, residents of the Council area favour destinations in Cardiff.
- 5.67 Looking at First Choice answers, destinations in Cardiff dominate the leisure scene, with Barry town centre favoured for its pubs/bars/nightclubs offer.
- 5.68 As such, it would appear that whilst Barry and Penarth have adequate leisure facilities of most types, the scale and nature of facilities in Cardiff are understandably attractive to the residents of those zones.

Need for Additional Leisure Facilities

- 5.69 The figure below presents the analysis of Question 37 of the Household Survey. We isolate the responses for each Zone of the Inner Study Area in order to identify what the main requests for new leisure facilities were from residents in each area, and whether there are any easily identifiable gaps in provision. More than one suggestion was allowed.

Figure 5.69.1 Top Leisure Activities residents want to see more of (%)

Leisure Activity	Zone 1 – Barry	Zone 4 – Llantwit Major and Cowbridge	Zone 5 – Penarth	Inner Study Area
Nothing	31.5%	30.2%	47.0%	35.8%
Cinema	28.3%	27.7%	7.3%	22.0%
Better shopping facilities	21.5%	10.4%	18.2%	18.3%
Restaurants	17.2%	9.5%	19.4%	16.4%
Leisure Centre and/or Swimming Pool	12.1%	23.6%	4.2%	12.0%
More children facilities/activities	12.0%	7.7%	14.6%	11.9%
Bars/pubs	19.4%	6.8%	0.8%	11.5%
Cultural Uses	8.1%	4.3%	6.8%	7.0%
Health and fitness (gym)	4.2%	9.9%	6.9%	6.1%
Bowling alley	6.8%	11.7%	0.9%	6.0%
Other children’s entertainment	6.6%	8.6%	3.3%	6.0%

Source: Appendix B. Question 37 of NEMS Household Survey

- 5.70 Overall, whilst just over a third of all respondents across the Council area (35.8%) did not identify any leisure facilities which they wished to see more, Cinema (22.0%), Better shopping facilities (18.3%) and Restaurants (16.4%) were identified as the top priorities.
- 5.71 The residents of Zone 1 (Barry) identified the need for a new cinema (28.3%), better shopping facilities (21.5%) and more bars/pubs (19.4%) as their top priorities.
- 5.72 The residents of Zone 4 (Llantwit Major and Cowbridge) are the least satisfied with the overall leisure provisions. Residents there identified the need for a new cinema (27.7%), Leisure Centre and/or Swimming Pool (23.6%) and bowling alley (11.7%) as the top priorities.
- 5.73 Residents of Zone 5 (Penarth) are the most satisfied with the overall leisure provisions, with 47.0% not identifying any leisure facilities which they wished to see more. This is likely due to the fact that this Zone is closer to Cardiff and its associated leisure offer. However, the need for more restaurants (19.4%), better shopping facilities (18.2%), and more children facilities/activities (14.6%) have been identified as the top priorities.

Capacity for Additional Leisure Facilities

- 5.74 Having identified existing market shares and examined the demand for new facilities from the Council Area’s residents, we consider here the potential supply-side issues for the provision of new leisure facilities. The purpose of this assessment is to examine the realism and viability of actually providing for new facilities through the Plan process in particular.

5.75 The findings of the NEMS Household Survey allow us to assess market shares within the Council Area for a variety of leisure sectors. As such, we have undertaken a ‘benchmarking’ exercise by referencing the estimated increases in the Council Area population. The results of the ‘benchmarking’ exercise have been used to inform our conclusions with regard to the prospective future need for additional commercial leisure facilities.

Health and Fitness Capacity

5.76 The Leisure Database Company²⁶ (2022) identify that the health and fitness market is in good shape considering the disruptions of Covid-19, with overall results showing some key metrics to be running at the same levels as 2018/2019 levels, when the industry was having a 'golden moment'. Since the previous State of the Fitness Industry Report (2019), 631 clubs have closed however, 455 new facilities have opened, meaning the overall number of sites has only dropped 2.43% from 7,239 in 2019 to 7,063 in 2022, a difference of 176 clubs. In terms of membership rates across the whole of the UK, 14.6% of the UK’s population are registered members at private health and fitness clubs, compared to 15.6% in 2019.

5.77 In 2016, Statista reported that the average size of mainstream gym, health-club and leisure centre membership in the UK was approximately 5,250 members per club. Building on this, our household survey results showed that approximately 33.3% of residents in the Inner Study Area participate in health and fitness activities (Q29). Of those, the survey results suggest that around 72.8% of residents currently carry out their health & fitness activities within the Council Area itself (Q30). We term this the ‘Council-wide retention rate’ and use it as a benchmark (assumed to be constant) to underpin our assessment of the number of additional facilities that can be supported in the Council Area over time.

5.78 In the figure below we identify that the Inner Study Area has a population of 134,553 at 2023, which is set to increase to 142,446 by 2036. Based on the current participation rates, attraction rates, and average club size membership identified above, we calculate that the Council’s residents would support around 7 large indoor health and fitness centres over the Plan period.

Figure 5.78.1 Health & Fitness Centre Capacity

Year	Inner Study Area Population	Regular Participants @ 33.3%	Citywide Retention Rate @ 72.8%	Average Membership	No. of Clubs Supported in the Council Area
2023	134,553	44,806	32,619	5,250	6.2
2026	136,771	45,545	33,157	5,250	6.3
2031	139,829	46,563	33,898	5,250	6.5
2036	142,446	47,435	34,532	5,250	6.6

Source: Nexus Analysis

5.79 Comparing capacity to existing supply, the results of Question 30 of the household survey showed that there are at least 7 recognised indoor health and fitness facilities within the Council Area (namely, Barry Leisure Centre, Penarth Leisure Centre, Llantwit Major Leisure Centre, Snap Fitness in Barry, Studio Viva Ladies Fitness in Cowbridge, Cowbridge Leisure

²⁶ [State of the UK Fitness Industry 2012](#), Leisure Database Company, 2022 as summarised by [Leisure Opportunities](#) and [HCM](#)

Centre, Fontygary Leisure Park in Rhoose). Other answers to Question 30 included additional 10 locations albeit without naming a specific establishment.

- 5.80 The supply of 7 larger indoor health and fitness facilities is on par with the estimate capacity figure. However, the qualitative results of our survey point towards a potential lack of health and fitness facilities in the Council area to meet its residents' needs – in the Inner Study area, 6.1% of residents identified the need for health and fitness (gym) facilities; and 12.0% identified the need for Leisure Centre and /or Swimming Pool. The need for these facilities in Zone 4 (Llantwit Major and Cowbridge) is much greater compared to the other two zones (23.6% for Leisure Centre and /or Swimming Pool, and 9.9% for health and fitness (gym)).
- 5.81 We therefore recommend that the Council adopts a positive policy position towards new health and fitness facilities in general, not least because of the health and well-being benefits for residents, but that there is unlikely to be a requirement to allocate any specific site for this purpose, notwithstanding population growth.

Cinema Capacity

- 5.82 The NEMS Household Survey outlines that in the Inner Study Area, 53.1% of residents visit the cinema. However, the majority of the resident population (97.6%) favour cinema establishments outside of the Council Area, namely facilities in Cardiff, and to a lesser extent in Bridgend. However, this is based on the fact that there is only one dedicated cinema in Vale of Glamorgan - Snowcat Cinema in Penarth (1 screen). Memo Arts Centre in Barry and Llancafarn Community Cinema also do film screening, but these are multiuse venues as opposed to full-time cinemas.
- 5.83 In 2019 (before the impact of Covid-19 on the cinema industry)²⁷, the UK Cinema Association identified that total UK cinema admissions were 176.1 million, equating to 2.7 trips per person. They also identified 840 cinema facilities with 4,564 screens in the UK, equating to 937,161 cinema seats in the UK in 2019. Based on this data, the UK yearly average was 38,585 cinema trips per screen.
- 5.84 As shown in the figure below, in order to gauge the number of cinema screens that can be supported in the Council Area over the Plan period, we have calculated the anticipated cinema attendance (based on the national average of 2.7 trips per person) and by assuming that 50% of all cinema trips would take place within the Council Area. This identified capacity for 5 screens within the Plan period.
- 5.85 We also note that our qualitative findings showed discontent with existing cinema provision, with 22.0% of respondents in the Inner Study area requesting additional cinema facilities (Question 37). This figure is driven primarily by the results from Zone 1 (Barry) with 28.3% and Zone 4 (Llantwit Major and Cowbridge) with 27.7%.
- 5.86 As such, there appears to be both quantitative and qualitative capacity for additional cinema screens. We would recommend that this is directed towards the centres in Zone 1 (Barry) and/or Zone 4 (Llantwit Major and Cowbridge).

²⁷ It is noted that the latest data on cinema [annual admissions](#) and [facilities](#) that is currently available is for 2022. However, given that the film production industry is still recovering from the Covid-19 pandemic it is considered that the data for 2022 is not suitable to use for future projections.

Figure 5.86.1 Cinema Screen Capacity

Year	Inner Study Area Population	Estimated Cinema Attendance based on national attendance average of 2.7	Assumed Retention Rate at 50%	Trips per Screen	Cinema Screens Supported
2023	134,553	363,293	181,647	38,585	4.7
2026	136,771	369,282	184,641	38,585	4.8
2031	139,829	377,538	188,769	38,585	4.9
2036	142,446	384,604	192,302	38,585	5.0

Source: Nexus Analysis

Ten-Pin Bowling Capacity

- 5.87 Ten-pin bowling has generally experienced a decline over the last decade, with a gradual reduction in the number of facilities. In 2014, Mintel identified that there were 5,617 bowling lanes²⁸, a decrease since 2011 when 5,773 bowling lanes were identified²⁹. More recent data from 2023 suggests that this number has declined further to around 3,700 lanes across the UK³⁰.
- 5.88 Taking into account the UK projected population for 2023 (68.6 million³¹), this equates to one lane for every 18,563 persons.
- 5.89 The NEMS Household Survey outlines that in the Inner Study Area, 11.8% of residents visit ten-pin bowling venues. However, the majority of the resident (96.1%) favour ten-pin bowling establishments outside of the Council Area, namely facilities in Cardiff. However, this is based on the fact that there is only one dedicated ten-pin bowling venue in Vale of Glamorgan - Fontygary Leisure Park in Barry (4 lanes).
- 5.90 The figure below indicates that, based on the assumed benchmark, the Council's population supports around 8 lanes over the Plan period. On this basis, with the current supply of 4 lanes by a singular venue, there is a potential quantitative capacity of 4 additional lanes.
- 5.91 We also note that our quantitative findings showed that 6.0% of respondents in the Inner Study area requested additional bowling alley facilities (Question 37). This figure is driven primarily by the results from Zone 4 (Llantwit Major and Cowbridge) with 11.7%. and Zone 1 (Barry) with 6.8 %.
- 5.92 We recommend that the Council adopts a positive policy position with regard to ten-pin bowling schemes in general. However, there is unlikely to be a requirement to allocate any specific site for this purpose, on the basis of ten-pin bowling being an industry in decline and the fact that in practice ten-pin bowling facilities in Cardiff would meet any identified quantitative capacity.

²⁸ Ten-pin Bowling – UK' Mintel, May 2014

²⁹ 'Ten-pin Bowling – UK', Mintel, November 2011

³⁰ www.gotenpin.co.uk/about

³¹ 68,682,459 – Experian population projections, 2021.

Figure 5.92.1 Bowling Lane Capacity

Year	Inner Study Area Population	Population per Bowling Alley	Lanes Supported
2023	134,553	18,563	7.2
2026	136,771	18,563	7.4
2031	139,829	18,563	7.5
2036	142,446	18,563	7.7

Source: Nexus Analysis

Restaurants, Pubs, Bars and Café Capacity

- 5.93 We have undertaken an assessment of the potential capacity for additional food and beverage floorspace across the Council Area, utilising current market shares as identified through the Household Survey, population and spending growth rates and benchmarking against current levels of provision.
- 5.94 This exercise identifies the future spending available to support additional food and beverage floorspace (in the form of restaurants, pubs, bars, café etc.) over the Plan period to 2036. This approach is not prescriptive, but instead provides an indication of the scope for future development to be supported, in addition to the findings of the assessments of the key centres.
- 5.95 Experian provides localised data on spending on restaurants and cafés per capita, which includes spending on alcoholic drinks (away from home) and take-away meals. This spending was shown to be £1,487 per person per annum for residents in the Inner Study Area (2020 prices), growing to £1,659 per person per annum in 2036.
- 5.96 Taking into account the population growth, and anticipated leisure spending growth rates (Experian Retail Planner 20, Figure 1a), we calculate, in the figure below, a total spend across the Inner Study Area of £200.0 m at 2023, increasing to £236.4 m by 2036.
- 5.97 This spending is then attributed to the restaurant, café and bar facilities across the Council Area. The household survey results (Q32 and Q33) showed that restaurants, cafés, bars and pubs within the Council Area ‘retained’ 72.3% of their own residents' spending.
- 5.98 The 2023 retained turnover figure is then used to calculate the ‘benchmark’ turnover at the assessment years, by applying Experian density growth rates to account for growth through extensions and trading efficiencies over the Plan period. We find a total food and beverage spending surplus across the Council Area of £28.7m by 2036.
- 5.99 Adopting an average sales density of £5,000 per sq m at 2023 (again, projected to grow in line with Experian density growth rates) we calculate the typical restaurant, pub, bar and café floorspace that could be supported by the identified surplus expenditure. This is shown as being up to 5,846 sq m by 2036. This should be treated only as a rough guide.
- 5.100 We are highly cognisant of the fact that the recent pandemic will have resulted in the closure of a large amount of restaurant, bar and café floorspace across the Council Area. In addition to the pandemic, there have also been significant increases to business costs including energy and transport. Whilst our figures show that there is likely to be a pent-up

consumer demand for additional spending this area, this does not mean that all of that demand should be met through new floorspace. The potential re-occupation of vacant floorspace should be accounted for in the first instance. The Council should also account for any existing committed leisure developments in this respect – for example, we are aware that 1,885 sq m for food and drink (A3) floorspace has been built, but remains unoccupied, as part of the Barry Waterfront scheme (2019/01407/RES) – this would “eat into” the estimated capacity.

5.101 It should also be noted that in qualitative terms, 16.4% of the Inner Study Area population identified the need for more/better restaurants - this is driven primarily by the residents of Zone 1 (Barry) with 17.2% requesting improvements and Zone 5 (Penarth) with 19.4%. Looking at pubs and bars, 11.5% of the Inner Study Area requested more/better facilities – this is driven primarily by the residents of Zone 1 (Barry) with 19.4% requesting improvements.

Figure 5.101.1 Restaurants, Pubs, Bars and Café Spending

Year	Inner Study Area Population	Spend Per Capita	Total Spend	Council Area Retention Rate @ 72.3%	Benchmark Growth	Residual Spending
2023	134,553	£1,487	£200.0	£144.5	£144.5	-
2026	136,771	£1,513	£207.0	£149.6	£138.4	£11.1
2031	139,829	£1,587	£221.9	£160.3	£140.6	£19.7
2036	142,446	£1,659	£236.4	£170.8	£142.1	£28.7

Source: Nexus Analysis

Figure 5.101.2 Restaurant, Pubs, Bars and Café Capacity

Year	Residual Spending	Sales Density	Floorspace (sq m)
2026	£11.1	£4,788	2,326
2031	£19.7	£4,865	4,050
2036	£28.7	£4,914	5,846

Source: Nexus Analysis

Other Leisure Uses

5.102 Turning to consider cultural uses (theatre/museum/art galleries), the household survey suggested that the majority of Inner Study Area residents look outside of Vale of Glamorgan for their cultural activities (97.5% of respondents), with attractions in Cardiff dominating the scene. This suggests that the Council Area’s cultural uses are lacking. The survey also established that there was some demand for additional/improved cultural facilities with 7.0% of Inner Study Area respondents suggesting that they would like to see more/better facilities. We recommend that the Council adopts a positive policy position towards the provision of cultural uses in general.

5.103 The Household Survey also highlighted that 11.9% of the Inner Study Area residents wished to see more children’s facilities/activities, and 6.0% wished to see more entertainment facilities for children (referencing play spaces/park facilities, indoor soft play areas, paintballing, more teenage facilities/activities, and skateboarding). Together these activity groups form an 18.0% demand. This may be an area the Council should review in preparation for their emerging Plan.

Leisure – Summary

5.104 The above findings present the quantitative and qualitative capacity for new leisure development in the Vale of Glamorgan Council area. As we noted earlier in this Study, leisure spending is not undertaken regularly, and residents will often visit a variety of different facilities depending on a number of factors.

- Whilst there is no identified quantitative capacity for new Health & Fitness provisions, qualitative demand exists. We recommend that the Council adopts a positive policy position towards such schemes.
- There appears to be both quantitative and qualitative capacity for a small additional cinema. We would recommend that any market demand for this is directed towards the centres in Zone 1 (Barry) and/or Zone 4 (Llantwit Major and Cowbridge).
- There appears to be both quantitative and qualitative capacity for ten-pin bowling. We recommend that the Council adopts a positive policy position towards such schemes in general. However, there is unlikely to be a requirement to allocate any specific site for this purpose, on the basis of ten-pin bowling being an industry in decline and the fact that in practice ten-pin bowling facilities in Cardiff would meet any identified quantitative capacity.
- There appears to be both quantitative (5,846 sq m) and qualitative capacity for an additional food and beverage floorspace. Whilst our figures show that there is likely to be a pent-up consumer demand for additional spending in this area, this does not mean that all of that demand should be met through new floorspace. The potential re-occupation of vacant floorspace should be accounted for in the first instance. The Council should also account for any existing committed leisure developments in this respect.
- There is a small qualitative demand for cultural activities.
- There is qualitative demand for facilities and activities for children.

6. Methodology for Town Centre Health Checks

- 6.1 Health checks are recognised as important planning ‘tools’ for appraising and monitoring the changes in the overall vitality and viability of town centres and informing both plan-making and decision-taking at the local level.
- 6.2 In this context, this Study provides detailed health check assessments for Barry Holton Road Town Centre, and for the four District Centres of Barry High Street / Broad Street, Cowbridge, Llantwit Major and Penarth.
- 6.3 The health checks have been carried out in accordance with TAN 4, which establishes a number of key performance indicators used to help assess and monitor the overall health and performance of the centres. The general methodology is set out below.

Retail Composition and Vacancies

- 6.4 The composition data is based on Nexus Planning survey of ground floor units within adopted centre boundaries, as undertaken in March 2023. The units surveyed are arranged into the standard Experian Goad categories i.e. convenience, comparison, service uses, and vacant units. Please note that Goad categorisations do not directly correspond with Use Class Order definitions.
- 6.5 The health checks provide an effective ‘gap’ analysis tool to help identify retail types and categories that are under or over-represented in centres. This is based on benchmarking against Goad UK averages (Experian Category Report, 2023) for all circa 1,950 centres and shopping locations covered by Experian.
- 6.6 A full-scale set of plans covering each centre of the current retail hierarchy is contained at **Appendix D**.

Environmental Quality and Perception of Safety

- 6.7 An assessment of environmental quality including cleanliness and attractiveness, security and treatment of buildings and open spaces, is undertaken using our own research and observations of the centres.

Accessibility

- 6.8 A centre’s vitality and viability can also be understood through an assessment of accessibility. This is undertaken through our own research, using observations of how easy a centre is to reach; mobility time and cost; public transportation; traffic management and signage; barriers; car parking; and access by other modes (such as cycle or walking). Where possible, we have also drawn on stakeholder feedback to help inform our assessment, as well as NEMS household survey results.

Rental Values

- 6.9 Rental values have been obtained under license from CoStar.

Commercial Demand

- 6.10 We have established commercial demand for each centre (where available) by utilising occupier requirements from The Requirements List³².

³² <https://www.therequirementlist.com/>

Town Centre Turnover

- 6.11 Town centre turnover is derived from the results of the Household Survey, as presented in **Appendix C**. The figures provide the evidenced turnover of each centre in terms of their convenience and comparison goods components.

Public Opinion

- 6.12 NEMS household survey asked a number of qualitative questions about what features of the centres that are most liked, and what features are the most disliked.

7. Barry Holton Road Town Centre Health Check

Description

- 7.1 Barry Holton Road is a linear semi-pedestrianised town centre, which is centred around King Square. With a total of 160 units, in terms of size, it is on par with Penarth (168 units).

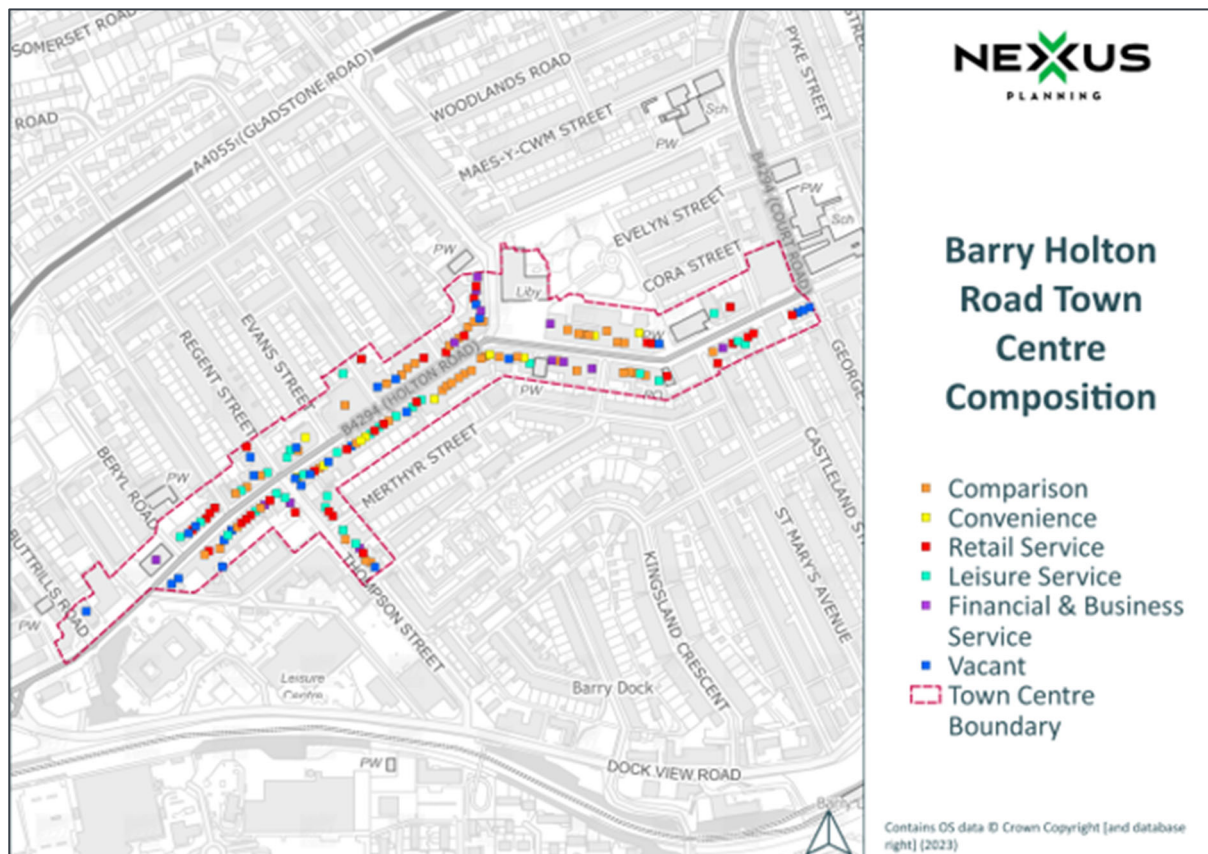
Figure 7.1.1 Photos of Barry Holton Road



Source: Nexus site visit (March 2023)

GOAD Composition and Vacancies

Figure 7.1.2 Barry Holton Road Composition Map

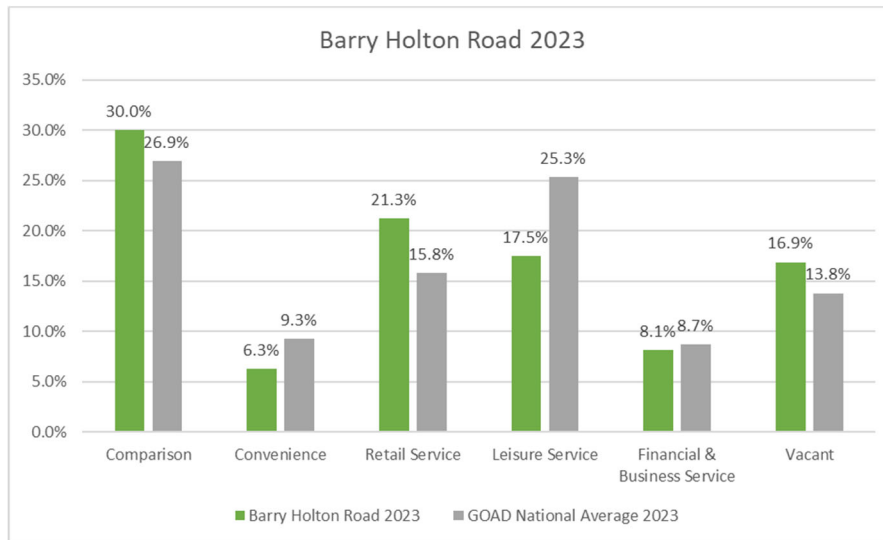


- 7.2 The centre hosts 160 units. It has a relatively strong comparison and retail services offer, but lacks in convenience and leisure offer. The household survey noted that 61.7% of visitors to the centre stated that improving the choice and range of the overall offer would encourage them to visit the centre more often.
- 7.3 The comparison offer consists of 48 units, making up 30.0% of the total offer, which is much higher than the UK average (26.9%). These are a mix of independent retailers, and national multiples, such as W H Smith, The Works and Shoe Zone. The comparison offer is diverse, however, it is mainly aimed towards lower budgets.
- 7.4 6.3% (10 units) of total units are convenience, which is significantly lower than the UK average of 9.3%. This includes both small convenience stores, butchers and bakers, and also Tesco Express.
- 7.5 Services make up 46.9% (75 units) of the total offer, which is slightly lower than the UK average (49.8%).
- Retail services make up 21.1% (34 units) of the total offer, which is higher than the UK average of 15.8%. These units are primarily hairdressers, barbers and beauty salons.
 - Leisure services make up 17.5% (28 units) of the total number of units, which is significantly lower than the UK average (25.3%). The leisure offer consists of independent restaurants, cafes and takeaways.
 - Financial & Business Services make up 8.1% (13 units), which is slightly lower than the UK average (8.7%).
- 7.6 27 units (16.9% of the total offer) are vacant. This is higher than the UK average (13.8%). These are clustered towards the western end of the centre.

Figure 7.6.1 Barry Holton Road Composition Table

Categories	Barry Holton Road 2023		UK Average 2023
	(#)	(%)	(%)
Comparison	48	30.0%	26.9%
Convenience	10	6.3%	9.3%
Services (Total)	75	46.9%	49.8%
<i>Retail</i>	34	21.3%	15.8%
<i>Leisure</i>	28	17.5%	25.3%
<i>Financial & Business</i>	13	8.1%	8.7%
Vacant	27	16.9%	13.8%
TOTAL	160	100%	100%

Figure 7.6.2 Barry Holton Road Composition Graph



Environmental Quality and Perception of Safety

- 7.7 Whilst the quality of the environment improves from east to west, overall, the centre would benefit from significant improvement to its public realm. The household survey noted that 21.5% of visitors to the centre stated that improving the quality of the environment would encourage them to visit the centre more often.
- 7.8 The centre appears dated, and somewhat unkept. Litter was noticed to be a problem around the centre, with there being very few bins. Graffiti was also noticed throughout the centre. The high number of vacant units, which tend to cluster towards the western end, further detracted from the overall appearance of the centre. Whilst the centre benefits from some interesting facades, a lack of maintenance is noticeable.
- 7.9 King Square is a pleasant public space, which benefits from some seating and planting. However, this space appears to be underutilised. The centre also benefits from a number of planters and benches, although this could be improved further.
- 7.10 The centre feels least safe compared to all other centres reviewed as part of this Study. Some signs of antisocial behaviour were noted during the site visit. The household survey also found that 12.7% of respondents identified that better security would encourage them to visit the centre more often.

Accessibility and Pedestrian Flow

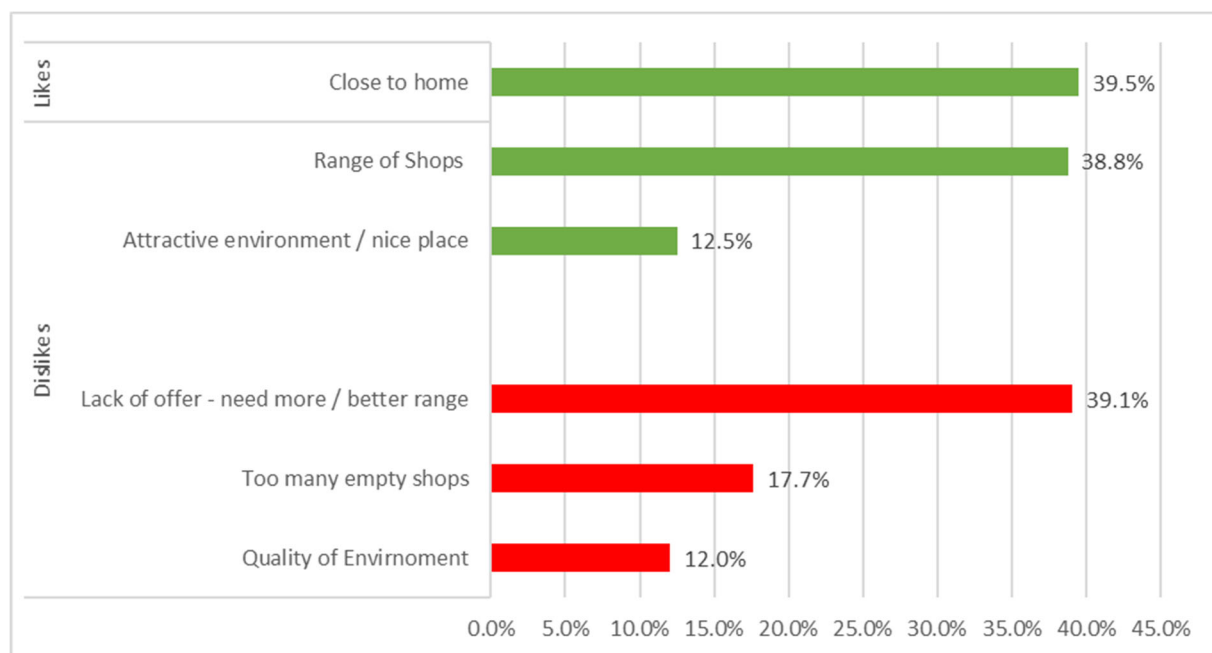
- 7.11 The centre is linear in nature and is easy to navigate through, however, it does lack a clear gateway on both ends.
- 7.12 Some street signage was observed around the centre. The eastern section of the centre is pedestrianised. Wide pavements are present along the northern side of Holton Road.
- 7.13 To the south of the pedestrianised area of Holton Road, one-way traffic movement is in place, providing traffic-calming measures, in turn increasing the safety for pedestrians. Although it is safer for pedestrians, there is a distinct lack of crossing points. To the north of the pedestrianised area of Holton Road, there are no traffic calming measures in place, with two way traffic. Crossing points are mostly found at junctions along this section of Holton Road making it safer for pedestrians to cross, however some additional zebra crossings would be beneficial.

- 7.14 The majority of visitors to the centre arrive by car (69.4%). On-street parking is provided along the non-pedestrianised parts of Holton Road, and is free for two hours. There is also a free long-stay car park at the eastern edge of the centre's boundary, meaning the centre is highly accessible by private vehicles. Only 6.2% of those that visit the centre identified the need for improving parking facilities.
- 7.15 21.7% of visitors to the centre arrive by bus. There are bus stops outside Barry Library on Tynnewydd Road and to the west of Holton Road providing regional services to Llantwit Major, Cardiff, Lower Penarth and Colcot Circular as well as local services to Barry, Barry Island and Barry Dock.
- 7.16 Some cycling racks are provided, though there are no cycle lanes in the centre.

Public Opinion

- 7.17 Results from the household survey identified the top “likes” and “dislikes” of the town centre, as seen below.

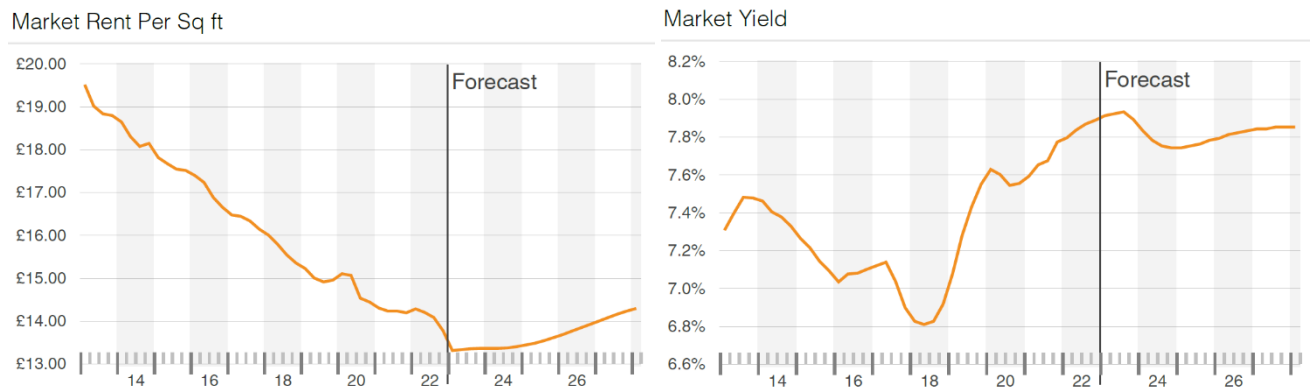
Figure 7.17.1 Barry Holton Road Public Opinion



Rents and Yields

7.18 The CoStar Retail Report 2023 identifies the market rent per square foot to be £13.36 and the market yield to be 7.9%.

Figure 7.18.1 Market rent per SF and market yield for Barry Holton Road



Centre Turnover

- 7.19 Barry Holton Road turns over £55.5m from the Study Area, which makes it the highest trading centre in the Council Area.
- 7.20 The centre has a relatively low convenience turnover (£7.1m) due to the very limited offer (with the largest convenience retailer being Tesco Express). The majority of local residents (72.1% of Zone 1) look to Barry’s out-of- centre food stores (namely Asda, Ffordd Y Mileniwm; Morrisons Superstore, Penny Way; Tesco Superstore, Stirling Road; and Lidl, Cennin Pedr), which are cumulatively overtrading by an average of 41.3% against their respective company averages.
- 7.21 Out of all the centres, Barry Holton Road has the highest comparison goods turnover at £48.4m per annum, which is driven by clothing & footwear, small media and to a lesser extent chemist goods. It is however noted that Barry’s out-of- centre comparison destinations have a higher draw of £68.2m per annum which indicates significant competition. Cardiff and Culverhouse Cross are also key comparison goods competitors.

Figure 7.21.1 Barry Holton Road Turnover and % draw from the Inner Area

Category	Centre Turnover (p/a) (from the Study Area)	% draw from the Inner Study Area
Convenience	£7.1m	2.2%
Comparison	£48.4m	8.3%
Clothing & footwear	£10.4m	8.8%
Furniture goods	£5.3m	8.7%
DIY goods	£1.7m	3.5%
Electrical goods	£5.3m	6.5%
Small Household goods	£5.4m	5.2%
Small Media	£9.4m	17.2%
Chemist goods	£6.5m	20.0%
Recreation goods	£4.4m	5.0%
Total Retail	£55.5m	

Source: Appendix C

Commercial Demand

7.22 We have identified five operators that seek representation in the town of Barry (covering both Holton Road and High Street). This is shown in the table below.

Figure 7.22.1 Operator Requirement List for Barry

Occupier	Description	Size (min) sq m	Size (max) sq m
Aldi	Supermarket	1,700	2,000
Lidl	Supermarket	1,700	2,400
Pizza Hut Delivery	Pizza Delivery	60	200
Poundstretcher	Retail Value Store	560	2,800
Travelodge	Hotel	930	3,700

Source: The Requirement List (April 2023)

Summary of Key Issues

7.23 Whilst Barry Holton Road town centre has a strong comparison and retail services offer, it lacks in convenience and leisure offer.

7.24 An introduction of a medium to larger supermarket could be beneficial.

7.25 Improvements to the wider leisure offer should also be sought. It is noted that the market share analyses found that residents of Zone 1 (Barry) identified the need for a new cinema (28.3%) and more bars/pubs (19.4%) as the top priorities.

- 7.26 The centre also has a high number of vacant units, which tend to cluster toward the western end of the centre. This significantly detracts from the overall perception of the centre and customer experience. Efforts should be made to allow re-occupation, and to, in turn, improve the overall quality of the offer in the centre.
- 7.27 The centre would also benefit from investment into the public realm, maintenance and safety, in order to improve the overall quality of the environment. Kings Square appears to be an under-utilised feature of the centre.

8. Barry High Street District Centre Health Check

Description

- 8.1 Barry High Street is primarily focused along High Street and Broad Street, which run parallel to each other. With 121 units this is one of the smaller district centres. The centre's role is focused around its retail and leisure services. Barry railway station is located 110 m from the town centre boundary.

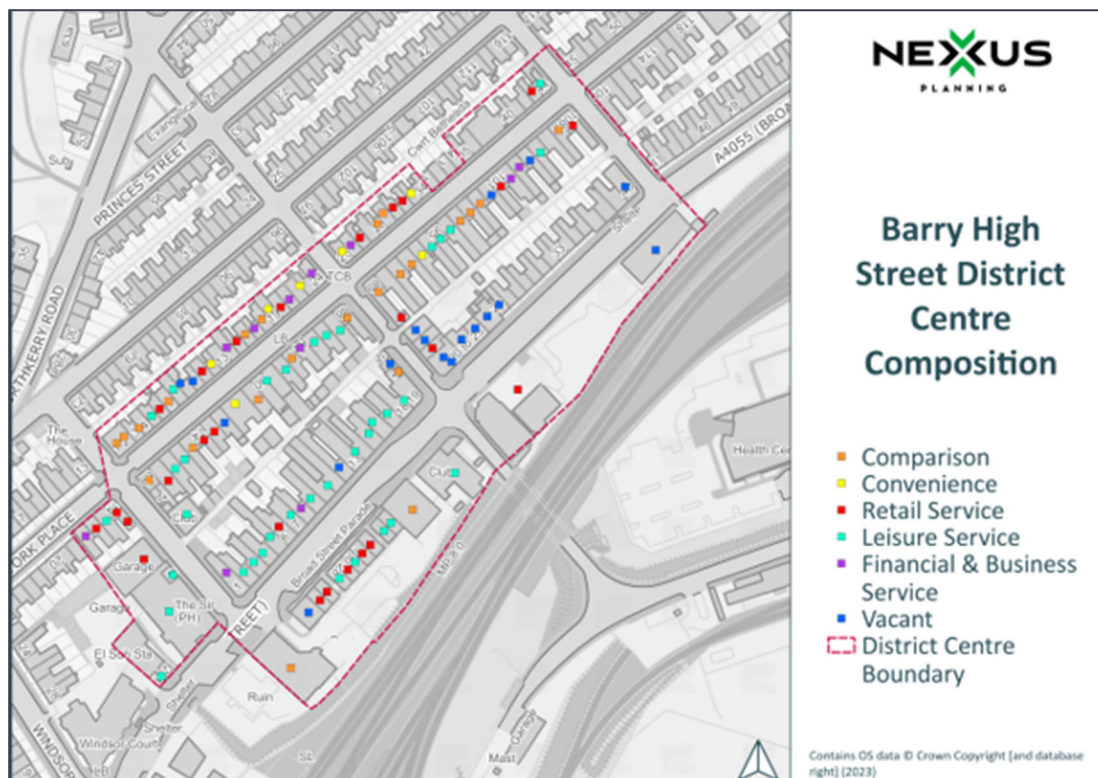
Figure 8.1.1 Photos of Barry High Street



Source: Nexus site visit (March 2023)

GOAD Composition and Vacancies

Figure 8.1.2 Barry High Street Composition Map

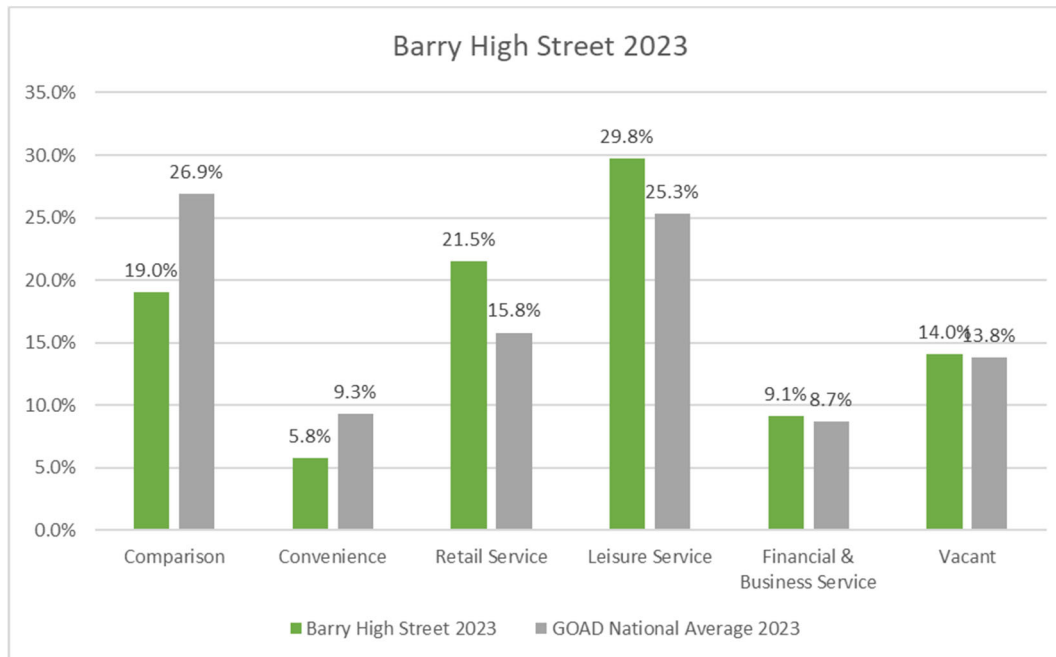


- 8.2 There is a total of 120 units within the centre. The centre’s role is focused around its retail and leisure services. The household survey noted that 61.0% of visitors to the centre stated that improving the wider choice and range of the offer with the centre would encourage them to visit more.
- 8.3 The comparison offer consists of 23 units, which makes up 19.0% of the total offer, which is significantly lower than the UK average (26.9%). The comparison offer is diverse and consists primarily of independent retailers.
- 8.4 5.8% (7 units) of total units are convenience, which is below the UK average (9.3%). A majority of the convenience stores are independent, with the national retailers being Best One and Premier.
- 8.5 Services make up 60.3% (73 units) of the total offer, which is significantly higher than the UK average (49.8%).
- a. Retail services make up 21.5% (26 units) of the total offer, which is higher than the UK average of 15.8%. These units are primarily hairdressers, barbers and beauty salons.
 - b. Leisure services make up 29.8% (36 units) of the total number of units, which is higher than the UK average (25.3%). The leisure offer consists of independent restaurants, cafes and takeaways.
 - c. Financial & Business Services make up 9.1% (11 units), which is similar to the UK average (8.7%). This offer consists mainly of Estate Agents.
- 8.6 14% of the total offer (17 units) is vacant. This is above the UK average of 13.8%. The majority of the centre’s vacant units are clustered at the junction of Broad Street and Island Street.

Figure 8.6.1 Barry High Street Composition Table

Categories	Barry High Street 2023		UK Average 2023
	(#)	(%)	(%)
Comparison	23	19.0%	26.9%
Convenience	7	5.8%	9.3%
Services (Total)	73	60.3%	49.8%
<i>Retail</i>	26	21.5%	15.8%
<i>Leisure</i>	36	29.8%	25.3%
<i>Financial & Business</i>	11	9.1%	8.7%
Vacant	17	14%	13.8%
TOTAL	120	100%	100%

Figure 8.6.2 Barry High Street Composition Graph



Environmental Quality and Perception of Safety

- 8.7 The centre consists primarily of two streets: Barry High Street and Broad Street.
- 8.8 Barry High Street benefits from a pleasant environment and a unique character. This part of the centre sits along a narrow street, and whilst this adds to its quaint charm, this section is dominated by traffic and parked cars which in turn take away from the perception of the place. The majority of the facades are of high quality and well-kept. The street also benefits from hanging topiary balls, which have played a part in enhancing the sense of place. There are very few vacant units along the High Street, and where there are vacancies, their presence does not detract from the overall feeling of high environmental quality.
- 8.9 Moving down towards Broad Street, the environmental quality drops. The architectural style is less attractive, and the facades are less well-maintained. The majority of the centre’s vacant units are clustered at the junction of Broad Street and Island Street, which has a negative impact on the character of this section of the centre.
- 8.10 The centre is generally clean and litter-free throughout, though it would benefit from more cleaning and maintenance. The centre also lacks green spaces and landscaping, and public seating. Opportunities should be explored to improve the overall public realm, albeit it is noted that the narrow urban gain could make this difficult
- 8.11 The centre generally feels safe and pleasant. At the time of the visit, there were no noticeable signs of antisocial behaviour. No visible CCTV was noted. The household survey did not identify any issues with security.

Accessibility and Pedestrian Flow

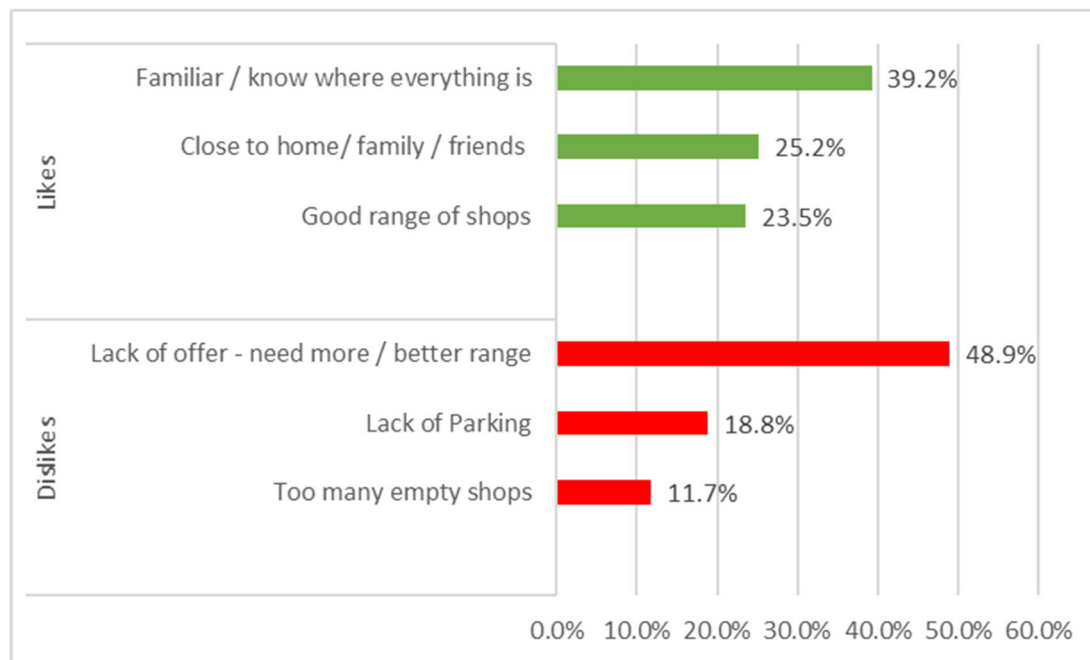
- 8.12 The centre is compact and easy to navigate, and generally benefits from good accessibility.
- 8.13 The majority of visitors to the centre arrive by car (76.1%). The High Street benefits from one-way traffic as a traffic-calming measure. Broad Street however has two-way moving traffic, and acts as the main route to the centre.

- 8.14 Free on-street parking is available along High Street and Broad Street, although it has a 2-hour time limit. The household survey identified that one of the top dislikes about the centre is the lack of parking (as identified by 18.8% of visitors) and that 42.2% of visitors stated that improving parking facilities would encourage them to visit the centre more often.
- 8.15 Busses stop along Broad Street, with services running regionally to Cardiff, Llantwit Major and Colcot Circular, as well as local services around Barry including Barry Island. Although not within the centre's boundary, Barry Station is located, at most, a 5-minute walk from Barry High Street, making it highly accessible by train. It is noted however that the household survey has shown that the arrival by public transport to the centre is very limited.
- 8.16 11.4% of visitors arrive to the centre by foot. Pedestrian movement is hindered by narrow pavements and the fact that the street is also car-dominated due to its narrow layout. Broad Street is wider but with crossing points only at the junctions of Island Road and Market Street. It would benefit from an additional crossing point located centrally between the existing ones.
- 8.17 The topography of High Street means that it is not particularly cycle friendly. No bike lanes were observed however cycle racks were observed along Broad Street.

Public Opinion

- 8.18 Results from the household survey identified the top “likes” and “dislikes” of the district centre, as seen below.

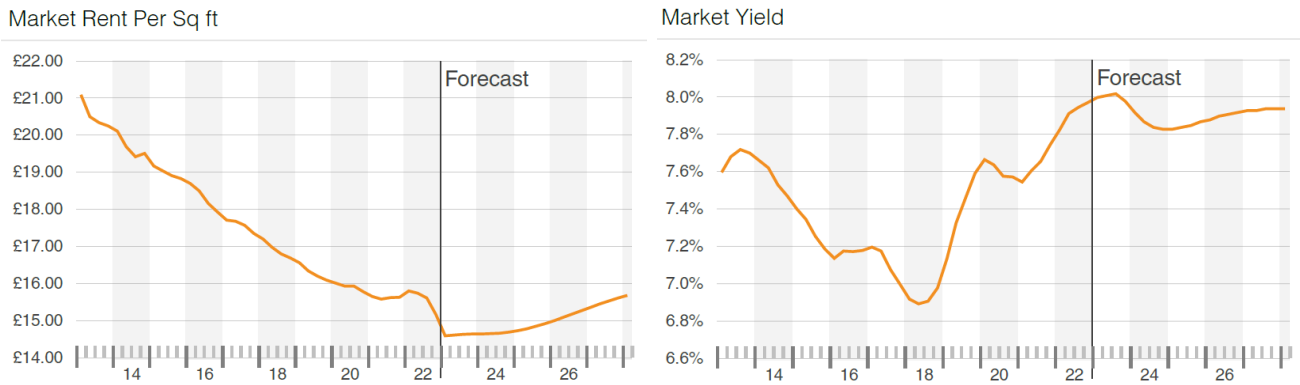
Figure 8.18.1 Barry High Street Public Opinion



Rents and Yields

8.19 The CoStar Retail Report 2023 identifies the market rent per square foot to be £14.64 and the market yield to be 8%.

Figure 8.19.1 Market rent per SF and market yield for Barry High Street



Source: CoStar Retail Report 2023

Centre Turnover

8.20 Barry High Street turns over £1.8m in convenience and comparison goods spend from the Study Area. This is driven by its convenience offer, with household survey not identifying a significant comparison draw. This makes the centre the lowest-trading district centre in the Council Area. However, as identified above, the centre's role is focused around its retail and leisure services, which will clearly add a considerably greater amount of turnover to the centre as a whole.

Figure 8.20.1 Barry High Street Turnover

Category	Centre Turnover (p/a) (from the Study Area)	% draw from the Inner Study Area
Convenience	£1.8m	0.5%
Comparison	-	-
Total Retail	£1.8m	

Commercial Demand

8.21 We have identified five operators that seek representation in the town of Barry (covering both High Street and Holton Road). This is shown in the table below.

Figure 8.21.1 Operator Requirement List for Barry

Occupier	Description	Size (min) sq m	Size (max) sq m
Aldi	Supermarket	1,700	2,000
Lidl	Supermarket	1,700	2,400
Pizza Hut Delivery	Pizza Delivery	60	200
Poundstretcher	Retail Value Store	560	2,800
Travelodge	Hotel	930	3,700

Source: The Requirement List (April 2023)

Summary of Key Issues

- 8.22 The centre's role is focused around its retail and leisure services, whilst its convenience and comparison offer is somewhat lacking, especially given its role as a district centre. Improving the choice and range of the overall offer with the centre would be beneficial.
- 8.23 Barry High Street is generally an attractive quaint district centre. However, the centre would benefit from public realm improvements and maintenance, both in terms of enhancing its environmental quality and removing impediments to pedestrian flow.
- 8.24 The centre also lacks green spaces and landscaping, and public seating. Opportunities should be explored to improve the overall public realm, albeit it is noted that the narrow urban gain could make this difficult.
- 8.25 Improving parking facilities have identified as a key concern among local visitors.
- 8.26 Whilst the centre is located close to the railway station and benefits from bus routes, the household survey has shown that the arrival by public transport to the centre is very limited. This is a missed opportunity.

9. Penarth District Centre Health Check

Description

- 9.1 Penarth district centre is the easterly most centre in the Vale of Glamorgan. With a total of 168 units, in terms of size, it is on par with Barry Holton Road Town Centre (160 units). The majority of the units are focused on Windsor Road and Glebe Street to the north of the centre, albeit a pocket of town centre uses is also present next to the Penarth railway station.

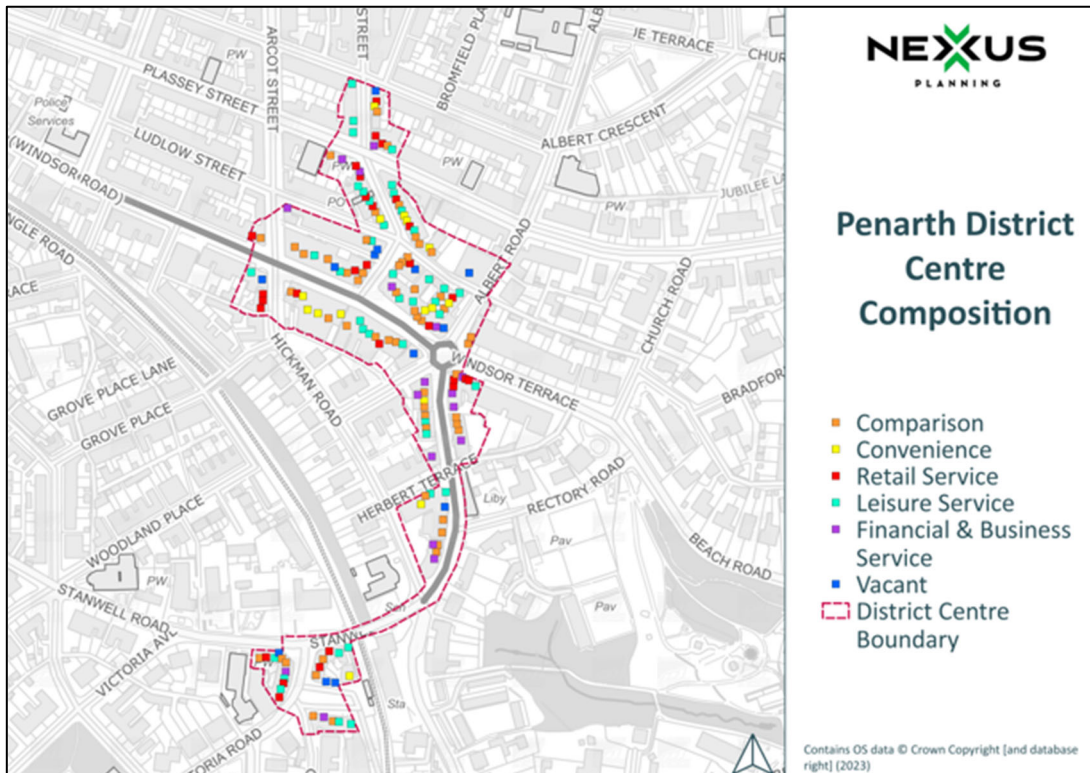
Figure 9.1.1 Photos of Penarth



Source: Nexus site visit (March 2023)

GOAD Composition and Vacancies

Figure 9.1.2 Penarth Composition Map

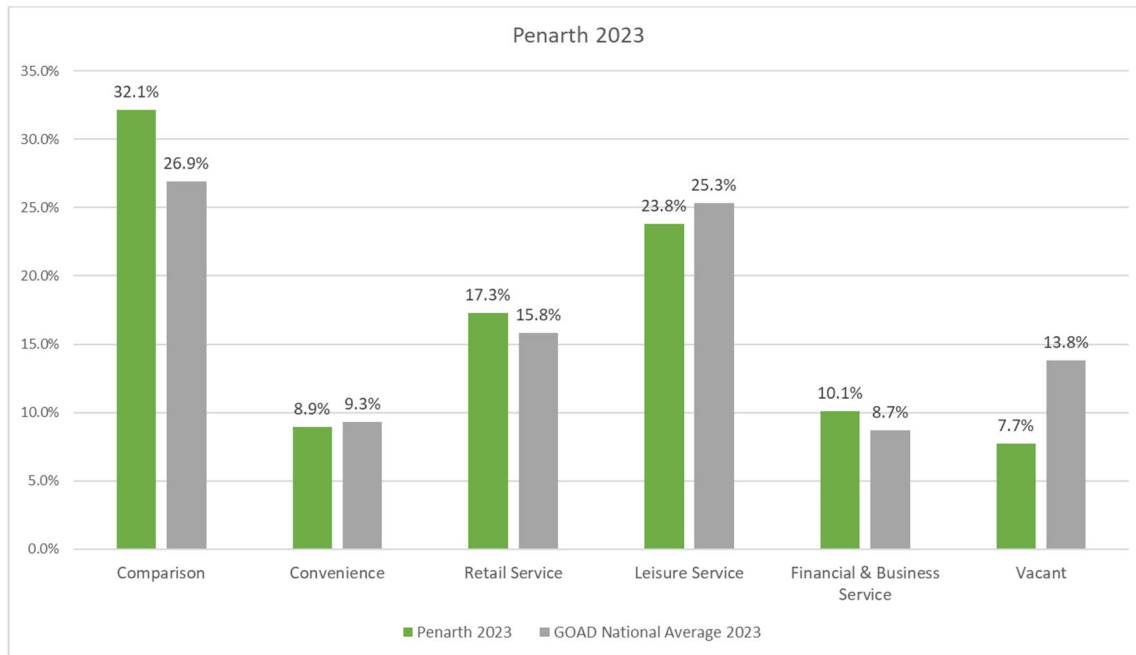


- 9.2 There are a total of 168 units in the centre. The overall offer is well rounded, albeit it is noted that the centre does not benefit from a larger supermarket.
- 9.3 The comparison offer consists of 54 units, which makes up 32.1% of the total offer, which is higher than the UK average (26.9%). These are primarily independent retailers, though a few national retailers are present, such as W H Smith, Bon Marche, Boots, along with charity shops such as Oxfam and Cancer Research UK. The comparison offer is diverse in nature.
- 9.4 8.9% (15 units) of total units are convenience, which is slightly lower than the UK average (9.3%). Of these units in Penarth, there is a small Co-op, Tesco Express and Sainsbury's Local, along with small independent convenience operators such as a cheese shop, two greengrocers, a newsagent, a butcher, a wine shop, two health food shops, zero waste shop and a sweet shop.
- 9.5 Services make up 52.4% (88 units) of the total offer, which is higher than the UK average (49.8%).
- a. Retail services make up 17.3% (29 units) of the total offer, which is just higher than the UK average of 15.8%. These units are primarily hairdressers and beauty salons, but dry cleaners, opticians shoe repairs, tailors, tattoo parlours, undertakers, and a travel agent are also present.
 - b. Leisure services make up 23.8% (40 units) of the total number of units, which is slightly below the UK average (25.3%). The leisure offer consists predominantly of independent operators, including restaurants, cafes, takeaways, and bars/pubs.
 - c. Financial & Business Services make up 10.1% (17 units), which is higher than the UK average (8.7%). The offer includes estate agents and banks, as well as others.
- 9.6 13 units (7.7% of the total offer) are vacant. This is well below the UK average of 13.8%, and there are no noticeable clusters.

Figure 9.6.1 Penarth Composition Table

Categories	Penarth 2023		UK Average 2023
	(#)	(%)	(%)
Comparison	54	32.1%	26.9%
Convenience	15	8.9%	9.3%
Services (Total)	86	51.2%	49.8%
Retail	29	17.3%	15.8%
Leisure	40	23.8%	25.3%
Financial & Business	17	10.1%	8.7%
Vacant	13	7.7%	13.8%
TOTAL	168	100%	100%

Figure 9.6.2 Penarth Composition Graph



Environmental Quality and Perception of Safety

- 9.7 Penarth is a traditional district centre, with the majority of the centre falling within the Penarth Conservation Area. The household survey identified that one of the top likes about the centre is its attractive environment (10.6%).
- 9.8 The centre is generally clean and litter-free throughout, and bins are readily provided. The building facades were relatively well maintained. However, in places, there was noticeable graffiti. The centre generally lacks green landscaping and seating areas, albeit these are present to some extent along Windsor Road. Some of the public realm features appear to be dated and there are some signs of lack of maintenance. The centre is also split into two separate parts, namely the main offer on Windsor Road and Glebe Street to the north of the centre, and a pocket next to the Penarth railway station. This segregated approach detracts from the overall environment and from creating a sense of place. Public realm improvements might unify these areas.
- 9.9 The centre is largely car-dominated which detracts from the overall environment. There are no pedestrianised areas.
- 9.10 It is noted that the household survey also identified a lack of public toilets within the centre.
- 9.11 The centre feels very safe. At the time of the visits, there were no noticeable signs of antisocial behaviour, albeit no visible CCTV was noted. The household survey did not identify any issues with security; and a nice atmosphere / friendly people is the feature of the centre visitors like the most (29.0%).

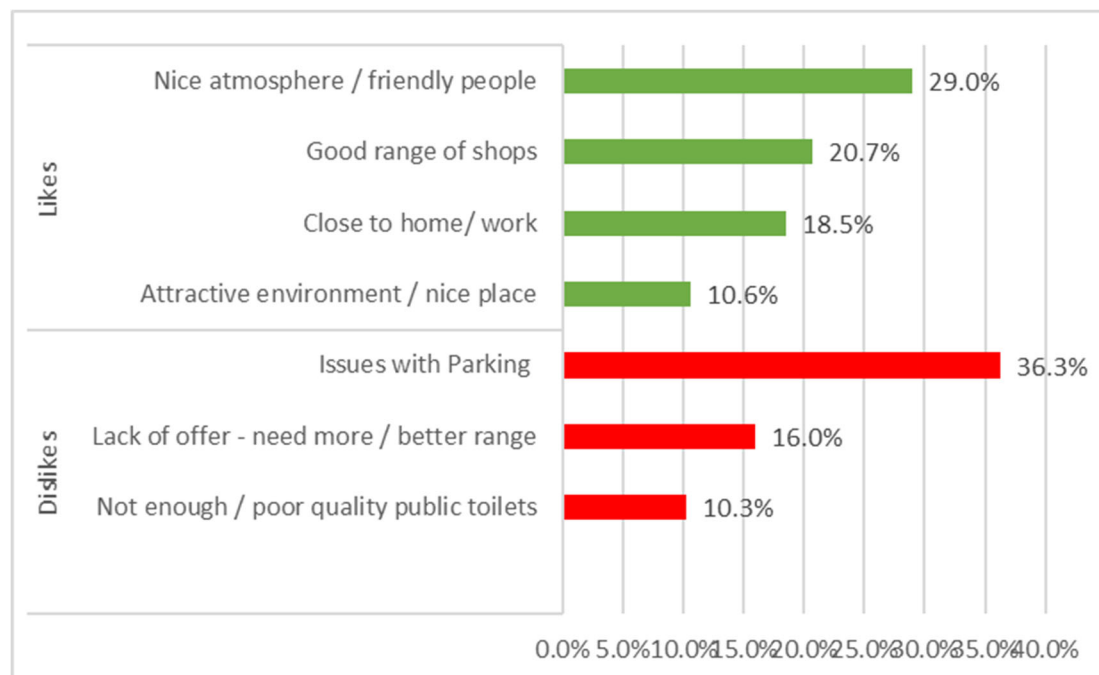
Accessibility and Pedestrian Flow

- 9.12 The majority of visitors to the centre arrive by car (67.4%). The only dedicated car park is located next to the railway station, albeit this is rather small. On-street parking is (in many cases) limited to one hour. The household survey identified that issues with parking is the top dislike about the centre (36.3%), with large numbers of respondents indicating that improving parking facilities would encourage them to visit the centre more often.
- 9.13 The centre is mostly linear and is easy to navigate. Large areas of the centre are subject to one-way traffic, which in turn provides traffic-calming measures and improves pedestrian safety by enabling easier crossing along these routes. Penarth town centre benefits from wide pavements, and regular crossing points along Windsor Road and around the roundabout at the east of Windsor.
- 9.14 Penarth district centre benefits from a railway station, and 7.1% of visitors to the centre arrive by train. Whilst the train station has a pocket of town centre uses around it, as we have already mentioned, these are not well connected to the main offer on Windsor Road and Glebe Street to the north of the centre.
- 9.15 There are bus stops along Windsor Road and Stanwell Road, providing regional services to Barry Dock, Dinas Powys and Cardiff as well as local services. 9.1% of visitors arrive to the centre by bus.
- 9.16 Some cycling racks are provided, though there are no cycle lanes in the centre (other than a small section along Arcot). There is also a public cycle hire scheme in Penarth, operated by OVO Hydro.

Public Opinion

- 9.17 Results from the household survey identified the top “likes” and “dislikes” of the centre, as seen below.

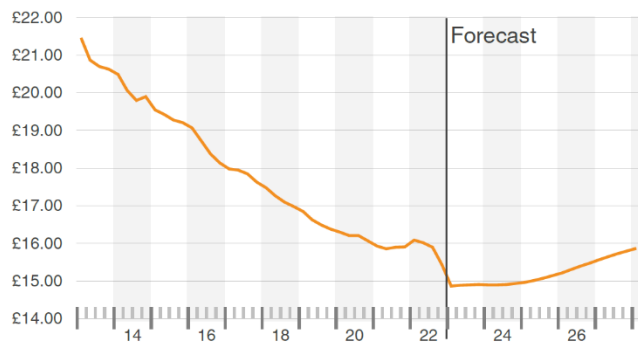
Figure 9.17.1 Penarth Public Opinion



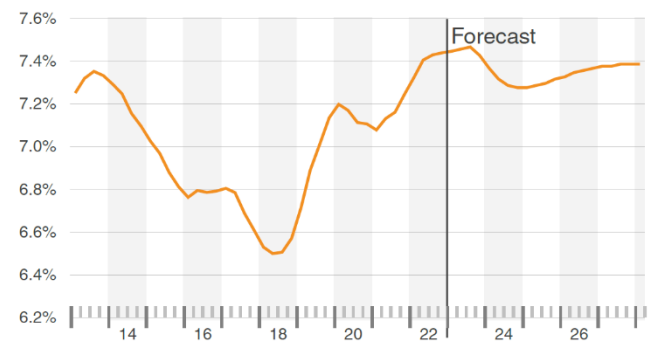
Rents and Yields

9.18 The CoStar Retail Report 2023 identifies the market rent per square foot to be £14.92 and the market yield to be 7.4%.

Figure 9.18.1 Market rent per SF and market yield for Penarth
Market Rent Per Sq ft



Market Yield



Source: CoStar Retail Report 2023

Centre Turnover

9.19 Penarth district centre turns over £42.0m of convenience and comparison goods spend from the Study Area, which makes it the third highest trading centre in the Council Area (after Barry Holton Road and Cowbridge district centres).

9.20 With £5.1m, the centre's convenience turnover is relatively low, especially given the size of the centre. The centre's biggest convenience competitors (based on residents of Zone 5) are Culverhouse Cross and Tesco Superstore at Terra Nova Way in Penarth which is out of centre, and stores in Cardiff.

9.21 Penarth district centre has the second highest comparison goods turnover (after Barry Holton Road town centre) with £36.9m of trade per annum. This is driven by small media, small households, and clothing & footwear goods. The centre's biggest comparison competitors (based on residents of Zone 5) are Culverhouse Cross and Cardiff.

Figure 9.21.1 Penarth Turnover

Category	Centre Turnover (p/a) (from the Study Area)	% draw from the Inner Study Area
Convenience	£5.1m	1.6%
Comparison	£36.9m	6.3%
Clothing & footwear	£6.5m	5.5%
Furniture goods	£3.3m	5.5%
DIY goods	£3.8m	7.8%
Electrical goods	£3.6m	4.4%
Small Household goods	£7.0m	6.8%
Small Media	£6.4m	11.7%
Chemist goods	£4.5m	13.8%
Recreation goods	£1.9m	2.2%
Total Retail	£42.0m	

Commercial Demand

9.22 We have identified five operators that seek representation in Penarth. This is shown in the table below.

Figure 9.22.1 Operator Requirement List for Penarth

Occupier	Description	Size (min) sq m	Size (max) sq m
Aldi	Supermarket	1,700	2,000
Lidl	Supermarket	1,700	2,400
M&S Food	British Multinational Retailer	1,200	2,300
Poundstretcher	Retail Value Store	560	2,800
Travelodge	Hotel	920	3,700

Source: The Requirement List (April 2023)

Summary of Key Issues

- 9.23 The overall offer of Penarth district centre is well rounded, albeit an introduction of a medium to the larger supermarket could be beneficial.
- 9.24 Further improvements are necessary to build on its character and create a stronger sense of place. As such, further investment into public realm and maintenance would be beneficial. Some pedestrianisation may be beneficial to address existing car dominance. Unification of the two separate parts of the centre (namely the main offer on Windsor Road and Glebe Street to the north of the centre, and a pocket next to the Penarth railway station) would also be highly desirable.
- 9.25 The household survey identified issues with parking. This could be remedied by improving parking provisions and/or by introducing measures to encourage alternative means of transport to decrease reliance on car travel.

10. Cowbridge District Centre Health Check

Description

- 10.1 Cowbridge is an attractive traditional historic centre located in the western part of the Council area. It is linear in nature running southeast to northwest along High Street. There are a total of 149 units in the centre, which makes it the third largest centre in the Council area (after Penarth and Barry Holton Road, which are similar in size to each other).

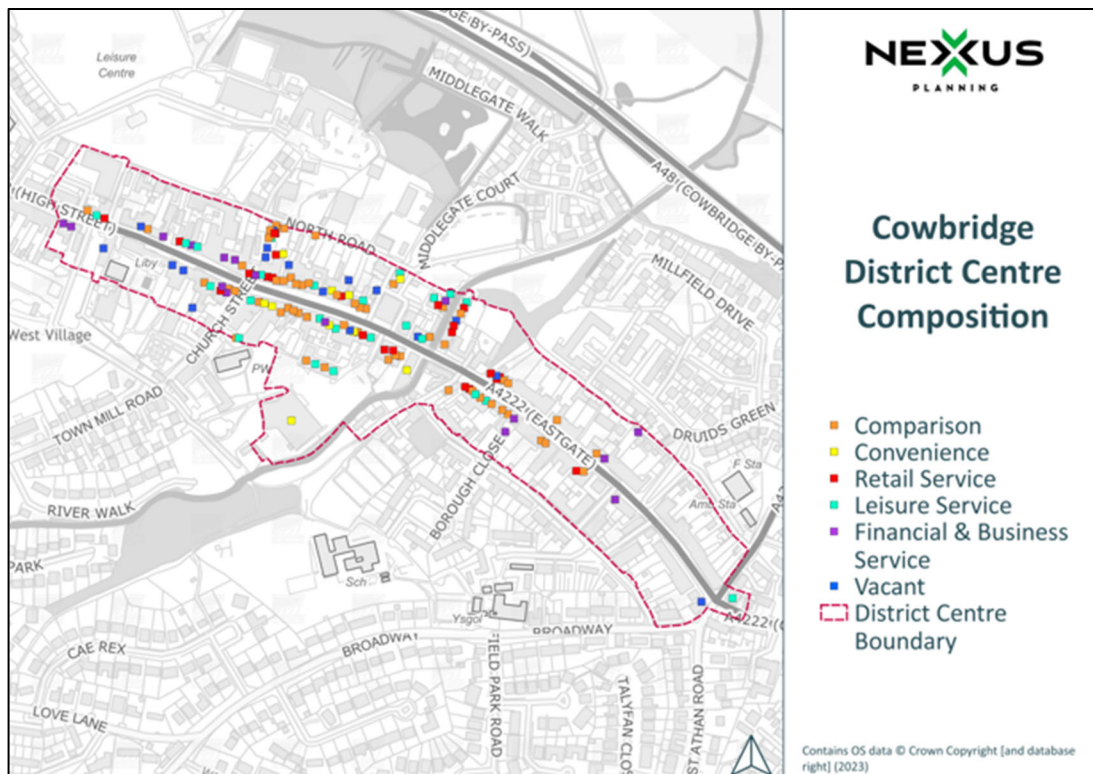
Figure 10.1.1 Photos of Cowbridge



Source: Nexus site visit (March 2023)

GOAD Composition and Vacancies

Figure 10.1.2 Cowbridge Composition Map

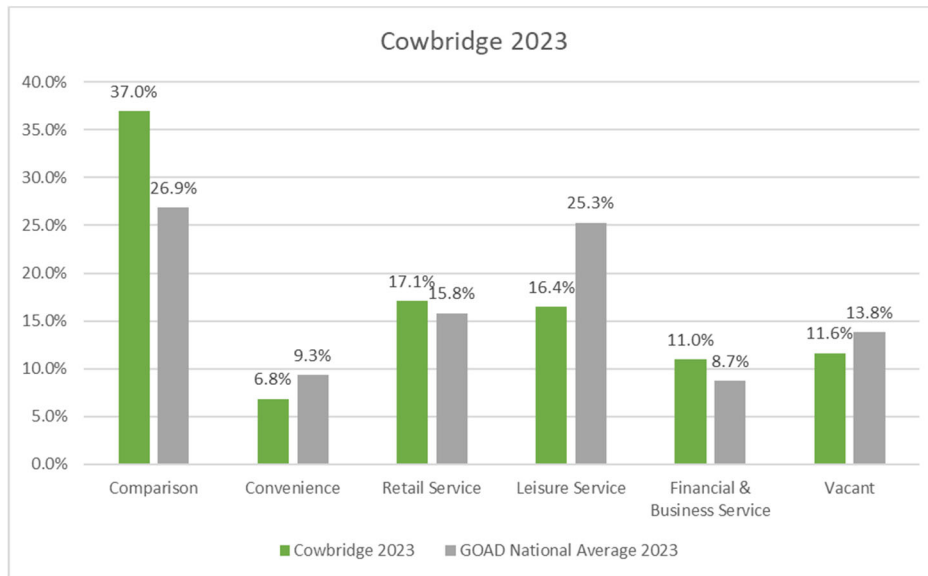


- 10.2 There are a total of 145 units within the centre. The centre has a relatively good mix of facilities. It has a strong comparison offer and to some extent convenience offer, but its leisure offer appears to be limited for the size of the centre. The household survey noted that 51.6% of visitors to the centre stated that improving the choice and range of the offer would encourage them to visit the centre more often.
- 10.3 The comparison goods offer consists of 54 units, which makes up 37.2% of the total offer, which is significantly higher than the UK average (26.9%). The offer is a diverse and is made up primarily of independent retailers.
- 10.4 6.9% (10 units) of total units offer convenience goods, which is lower than the UK average (9.3%). However, the offer is anchored by a large Waitrose, and includes a Tesco Express, other small convenience stores, butchers and delis. The Waitrose store is one of the top-performing stores in the Council area. As such, overall, the convenience offer is considered to be adequate in qualitative terms.
- 10.5 Services make up 44.1% (64 units) of the total offer, which is lower than the UK national average (49.8%)
- a. Retail services make up 16.6% (24 units) of the total offer, which is higher than the UK average of 15.8%. These units are primarily hairdressers, barbers and beauty salons.
 - b. Leisure services make up 16.6% (24 units) of the total number of units, which is significantly lower than the UK average (25.3%). The leisure offer consists of independent restaurants, cafes and there are five public houses.
 - c. Financial & Business Services make up 11.0% (16 units), which is higher than that of the UK average (8.7%).
- 10.6 17 units (11.7% of the total offer) are vacant. This is below the UK average (13.8%). The vacant units are pepper-potted around the centre, and there are no noticeable clusters.

Figure 10.6.1 Cowbridge Composition Table

Categories	Cowbridge 2023		UK Average 2023
	(#)	(%)	(%)
Comparison	54	37.2%	26.9%
Convenience	10	6.9%	9.3%
Services (Total)	64	44.1%	49.8%
<i>Retail</i>	24	16.6%	15.8%
<i>Leisure</i>	24	16.6%	25.3%
<i>Financial & Business</i>	16	11.0%	8.7%
Vacant	17	11.7%	13.8%
TOTAL	145	100%	100%

Figure 10.6.2 Cowbridge Composition Graph



Environmental Quality and Perception of Safety

- 10.7 The centre benefits from an attractive historic environment. It lies in the Cowbridge Conservation Area, with many listed buildings present. The household survey identified that one of the top likes about the centre is its nice atmosphere (27.3%) and attractive environment (18.8%).
- 10.8 The building facades are attractive and well-kept. Many local businesses have installed street planters and other decorations outside of their own shops. Cowbridge was tidy at the time of our visits, and a good number of bins were observed. There was also no evidence of graffiti.
- 10.9 Whilst the wider public realm in Cowbridge is pleasant, the main street lacks green space and landscaping, as well as setting areas. It is however noted that Cowbridge Physic Garden is located outside Cowbridge Library and the Old Town Hall.
- 10.10 The overall quality of the environment decreases eastwards of the river due to the lack of town centre operators beyond that point. The river is also a natural asset of the centre but currently appears to be 'hidden' and underutilised.
- 10.11 The centre feels very safe. At the time of the visits, there were no noticeable signs of antisocial behaviour, although no visible CCTV was noted. The household survey did not identify any issues with security; and nice atmosphere / friendly people is the feature of the centre visitors like the most (27.3%).

Accessibility and Pedestrian Flow

- 10.12 The centre is compact and easy to navigate, and generally benefits from good accessibility.
- 10.13 The vast majority of visitors to the centre arrive by car (92.6%). There is a large surface car park, Cowbridge Car Park, that is free for two hours and on Sundays, with the maximum charge being £6 for a day's parking. The car park at Waitrose is also free for two hours, and there is a high number of on-street parking spaces that are free for an hour³³. The household

³³ There are also additional parking areas located in close proximity to the centre boundary along The Butts.

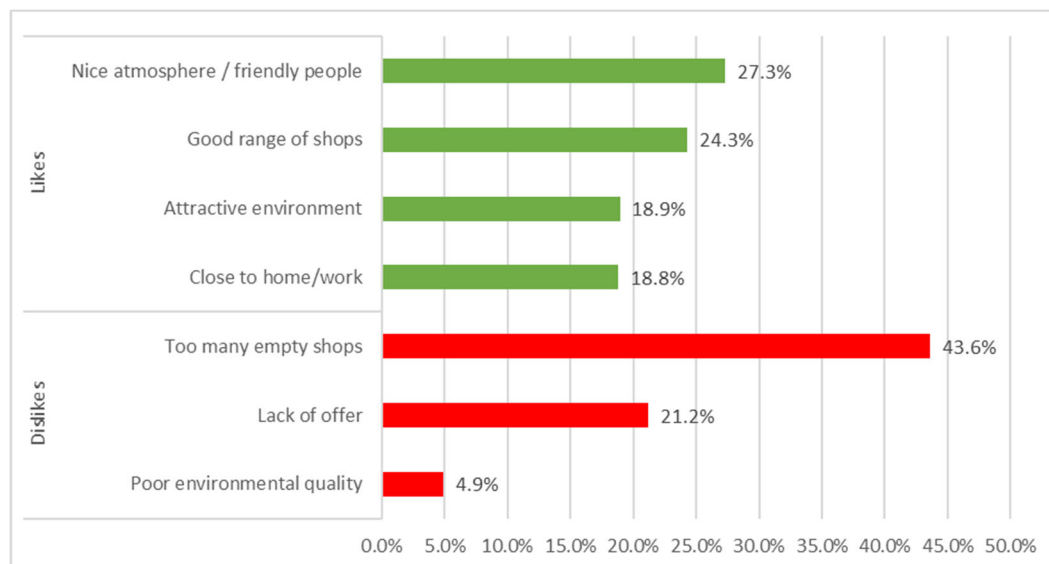
survey identified that 52.8% of visitors stated that improving parking facilities would encourage them to visit the centre more often.

- 10.14 The wide pavements, crossings and linear nature of the centre make it pedestrian friendly. There was some street signage observed, however, the signage could still be improved.
- 10.15 There are no cycle lanes in Cowbridge, and only a few cycle racks were observed. 2.8% of visitors arrive to the centre by bicycle.
- 10.16 Busses stop centrally on High Street, and provide services to Cardiff, Talbot Green, Porthcawl and Llantwit Major. Only 1.0% of visitors arrive to the centre by bus.

Public Opinion

- 10.17 Results from the household survey identified the top “likes” and “dislikes” of the town centre, as seen below.

Figure 10.17.1 Cowbridge Public Opinion

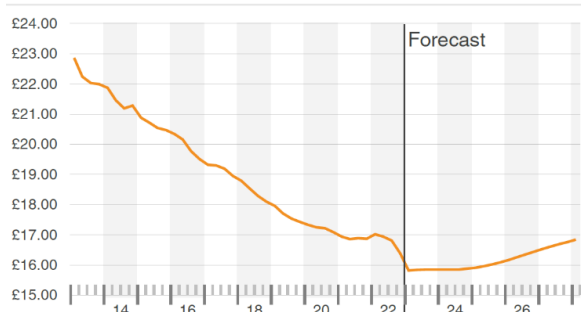


Rents and Yields

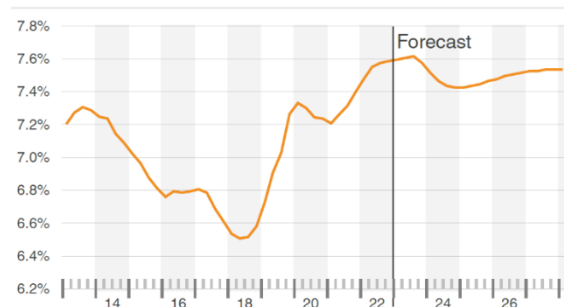
- 10.18 The CoStar Retail Report 2023 identifies the market rent per square foot to be £15.88 and the market yield is 7.6%.

Figure 10.18.1 Market rent per SF and market yield for Cowbridge

Market Rent Per Sq ft



Market Yield



Source: CoStar Retail Report 2023

Centre Turnover

- 10.19 Cowbridge district centre turns over £45.7m per annum in convenience and comparison goods from the Study Area, which makes it the second highest trading centre in the Council Area. The centre has a relatively high convenience turnover which is primarily driven by the Waitrose store. The comparison turnover is £19.1m which is driven by clothing & footwear, small media and small household goods. The centre's biggest comparison competitors (based on residents of Zone 4) are Bridgend, Cardiff and Culverhouse Cross.

Figure 10.19.1 Cowbridge Turnover

Category	Centre Turnover (p/a) (from the Study Area)	% draw from the Inner Study Area
Convenience	£26.6m	8.3%
Comparison	£19.1m	3.5%
Clothing & footwear	£5.5m	4.6%
Furniture goods	£0.5m	0.8%
DIY goods	£0.8m	1.6%
Electrical goods	£0.0m	0.0%
Small Household goods	£4.2m	4.0%
Small Media	£3.0m	5.5%
Chemist goods	£3.2m	9.9%
Recreation goods	£2.0m	2.3%
Total Retail	£45.7m	

Commercial Demand

- 10.20 We have identified four operators that seek representation in Cowbridge. This is shown in the table below.

Figure 10.20.1 Operator Requirement List for Cowbridge

Occupier	Description	Size (min) sq m	Size (max) sq m
Aldi	Supermarket	1,700	2,000
JoJo Maman Bebe	Mother & Baby Brand	70	140
Lidl	Supermarket	1,700	2,400
Neptune	Interior, Kitchen and Garden Furniture	460	930

Source: The Requirement List (April 2023)

Summary of Key Issues

- 10.21 Cowbridge District Centre has a relatively strong comparison and convenience offer, but its leisure offer appears to be limited for the size of the centre. It is noted that the market share analysis shows that residents of Zone 4 (Llantwit Major and Cowbridge) are the least satisfied with the overall leisure provisions. Improving the choice and range of the overall offer with the centre would be beneficial.

- 10.22 Whilst Cowbridge has an attractive and pleasant environment, it would benefit from future improvements and maintenance, especially in relation to increasing green space and landscaping. The centre would also benefit from better utilisation of the river as a public realm asset.
- 10.23 Improving parking facilities would encourage more visitors into the centre. Furthermore, introducing measures to encourage alternative means of transport to decrease reliance on car travel would also help address the issue.

11. Llantwit Major District Centre Health Check

Description

11.1 Llantwit Major is the smallest district centre in the Vale of Glamorgan, with a total of 89 units. The retail core is focused around the Pound Field pedestrianised area which hosts purpose-built retail units, as well as the northern side of Boverton Road.

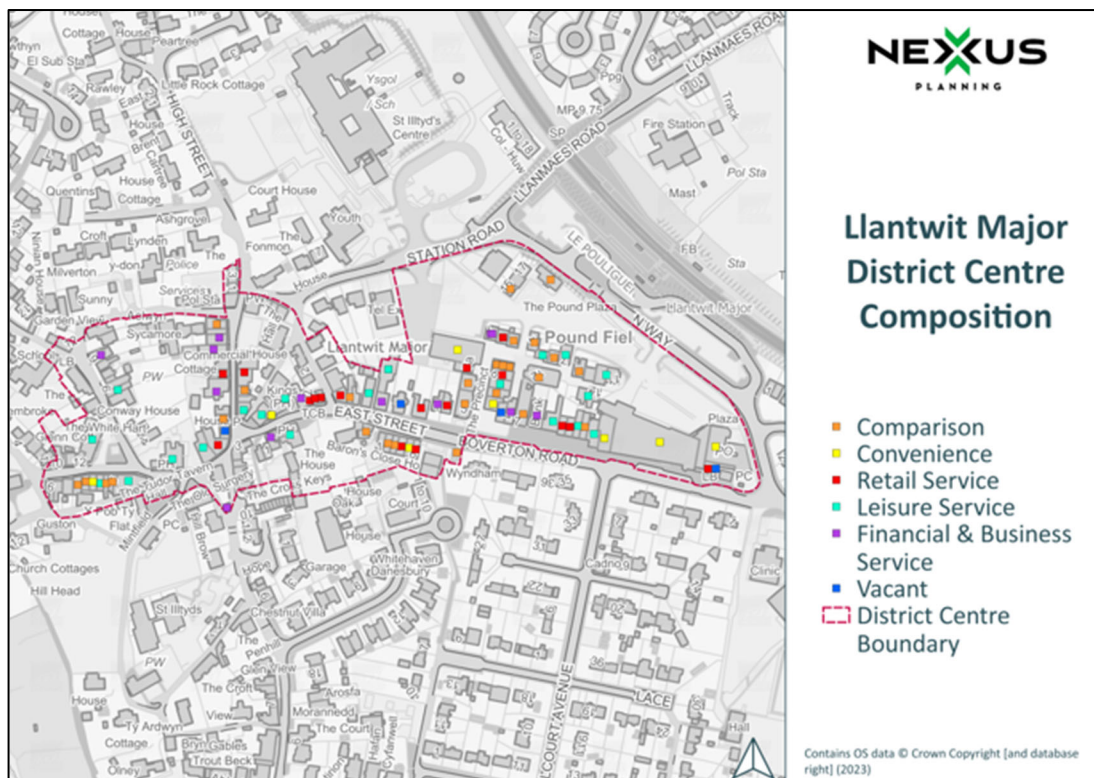
Figure 11.1.1 Photos of Llantwit Major



Source: Nexus site visit (March 2023)

GOAD Composition and Vacancies

Figure 11.1.2 Llantwit Major Composition Map

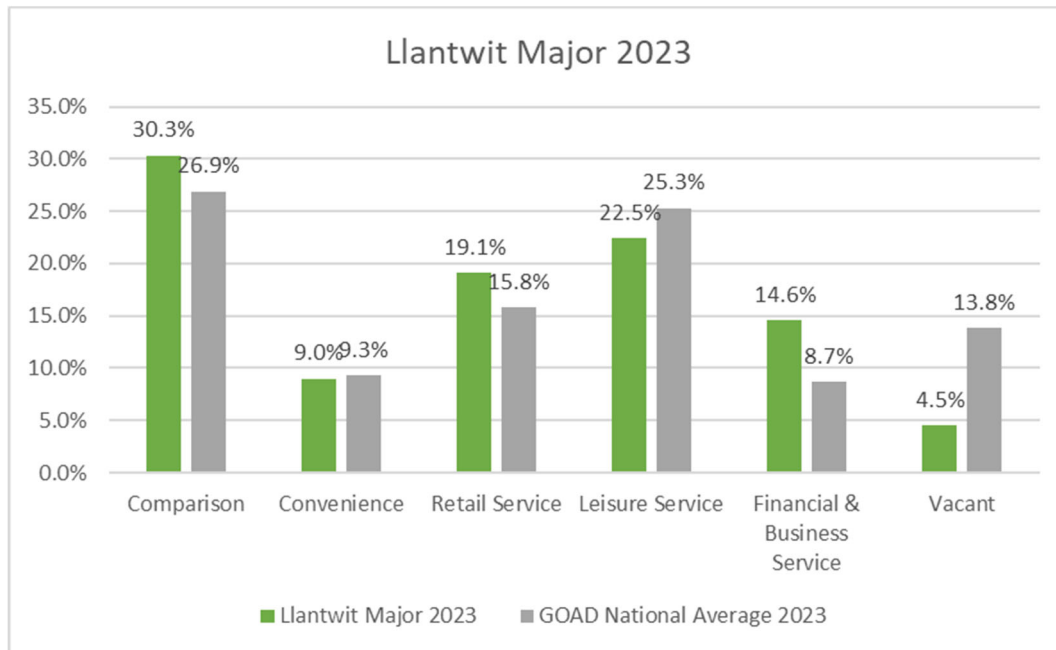


- 11.2 There are a total of 89 units within the centre. The centre's role is focused around services, albeit this is mostly due to high proliferation of financial and business services, whereas retail and leisure services are somewhat lacking. Whilst its comparison offer is adequate for the centre of its size, its convenience offer is quite limited. The household survey noted that 55.3% of visitors stated that improving the choice and range of the offer within the centre would encourage them to visit more.
- 11.3 The comparison offer consists of 27 units, which makes up 30.3% of the total offer, which is higher than the UK average (26.9%). These are primarily independent retailers, though a few national retailers are present (namely Boots, Interflora and British Red Cross). The comparison offer is diverse, especially given the size of the centre.
- 11.4 9.0% (8 units) of total units are convenience, which is similar to the UK average (9.3%). This includes three national retailers (Co-op, Nisa and Spar), and there are also a butchers, two bakers (Filco and Church Street Bakery) and an ice cream shop. The household survey shows that the key dislike about the centre is the lack of supermarkets (35.7%).
- 11.5 Services make up 56.2% (50 units) of the total offer, which is higher than the UK average (49.8%).
- Retail services make up 19.1% (17 units) of the total offer, which is higher than the UK average of 15.8%. These units are primarily hairdressers, barbers and beauty salons. However, there are also three opticians, two tattoo artists, a post office, a travel agent and a dry cleaner.
 - Leisure services make up 22.5% (20 units) of the total number of units, which is slightly lower than the UK average. The leisure offer consists mainly of independent restaurants, cafes and there are five public houses in Llantwit Major.
 - Financial & Business Services make up 14.6% (13 units), which is higher than that of the UK average (8.7%). These include banks and estate agents, as well as others.
- 11.6 Only four units (4.5% of the total offer) are vacant, which is significantly below the UK average (13.8%). There are no obvious clusters of these.

Figure 11.6.1 Llantwit Major Composition Table

Categories	Llantwit Major 2023		UK Average 2023
	(#)	(%)	(%)
Comparison	27	30.3%	26.9%
Convenience	8	9.0%	9.3%
Services (Total)	50	56.2%	49.8%
<i>Retail</i>	17	19.1%	15.8%
<i>Leisure</i>	20	22.5%	25.3%
<i>Financial & Business</i>	13	14.6%	8.7%
Vacant	4	4.5%	13.8%
TOTAL	89	100%	100%

Figure 11.6.2 Llantwit Major Composition Graph



Environmental Quality and Perception of Safety

- 11.7 Llantwit Major is generally a pleasant centre, with well-kept facades and some street planters, and it is reasonably tidy with little litter and no noticeable graffiti.
- 11.8 However, there is a notable lack of unique/ exciting architectural features and it has a dated public realm. The layout of the pedestrianised area does not aid legibility, which further takes away from the sense of place. The centre would benefit from public realm improvements and rationalisation of its layout.
- 11.9 The centre generally feels safe and pleasant. At the time of the visits, there were no noticeable signs of antisocial behaviour. The household survey did not identify any issues with security, and a nice atmosphere / friendly people is one of the main features most liked about the centre by its visitors (19.3%).

Accessibility and Pedestrian Flow

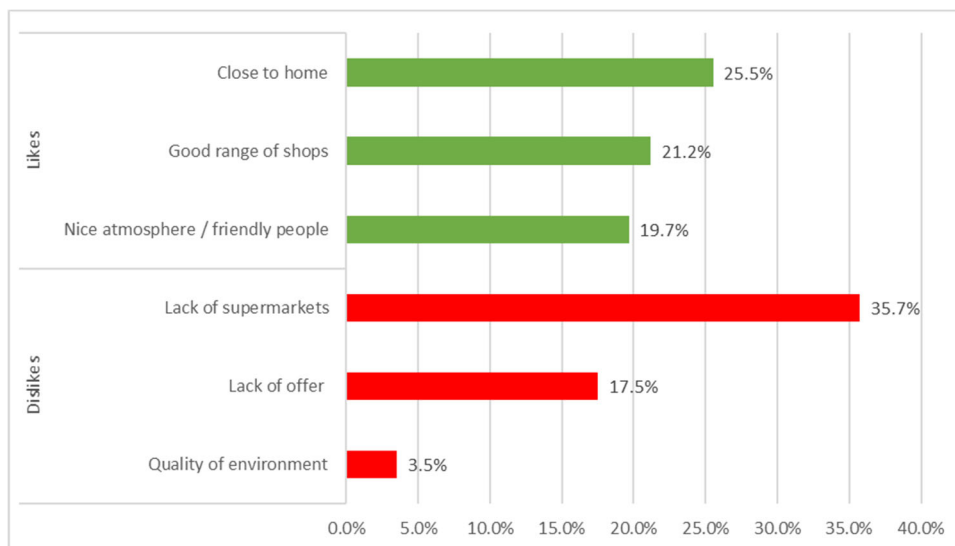
- 11.10 The centre is relatively compact. The retail core is focused to the east of the centre, concentrated around the Pound Field pedestrianised area and the northern side of Boverton Road which has a wide pavement. Whilst this area is not particularly large, the overall pedestrian legibility and wayfinding are currently lacking. The western part of the centre is affected by winding streets with very narrow payments, which in most cases do not lead to any town centre uses. The fact that the town centre boundary includes areas that are unrelated to the retail core, gives a false sense of the centre's size.
- 11.11 Most visitors to the centre arrive by car (71.8%). The northern part of the centre hosts a large free long-stay car park. Several on-street parking spaces along Boverton Road are free for two hours. 37.7% of respondents to the household survey stated that improving parking arrangements would encourage them to visit the centre more often.

- 11.12 Llantwit Major railway station and bus stop are adjacent to the centre’s northern boundary. However, the link between these and the heart of the centre is not apparent and hence could be improved. The household survey has shown that the arrival by public transport to the centre is very limited (2.0%).
- 11.13 23.0% of visitors arrive to the centre by foot.
- 11.14 The household survey has shown that arrival by bicycle to the centre is very limited (3.2%). Cyclability in Llantwit Major could be improved. At the time of our visits, no cycle lanes were observed, although there were a few cycle racks.
- 11.15 Overall, the centre would benefit from a rationalisation of its layout to improve legibility, and a better connection to its railway/bus stations.

Public Opinion

- 11.16 Results from the household survey identified the top “likes” and “dislikes” of the centre, as seen below.

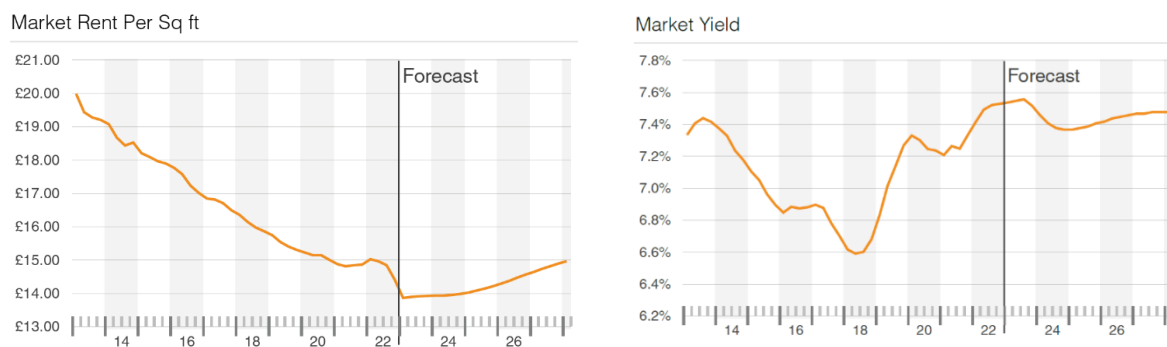
Figure 11.16.1 Llantwit Major Public Opinion



Rents and Yields

- 11.17 The CoStar Retail Report 2023 identifies the market rent per square foot to be £13.92 and the market yield to be 7.5%.

Figure 11.17.1 Market rent per SF and market yield for Llantwit Major



Source: CoStar Retail Report 2023

Centre Turnover

- 11.18** Llantwit Major district centre turns over £17.5m of convenience and comparison goods per annum from the Study Area. This is driven almost equally by its convenience offer and its comparison offer, with a turnover of £8.8m and £8.7m respectively. The comparison offer is focused by recreation and chemists goods, as well as small media. The centre's biggest comparison competitors (based on residents of Zone 4) are Bridgend, Cardiff, Culverhouse Cross, Cowbridge town centre, and Barry's out of centre locations.
- 11.19** The centre's convenience turnover is relatively low. The centre's biggest convenience competitors (based on residents of Zone 4) are Cowbridge district centre (its Waitrose), Bridgend, and Barry's out of centre locations.

Figure 11.19.1 Llantwit Major Turnover

Category	Centre Turnover (p/a) (from the Study Area)	% draw from the Inner Study Area
Convenience	£8.8m	2.7%
Comparison	£8.7m	1.5%
Clothing & footwear	£0.5m	0.5%
Furniture goods	£0.6m	0.9%
DIY goods	£0.1m	0.1%
Electrical goods	£1.0m	1.2%
Small Household goods	£0.0m	0.0%
Small Media	£1.6m	3.0%
Chemist goods	£3.0m	9.2%
Recreation goods	£1.9m	2.2%
Total Retail	£17.5m	

Commercial Demand

- 11.20** We have identified three operators that seek representation in Llantwit Major. This is shown in the table below.

Figure 11.20.1 Operator Requirement List for Llantwit Major

Occupier	Description	Size (min) sq m	Size (max) sq m
Domino's Pizza	American Pizza Restaurant Chain	88	140
Lidl	Supermarket	1,700	2,400

Source: The Requirement List (April 2023)

Summary of Key Issues

- 11.21** The centre's role is focused around services, albeit leisure services are somewhat lacking. Whilst its comparison offer is adequate for the centre of its size, its convenience offer appears to be lacking.
- 11.22** An introduction of a medium to larger supermarket would be beneficial.

- 11.23 Improvements to the overall range of the centre's offer, especially in relation to leisure services, would also be recommended. It is noted that the market share analysis shows that residents of Zone 4 (Llantwit Major and Cowbridge) are the least satisfied with the overall leisure provisions.
- 11.24 The centre also seems to lack character and opportunities to give the centre a better sense of identity should be explored.
- 11.25 The centre would benefit from a rationalisation of its layout to improve legibility and a better connection to its railway/bus stations. Improving parking facilities would encourage more visitors into the centre. Furthermore, introducing measures to encourage alternative means of transport to decrease reliance on car travel would also help address the issue.

12. Policy & Proposals

Introduction

12.1 Taking account of extant planning policy at both the local and national level, and the evidence gathered through this Study, this section provides guidance to inform the Replacement Local Development Plan ('RLDP') on the following matters:

- a. The hierarchy of centres;
- b. The spatial extent of centres; and
- c. Recommended planning policy approach.

12.2 We address each of these tasks in turn below.

The Retail Hierarchy

12.3 In Sections 7-11, we set out a detailed health-check of the Town and four District Centres (namely Barry Holton Road Town Centre; Barry High Street / Broad Street District Centre; Cowbridge District Centre; Llantwit Major District Centre; Penarth District Centre). Together with Local and Neighbourhood Centres, these comprise the current retail hierarchy in the Vale of Glamorgan as defined by Policy MG12 of the Adopted Plan and its associated Proposals Map.

12.4 Our work has involved analysing the health of town and district centres (only) under a series of checks specified in Section 13 of TAN4, as well as understanding market shares and qualitative likes and dislikes deriving from a widespread household telephone survey. Alongside this work, we have examined, in Section 5, a series of quantitative assessments to understand what, if any, gaps there are in local retail and leisure provision. The culmination of this work allows us to recommend an appropriate hierarchy of centres for the Council area, taking into account both present circumstances, and the Council's wider plan-making aims and objectives.

12.5 By way of background, when it comes to identifying a retail hierarchy, Paragraph 4.3.10 of Planning Policy Wales (2021) identifies that local planning authorities should define a network and hierarchy of centres for the purposes of retail planning. Of note, this retail hierarchy is different to the settlement hierarchy which is also required to be defined separately.

12.6 The most relevant parts of Planning Policy Wales (2021) explain that:

- 4.3.10 *Planning authorities should establish a hierarchy of retail and commercial centres in their development plan strategy, identifying boundaries on the proposals map.*
- 4.3.11 *Using locally defined definitions, planning authorities should identify and categorise retail and commercial centres by the functions they fulfil, consider their future roles, and recognise opportunities to support Welsh Government retail and commercial centre objectives.*
- 4.3.12 *When developing a hierarchy, account should be taken of the size, scale, form, function and location of the retail and commercial centres within an area. The planning authority should consider the characteristics of each type of centre so they can be consistently categorised. For example, this could be the range of uses present or the extent of the catchment area. The hierarchy should distinguish between higher order centres which have a wider range of uses and larger catchment areas, and lower order centres which are important to communities for day-to-day needs.*

12.7 This advice largely echoes the earlier guidance set out in Section 4 of TAN4 (2016) where that document describes how a retail hierarchy should be composed. We do not, therefore, repeat its content here. Usefully though, TAN4 does provide further guidance on the use of a retail hierarchy at Paragraph 4.5, as follows:

- 4.5 *Once the hierarchy has been established, appropriate policies may be developed for different types of retail and commercial centre. These will primarily relate to changes of use of existing buildings and how flexible a local planning authority wishes to be in dealing with such applications, in accordance with their retail strategy and how they foresee retail and commercial centres developing in the future.*

12.8 Building on this guidance, we think it is helpful to quickly examine some of the purposes of defining a hierarchy of centres. Symbolically, it is a signal to investors as to where the Council is looking to provide for future growth. But in more practical planning terms, it is also a key component of the ‘impact’ and ‘sequential’ tests in decision-making for town centre uses. We consider this further in the section on Plan Policy below, but in brief, the higher up in the hierarchy a centre is, the more varied you might expect its range of town centre uses to be, and the more resilient and welcoming of new developments within, or close by, its centre it might be. More importantly still, the hierarchy determines how the sequential test is applied under a ‘town centre first’ regime. By way of example, a proposal for an out-of-centre foodstore nearby a Local Centre would be expected to pass the test of having first examined the availability, suitability and viability of central or edge-of-centre sites in nearby higher-order centres (i.e. Town and District Centres).

12.9 Turning specifically to the position in the Vale of Glamorgan Council area, the adopted Local Development Plan (2017) has a specified retail hierarchy set out in Policy MG12, which is as follows:

Figure 12.9.1 Existing Retail Hierarchy

Hierarchy	Centre/s
Town Centres	<ul style="list-style-type: none"> • Barry (Holton Road)
District Centres	<ul style="list-style-type: none"> • Barry (High Street/Broad street) • Cowbridge • Llantwit major • Penarth
Local Centres	<ul style="list-style-type: none"> • Barry: Main Street, Cadoxton; Vere Street, Cadoxton; Park Crescent; Barry Road, nr. Cadoxton; Upper Holton Road • Dinas Powys: Cardiff Road; Dinas Powys village centre • Penarth: Cornerswell Road • Rhoose: Fontygary Road • St Athan: The Square
Neighborhood Centres	<ul style="list-style-type: none"> • Barry: Bron-y-Mor; Cwm Talwg; Gibbonsdown Centre; Park Road • Boverton • Dinas Powys: Camms Corner; Castle Court/The Parade • Font-y-Gary: Adenfield Way • Llantwit Major: Crawshay Drive • Penarth: Pill Street; Tennyson Road

- 12.10 Having established the position in the adopted Plan, it is first relevant to consider whether the groupings used remain appropriate i.e. Town Centres, District Centres, Local Centres and Neighbourhood centres. Planning Policy Wales states at para 4.3.2 as follows:
- *4.3.2 Retail and commercial centres should be identified in development plans and include established city, town, district, local, village and neighbourhood centres, which provide a range of shopping, commercial and leisure opportunities as well as places of employment, education, civic identity and social interaction.*
- 12.11 However, neither Planning Policy Wales nor TAN4 specifies the definition for each tier of a suggested retail hierarchy. TAN4 does however provide the following guidance.
- *4.2 Higher order retail and commercial centres need to be accessible to a large number of people, and the scale and diverse range of uses present will reflect the needs of a population that is normally greater than the local community. Higher order centres are typically characterised by combinations of shops, offices, financial & professional services, food and drink establishments, hotels, education facilities, entertainment and leisure, non residential institutions as well as residential.*
 - *4.3 Lower order centres are characterised by smaller scale provision and fewer uses with the intention of primarily serving the needs of a local community. Lower order centres will typically include shops, financial & professional services, food and drink, and non residential institutions of an appropriate scale, but depending on the centre may include other uses.*
- 12.12 It is therefore for each Council in Wales to suggest its own hierarchy titles with corresponding definitions.
- 12.13 In light of this, and also the findings of our study in general, we are content that the titles used by Vale of Glamorgan Council remain broadly appropriate. It is noted however that the term “village centre” is not used.
- 12.14 Beyond titles, it is also important to define the role and purpose of centres at each tier of the hierarchy. This is specified at Paragraph 4.3.4 of PPW.
- *4.3.4 Retail and commercial centres are central to community activity and local prosperity and in order to plan for them effectively it is important to understand their function, roles and relationships.*
- 12.15 The adopted Plan does not currently do this, and we would recommend to the Council that a suitable definition is added to each of the three tiers of the hierarchy to assist with expectations around the future role and function of each centre, and how this differs between different tiers.
- 12.16 Having assessed only the top 2 tiers (town and district centres) within the current hierarchy, we suggest wording such as the following to describe the role of each tier of the hierarchy. We discuss this further under ‘Development Management Policies’ below.

Figure 12.16.1 Potential Definitions for the Role of each Tier of the Retail Hierarchy

Hierarchy	Role
Town Centres	Provides (or has the potential to provide) a range of shops, services, businesses, cultural, leisure and community facilities to a significant hinterland which includes smaller neighbouring towns or a number of suburbs.
District Centres	Provides (or has the potential to provide) a range of shops, services, businesses and community facilities to a hinterland which includes neighbouring villages or a few surrounding suburbs.
Local Centres	Provides (or has the potential to provide) essential shops and services to a surrounding community including nearby villages and hamlets.
Neighbourhood Centres	Provides (or has the potential to provide) essential shops and services to its immediate residential area.

12.17 Having considered the title, role and function of the retail hierarchy, we move on next to consider whether the centres of the current retail hierarchy (as set out in Figure 12.9.1) are appropriately placed. In keeping with guidance elsewhere in the UK, there is no set methodology for defining a retail hierarchy in PPW or TAN 4. We have therefore utilised our empirical evidence to assess a range of criteria that, we feel, provides a suitable basis for supporting the proposed hierarchy. The figure below provides an assessment of each of the five centres which have been subject to consideration under this Study. Descriptors that have been chosen include the number of units, comparison and convenience goods market share (from our survey work), average market rent, and supermarket and community services provision. This list is not intended to be exhaustive, but we consider these to be some of the key characteristics which define the hierarchy we have sought to define in the figure above.

Figure 12.17.1 Retail Hierarchy Indicators

Centre	No of Units	Market Share – Comparison Goods (Inner Study Area)	Market Share – Convenience Goods (Inner Study Area)	Market Rent	Community Services ³⁴	Large Supermarkets ³⁵
Penarth	168	6.3%	1.6%	£160.60/ sq m	LIB ³⁶ , DS, TS	0
Barry Holton Road	160	8.3%	2.2%	£143.81/ sq m	LIB, LC ³⁷ , DS ³⁸	0
Cowbridge	145	3.5%	8.3%	£170.94/sq m	LIB, LC ³⁹ , DS, PS ⁴⁰	1
Barry High Street	120	-	0.5%	£157.59/ sq m	DS ⁴¹ , TS ⁴²	0
Llantwit Major	89	1.5%	2.7%	£149.84/sq m	LIB ⁴³ , DS, PS ⁴⁴ , TS ⁴⁵	0

³⁴ Community facilities key = LIB (Library), LC (Leisure Centre), DS (Doctors Surgery), PS (Police Station), TS (Train Station) – included if within 300m of centre boundary.

³⁵ Defined as supermarkets with 1,000 sq m + net sales area.

³⁶ Penarth Library is adjacent to the adopted Town Centre boundary.

³⁷ Barry Leisure Centre is in close proximity to the adopted centre boundary.

³⁸ Ravenscourt Doctors Surgery are located outside of the adopted Town Centre boundary.

³⁹ Cowbridge Leisure Centre is located in close proximity to the adopted Town Centre boundary.

⁴⁰ Cowbridge Police Station is located in close proximity to the adopted Town Centre boundary.

⁴¹ West Quay Medical Centre is located in close proximity to the adopted Town Centre boundary.

⁴² Barry Train Station is located in close proximity to the adopted Town Centre boundary.

⁴³ Llantwit Major Library is located in close proximity to the adopted Town Centre boundary.

⁴⁴ Llantwit Major Police Station is adjacent to the adopted Town Centre boundary.

⁴⁵ Llantwit Major Train Station is adjacent to the adopted Town Centre boundary.

12.18 In terms of any potential amendments to the hierarchy, we would recommend that both Penarth and Cowbridge are “upgraded” to a “town centre” status to sit alongside Barry Holton Road. The recommendation is supported by:

- The table above which shows a clear distinction between the two tiers of the hierarchy. It is broadly divided into three centres with circa 150 units (namely Penarth, Barry Holton Road, and Cowbridge), and two centres with circa 100 units (namely Barry High Street and Llantwit Major). The market share assessment also broadly supports this division, whereby the comparison market share for Penarth, Barry Holton Road, and Cowbridge ranges between 3.5% and 8.3%, whilst for Barry High Street and Llantwit Major this is less significant (0% and 1.5% respectively). The convenience market share for all centres is broadly similar, on the basis that none of the centres other than Cowbridge) have larger supermarkets.
- The findings of the health checks presented earlier in the Study. Penarth, Barry Holton Road, and Cowbridge have a more diverse mix of facilities, which cater for a wider catchment area. Barry High Street and Llantwit's Major have a less extensive offer, due to their smaller size. The role of Barry High Street is focused on retail and leisure services, whilst its convenience and comparison offer is more limited. Llantwit's Major has a high proliferation of financial and business services, whereas retail and leisure services are somewhat lacking; and whilst its comparison offer is adequate for the centre of its size, its convenience offer appears to be lacking.
- The Geographical positioning and distribution of the centres, and the evidence from the household survey on the established catchment areas. All five centres form a broad circle around the Council area, which ensures good geographical coverage. The proposed “upgraded” of Penarth and Cowbridge to a “town centre” status also means that each Inner Study Area zone will have a higher-order centre, which in turn would encourage equal levels of investment and distribution of future development which would help in “clawing-back” trade that is currently lost to areas outside of the Council (namely Cardiff and Bridgend).

12.19 As stated above, this Study does not review any of the existing allocated 13 Local Centres and 11 Neighbourhood centres, and hence we cannot comment on the existing hierarchy to that extent. However, our market shares assessment indicates that the following 10 existing Local and Neighbourhood centres have a relative draw from the Inner Study area - these, along with the rest of currently designated Local and Neighbourhood centres should be reviewed by the Council against the suggested centre hierarchy and the role of each tier of the hierarchy:

1. NC Castle Court - The Parade Dinas Powys
2. LC Main Street Cadoxton
3. LC Cardiff Road Dinas Powys
4. LC Fontygary Road Rhoose
5. LC The Square St Athan
6. LC Cornerswell Road
7. LC Barry Road
8. LC Dinas Powys Village
9. LC Cornerswell Road Penarth
10. LC Park Crescent Barry

12.20 We have also been asked by the Council to comment on whether the Barry Waterfront area should be included in the centre hierarchy. The area consists of a number of hubs:

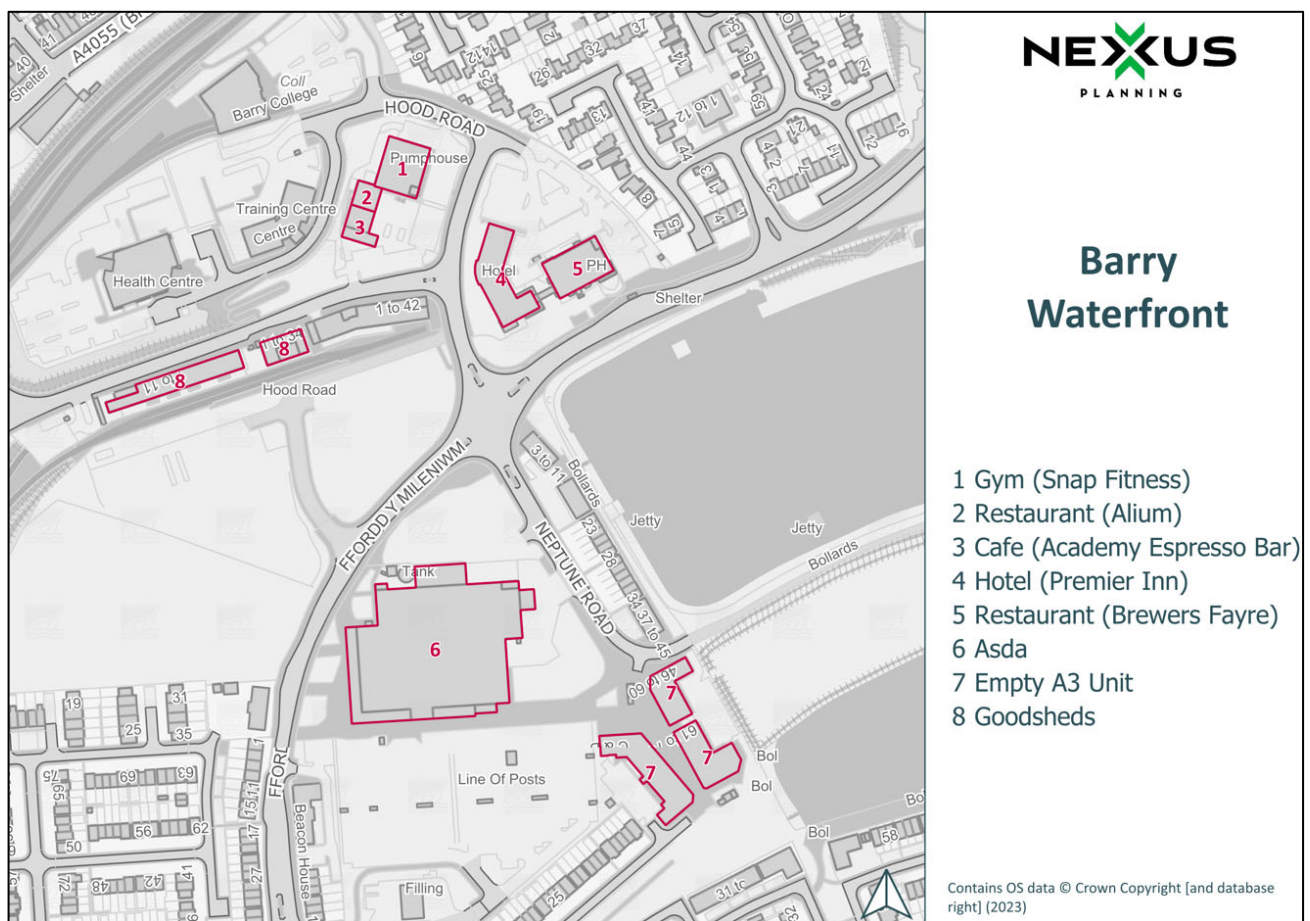
- a larger Asda supermarket;
- a number of newly built but unoccupied A3 units

- the Goodsheds scheme (independent food & drink, boutique retail & lifestyle outlets, with an outdoor gym and a coffee drive-through)
- a Premier Inn hotel with its restaurant (Brewers Fayre)
- Snap Fitness gym and Academy coffee shop, and Alium restaurant.

12.21 However, this area would not qualify as a ‘centre’ on the basis that the units have been developed independently of each other and hence are segregated from one another by main roads and dividing the public realm. The area is also car-focused, whereby pedestrian linkages between the individual elements are unenticing. The area hence does not benefit from a unified character and therefore does not function as a stand-alone centre. Furthermore, the overall offer of the area is limited to convenience, comparison and leisure services uses (as defined by GOAD), and there are no retail services, financial and business services, or community uses.

12.22 Furthermore, the Barry Waterfront area is located in close proximity to the designated centres Barry Holton Road and Barry High Street. The health check for Barry Holton Road found key issues associated with the overall offer and the high number of vacancies, as well as a need for investment in the overall quality of the environment. Barry High Street would also benefit from improving the choice and range of the overall offer with the centre. As such, designating Barry Waterfront as a “centre” could harm these existing centres due to the potential diversion of future investment and trade.

Figure 12.22.1 Barry Waterfront Components



12.23 Based on the above, we suggest that the hierarchy set out in the figure below might be appropriate.

Figure 12.23.1 Recommended Classification of Centres

Hierarchy	Role	Centres
Town Centres	Provides (or has the potential to provide) a range of shops, services, businesses, cultural, leisure and community facilities to a significant hinterland which includes smaller neighbouring towns or a number of suburbs.	Barry Holton Road Penarth Cowbridge
District Centres	Provides (or has the potential to provide) a range of shops, services, businesses and community facilities to a hinterland which includes neighbouring villages or a few surrounding suburbs.	Barry High Street Llantwit Major
Local Centres	Provides (or has the potential to provide) essential shops and services to a surrounding community including nearby villages and hamlets.	To be reviewed by the Council
Neighbourhood Centres	Provides (or has the potential to provide) essential shops and services to its immediate residential area.	To be reviewed by the Council

Source: Nexus Planning

The Spatial Extent of Centres

12.24 Earlier in this Study, we identify in Section 5 the following quantitative and qualitative capacity by 2036:

- Convenience floorspace: Quantitative capacity between 4,282 sq m (assuming Top 4 operators⁴⁶) and 5,862 sq m net (assuming deep discounter operators⁴⁷). In qualitative terms the following Centres have been identified in potential need for a medium to larger supermarket: Barry Holton Road town centre; Penarth district centre and Llantwit Major district centre.
- Comparison floorspace - between 432 sq m net and 679 sq m net. This is relatively small and hence should be directed towards re-occupation of vacant floorspace in designated centres.
- Restaurants, Pubs, Bars and Café Capacity - up to 5,846 sq m by 2036⁴⁸. Whilst our figures show that there is likely to be pent-up consumer demand for additional spending in this area, this does not mean that all of that demand should be met through a new floorspace. The potential re-occupation of vacant floorspace should be accounted for in the first instance.
- Cinema - there appears to be both quantitative and qualitative capacity for an additional cinema. We would recommend that this is directed towards Barry Holton Road town centre and/ or Cowbridge district centre as these lack in leisure offer.
- Ten-pin bowling – Whilst there appears to be both quantitative and qualitative capacity, there is unlikely to be a requirement to allocate any specific site for this purpose, on the basis of ten-pin bowling being an industry in

⁴⁶ Asda, Tesco, Sainsbury's and Morrisons - Looking at the existing out of centre operators, Top 4 operators have average convenience sales area size of 2,817 sqm (see appendix C, table 5).

⁴⁷ Aldi and Lidl - Looking at the existing out of centre operators, Top 4 operators have average convenience sales areas size of 1,124 sqm (see appendix C, table 5)

⁴⁸ This figure does not include existing committed leisure developments in this respect - or example, we are aware that 1,885 sq m for food and drink (A3) floorspace has been built, but remains unoccupied, as part of the Barry Waterfront scheme (2019/01407/RES) – this would “eat into” the estimated capacity.

decline and the fact that in practice ten-pin bowling facilities in Cardiff would meet any identified quantitative capacity.

12.25 As such, based on the above we would recommend that the Council considers:

- If/how the identified convenience floorspace capacity can be accommodated within centre-boundaries of Holton Road town centre; Penarth district centre and Llantwit Major district centre.
- If/how a cinema can be accommodated within Barry Holton Road town centre and/ or Cowbridge district centre.

12.26 The Council will need to take a view on whether there is a need/ability to expand the existing (or as proposed by this Study) town centre boundaries. In the meantime, this Study reviews whether the current boundaries (irrespective of the above) are appropriate.

12.27 Precise guidance for defining the spatial extent of centres is not provided in either PPW or TAN 4. However, both documents make it clear that appropriate boundaries are necessary to enable developers and decision-makers to consider the sequential, impact and needs tests when considering individual proposals for development and/or change of use. It is also relevant for consideration of the impact threshold (nationally set at 2,500 sq m gross external area).

12.28 Edge-of-centre is defined as sites which are within a 300m walking distance of a centre boundary (TAN 4, Paragraph 7.4), whilst out-of-centre is defined as those areas beyond 300m. Defining suitable boundaries is therefore important in this context.

12.29 When defining boundaries, the Council must weigh up the advantage of having a sufficiently large area to cater for the likely demands of the range of existing and future town centre uses within a centre, but also, the disadvantages of defining too wide an area, whereby a number of sites which may not be suitable for development fall within the edge-of-centre category. A balance must therefore be struck between the two.

12.30 Importantly, PPW also notes that it may be appropriate to make changes to a retail and commercial centre boundary where a particular centre is evidenced to be in decline, and where regeneration initiatives are thought unlikely to be successful (Paragraph 4.3.36). Based on our health checks, we do not consider that these circumstances exist in any of the assessed centres.

12.31 PPW also discusses the importance of identifying Primary and Secondary Shopping Areas within the boundaries of major centres (Paragraphs 4.3.30 to 4.3.39). Primary areas are typically characterised by a high proportion of A1 retail use, and secondary areas typically contain mixed uses such as shops, café and restaurants and other service and community uses. Local Authorities should encourage a diversity of uses within centres and link policies to these designations. It is noted that all assessed centres in the Council area benefit from primary shopping frontages and secondary shopping frontages (as governed by Policy MG14).

12.32 In general terms, and building on our observations on trends in Section 4 we consider that the future of the High Street is likely to evolve quickly and that there is some danger in being closed to the idea of non-retail uses at ground floor level within the heart of town centres. The shift to online trading and the lasting impacts of the pandemic have accelerated previous thinking on this. Moreover, any application for a change of use would need to be considered through a planning application in any event (where Permitted Development Rights do not apply) and so there is a significant degree of control, even where there is no defined primary or secondary shopping frontage. It is unnecessary to unduly constrain the availability of potentially beneficial and footfall-generating uses by defining Primary or Secondary Shopping Frontages too widely if, indeed, they are required at all. This theme is recognised throughout the relevant parts of PPW, the findings of 'Future Wales: The National Plan 2040' (2021) and 'Building Better Places' (2020), namely:

- **PPW** states that retail and commercial centres are hubs of social and economic activity and the focal point for a diverse range of services, which support the needs of local communities. Retail and commercial centres should provide a range of shopping, commercial and leisure opportunities as well as places of employment, education, civic identity and social interaction. Opportunities to live in these centres, combined with their good public transport links, make them the most sustainable places.
- **'Future Wales: The National Plan 2040' (2021)** supports intensification, housing and mixed-use development in town centres; and the need to make town centres multi-functional places whereby new commercial, retail, education, health, leisure, and public service facilities must be located within town and city centres.
- **'Building Better Places' (2020)** recognises that retail and commercial centres are hubs of social and economic activity and the focal point for a diverse range of services and cultural activities/functions, which support the needs of local communities. The planning system must ensure that our retail and commercial centres can operate as flexibly as possible. The role and function of established shopping areas must be reassessed. It recognises the need for outside spaces and its creative use; the need to establish town centre's as a go-to place where a variety of retail, employment, commercial, community, leisure, health and public sector uses come together in a hub of activity. Residential uses are also key to the vitality of centres, provided that they do not curtail the commercial activities which take place and soundscapes are considered. It recognises that traditional retailing uses will not be as prevalent and the demand for new retail space will be very low for the foreseeable future, therefore primary retail areas will need to be urgently reviewed. Unreasonable and inflexible policies should be challenged through the development plan process, as much more creative thinking will be needed to reimagine and re-purpose these areas.

12.33 As such, we propose that Primary or Secondary Shopping Frontages are removed throughout. Notwithstanding this, we recognise the need to protect uses within town centre boundaries and this is discussed further below as part of our advice on Development Management Policies.

12.34 We have then looked at amending or delineating centre boundaries for Barry Holton Road Town Centre; Barry High Street / Broad Street District Centre; Cowbridge District Centre; Llantwit Major District Centre; Penarth District Centre. The table below sets out the proposed changes. Our suggested boundary revisions are set out at **Appendix E**.

Figure 12.34.1 Proposed centre boundary changes

Centre	Centre Boundary Changes
Barry High Street	<ul style="list-style-type: none"> Expand existing boundary to include several units (dog groomers, solicitors and repair shop) to the north-east of East Street. Contract boundary to exclude area along Broad Street which contains primarily residential and vacant units.
Barry Holton Road	<ul style="list-style-type: none"> Contract boundary to exclude vacant and residential units at the south-west of the centre. Extend boundary to include Barry Leisure Centre and car park. Contract boundaries at Regent Street and Richard Street to exclude residential properties. Contract boundary at the east of the centre to align with the pedestrianised area, to prevent the town centre from merging with the Old Upper Holton Road Local Centre
Cowbridge	<ul style="list-style-type: none"> Contract boundary to exclude south-east of the centre which primarily consists of residential units. Amend the boundary to align with the border of the Cowbridge Physic Garden.
Llantwit Major	<ul style="list-style-type: none"> Amend the existing boundary at several points to the west, north and south of the centre to exclude residential properties and other non-town centre uses.
Penarth	<ul style="list-style-type: none"> Extend the boundary to include three units (pug, gym, bike shop and architects) north of Salop Street. Contract boundary at the north-west of the centre to exclude primarily residential properties along Ludlow Street. Contract the boundary at the north-east of the boundary to exclude a vacant unit. Extend the boundary at the east of the centre to include Penarth Library. Extend the boundary at the south of the centre to include the Railway Hotel pub.
All above centres	<ul style="list-style-type: none"> Remove Primary or Secondary Shopping Frontages.

Development Management Policies

12.35 In light of the findings of this Study, we set out below a series of recommended policy themes for consideration under the replacement Local Development Plan. The LDP Team will draft the final planning policies to be contained within the Plan.

General Policies

12.36 To inform the policy recommendation, we have reviewed:

- Policy SP6 – Retail;
- Policy MG12 – Retail Hierarchy;
- Policy MG13 - Edge And Out Of Town Retailing Areas ;
- Policy MG14 - Non-A1 Retail Uses Within Town And District Retail Centres;
- Policy MG15 - Non-A1 Retail Uses Within Local & Neighbourhood Retail Centres.

12.37 It is recommended that the above policies are replaced to include policies which:

1. Sets out a clear Town Centre Hierarchy, as per our recommendation above.
2. Sets out ‘town centre first’ approach by including criteria which:
 - i. Support proposals which promote the identified centres as the preferred locations for town centre uses, including retail, leisure, office, visitor accommodation and appropriate residential and community facilities. A particular emphasis should be placed on residential living at centres of appropriate scale. By encouraging more residential living in town centres, footfall is created for both the daytime and night-time economy. One way of creating additional residential living in town centres is to consider the demand and supply for office accommodation, which is especially pertinent in the wake of the pandemic;
 - ii. Ensure that development proposals are in keeping with the defined role of each centre (as set out above);
 - iii. Stipulate that the retail hierarchy is the starting point for the consideration of retail impact and the sequential test, where proposals for town centre uses outside of town centre locations are concerned;
 - iv. Make reference to the 2,500 sq m (gross) threshold for requiring retail impact assessment (Paragraph 4.3.26 of PPW11, 2021);
 - v. Importantly, PPW also makes it clear that local planning authorities can request retail impact assessment on smaller sites/units, where they consider there may be a significant impact on existing centres (Paragraph 4.3.27), and so this too should be discussed; and
 - vi. The Council may also wish to adopt a policy which seeks to ensure that the sub-division of large out-of-centre retail and leisure floorspace is subject to impact assessment. It would be a concern if out-of-centre locations sought to provide a scale of footprint which mirrors one of the current niches of a town centre, i.e. small footprint units suitable for start-up, high-end or service uses

3. Loss of ground floor uses within the centres:

- i. Loss of ground floor uses in A1, A2 and D2 Use Class; leisure, entertainment and recreation uses (namely cafes, restaurants, bars and pubs); arts and culture uses (namely theatres, museums, galleries and concert halls) should only be supported:
 - where evidence can be provided that the alternative use would
 - a. enhance the character of the centre;
 - b. be compatible with surrounding uses;
 - c. generate pedestrian activity;
 - d. not result in adverse amenity impacts;
 - e. provide an active frontage;
 - f. would not result in a concentration of uses that harms the vitality and viability of the centre;
 - and
 - it can be demonstrated that the unit does not have a realistic prospect of being occupied by the ground floor uses as listed above, through evidence of long-term vacancy (in our experience, an 18-month period is often required) and proactive marketing.
- ii. Alongside the criteria-based approach set out above, the Council may also wish to employ a minimum threshold policy. This is where certain uses would not be permitted if they would result in the number of Uses listed in (i) above to fall below a certain level. Such an approach is very precise in application and monitoring, but by itself does not offer the necessary flexibility to adapt to changing town centre trends and consumer demands and habits.

4. Other Complementary Policies:

- i. Alongside retail and town centre policies, it is worth considering how complementary policies can seek to take advantage of the opportunities resulting from new housing developments that would increase footfall to a centre, attract new operators and formats, and support the vitality and viability of the Council's designated town centres:
- ii. Flexible working practices and new formats should be encouraged through planning policies supporting the amalgamation or sub-division of existing town centre units and workspace (where such development results in little loss of net floorspace, but results in a better standard of retail or office accommodation etc.) to encourage investment.
- iii. Policy support may also be provided for 'meanwhile' uses to temporarily occupy long-term vacant units by occupiers seeking to test new business concepts, pop-up stores and event spaces where they support the vitality and viability of the town centre.
- iv. It would be important that any policies aimed at re-occupying vacant units, alongside encouraging meanwhile units, worked appropriately in tandem. We would anticipate that meanwhile uses

(presumably secured by Planning Condition) would not constitute a use that would re-start the clock on the 18-month vacancy period, in order to ensure that property owners were not discouraged from exploring such uses.

- v. Complimentary initiatives that could benefit from policy support could include the construction of click-and-collect 'hubs' or lockers, and the use of outdoor space for public events where it can be demonstrated that their installation would enhance the vitality and viability of the centre, and would not restrict accessibility.

Direction for Retail Development

Convenience Floorspace

12.38 Our quantitative assessment of capacity found convenience floorspace capacity between 4,282 sq m (assuming Top 4 operators⁴⁹) and 5,862 sq m net (assuming deep discounter operators⁵⁰) by 2036. In qualitative terms the following Centres have been identified in potential need for a medium to larger supermarket: Barry Holton Road town centre; Penarth district centre and Llantwit Major district centre.

12.39 It should be noted that any inability to accommodate the identified floorspace within the above centres, does not automatically result in the need to allocate out-of-centre sites. Such an approach is unlikely to address the qualitative shortcomings of these centres and would not ordinarily improve the vitality and viability of these centres.

Comparison Floorspace

12.40 Our quantitative assessment of capacity found that there is limited capacity to introduce additional comparison floorspace into the Vale of Glamorgan Council area namely between 432 sq m net and 679 sq m net by 2036. As this is relatively small, we do not recommend that any sites are brought forward as part of the Local Plan to accommodate comparison retailing. New comparison floor space should be directed towards re-occupation of vacant floorspace in town centres.

Direction for Leisure Development

12.41 There appears to be both quantitative (5,846 sq m⁵¹) and qualitative capacity for an additional food and beverage floorspace. The potential re-occupation of vacant floorspace within designated centres should be accounted for in the first instance. It is noted that Barry Holton Road town centre, Cowbridge and Llantwit Major district centre lacks in leisure offer and hence proposals for new food and beverage floorspace should be directed to these centres as a matter of priority.

12.42 There appears to be both quantitative and qualitative capacity for an additional cinema. This should be directed towards Barry Holton Road town centre and/ or Cowbridge district centre as these lack in leisure offer and we would recommend that the Council adopts a positive policy approach to any future development proposals of this type.

⁴⁹ Asda, Tesco, Sainsbury's and Morrisons - Looking at the existing out of centre operators, Top 4 operators have average convenience sales area size of 2,817 sqm (see appendix C, table 5).

⁵⁰ Aldi and Lidl - Looking at the existing out of centre operators, Top 4 operators have average convenience sales area size of 1,124 sqm (see appendix C, table 5)

⁵¹ This figure does not include existing committed leisure developments in this respect - or example, we are aware that 1,885 sq m for food and drink (A3) floorspace has been built, but remains unoccupied, as part of the Barry Waterfront scheme (2019/01407/RES) – this would "eat into" the estimated capacity.

- 12.43 Whilst there is no identified quantitative capacity for new Health & Fitness provisions, qualitative demand exists. We recommend that the Council adopts a positive policy position for such schemes.
- 12.44 Whilst there appears to be both quantitative and qualitative capacity for ten-pin bowling, there is unlikely to be a requirement to allocate any specific site for this purpose, on the basis of ten-pin bowling being an industry in decline and the fact that in practice ten-pin bowling facilities in Cardiff would meet any identified quantitative capacity.
- 12.45 Notwithstanding our capacity assessments, there is a level of dissatisfaction with the provision of facilities for children and cultural activities in the Council Area as a whole, and this may be a focus for future Plan policy.

Centre-Specific Intervention

- 12.46 In keeping with our observations under the health checks, the Council may wish to propose a number of centre-specific interventions within the new Plan, or under associated guidance. Each suggestion is aimed at raising vitality and viability. We summarise below a list of interventions which we consider are likely to be the highest priority based on our assessment, as well as the qualitative findings of the Household Telephone Survey:

- **Barry Holton Road** – an introduction of a medium to larger supermarket and a cinema could be beneficial if appropriate sites came forward within the town centre. Improvements to the wider leisure offer should also be sought. New food and beverage floorspace should be directed to these centres as a matter of priority. Efforts should be made to allow the re-occupation of vacant units, which are clustered towards the western end of the centre. The centre would also benefit from investment into the public realm, maintenance and safety.
- **Barry High Street** - Improving the choice and range of the overall offer with the centre would be beneficial, especially to address its somewhat lacking convenience and comparison offer. The centre would benefit from public realm improvements and maintenance and improving parking facilities. The use of public transport facilities should be actively encouraged.
- **Penarth** - an introduction of a medium to the larger supermarket could be beneficial if an appropriate site came forward within the town centre. Further investment into public realms and maintenance would be beneficial to create a stronger sense of place. Some pedestrianisation may be beneficial to address existing car dominance. Unification of the two separate parts of the centre (namely the main offer on Windsor Road and Glebe Street to the north of the centre, and a pocket next to the Penarth railway station) would also be highly desirable. The centre would benefit from improving parking facilities and/or measures to encourage alternative means of transport to decrease reliance on car travel.
- **Cowbridge** – Improvements to the wider leisure offer should be sought. New food and beverage floorspace should be directed to these centres as a matter of priority. An introduction of a cinema could be beneficial if an appropriate site came forward within the town centre. Increasing green space and landscaping, and capitalising the river as a public realm asset would be beneficial. The centre would benefit from improving parking facilities and/or measures to encourage alternative means of transport to decrease reliance on car travel.
- **Llantwit Major** – the centre's leisure and convenience offer needs improvement. An introduction of a medium to the larger supermarket could be beneficial if an appropriate site came forward within the town centre. Further investment into public realms and maintenance would be beneficial to create a stronger sense of place and character. The centre would benefit from a rationalisation of its layout to improve legibility and a better connection to its railway/bus stations. The centre would benefit from improving parking facilities and/or measures to encourage alternative means of transport to decrease reliance on car travel.

Concluding Comments

- 12.47 This Study has addressed the current market shares and vitality and viability of the five assisted centres within the Council area. We have provided a range of advice in respect of the plan-making process.
- 12.48 Notwithstanding our advice, the global, UK and Welsh economy is undergoing a significant change at the time of writing. As advocated at 4.3.3 of PPW, we recommend that the Council, therefore, continues to monitor the overall situation regarding its retail centres carefully.

Glossary of Terms

Bulky goods:	Goods of a large physical nature (for example DIY, furniture, carpets) that sometimes require large areas for storage or display. <i>Source: Planning Portal (England & Wales)</i>
Capacity:	Forecast resident spending within the catchment area, with which to support existing and additional retail floorspace. <i>Source: Planning Portal (England & Wales)</i>
Comparison Goods:	Retail items not bought on a frequent basis, for example televisions and white goods (fridges, dishwashers etc.). <i>Source: Planning Portal (England & Wales)</i>
Convenience Goods:	Everyday essential items, such as food. <i>Source: Planning Portal (England & Wales)</i>
Edge-of-Centre:	When allocating sites or when determining applications that are in edge of centre locations, local planning authorities should consider the distance that a site is from the edge of a retail and commercial centre for it to be accessible by foot. Wherever possible edge of centre site allocations or development proposals should be located adjacent to a designated retail and commercial centre boundary, where this is not the case it should not normally be more than 200 to 300 metres from the edge of the centre. Factors such as the size of the retail and commercial centre, local topography and presence of physical barriers to access may influence any assessment. It may be appropriate to use a shorter acceptable distance between the centre and the development proposal if the centre is small. Local planning authorities should consider whether to specify advice in their LDP about accessible distances from retail and commercial centres to edge of centre developments. <i>Source: TAN 4</i>
Expenditure per Capita:	The amount of money spent on retail goods per person in each Zone across the Study Area.
Expenditure:	Average annual expenditure levels for various forms of goods, multiplied by the population within the defined Study Area.
Experian Goad:	Experian Goad is a retail property intelligence system that helps retail developers, property investors, planning professionals, and commercial agents to identify profitable locations for retail property development and investment projects. It offers comprehensive retail location plans and easy to use reports covering over 3,000 shopping areas in the UK.
Experian (MMG3):	A population, expenditure and socio-demographic dataset that utilises the 2011 Census release, projected forward by using growth rates derived from Office for National Statistics projections and current age and gender estimates.
Financial & Business Services:	An Experian Goad category comprising the likes of banks, building societies, employment agencies, legal services, estate agents and business services. <i>Source: Experian Goad</i>
Goad Plans:	A plan showing a bird's eye view of a retail centre including the exact location of all retail outlets and vacant premises, fascia name, retail category, and floor space. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured, allowing you to instantly assess the site quality of existing

or prospective store locations.

Source: Experian

Independent Retailers:

Retailers with less than ten outlets/ stores.

Source: Experian

Leisure Services:

An Experian Goad category for town centre leisure units which includes bars, cafes, cinemas, nightclubs, take-aways, hotels, public houses and restaurants. For clarity, it does not include facilities for leisure pursuits e.g. sports centres, swimming pools or health & fitness clubs.

Source: Experian Goad

Market Share:

The proportion of residents that visit a particular retail destination, derived from household survey results.

National Multiple:

Defined as retailers with ten or more stores/ outlets.

Source: Experian

Primary shopping area:

A primary area is generally characterised by a high proportion of A1 shopping uses.

Source: TAN 4

Retail Floorspace:

Total floor area of the property that is associated with all retail uses in square metres. May be expressed as a net figure (the sales area) or in gross (including storage, preparation and staff areas).

Source: Planning Portal (England & Wales)

Retail Impact:

The potential effects of proposed retail development upon existing shops.

Source: Planning Portal (England & Wales)

Retail Services:

An Experian Goad category comprising the likes of dry cleaners, health & beauty, opticians, photo processing, post offices and travel agents.

Source: Experian Goad

Sales Density:

Turnover, per square metre. Various retail planning sources such as Verdict UK Food & Grocery Company Briefing Reports and Mintel Retail Rankings provide average (or benchmark) sales densities for national multiple convenience retailers.

Sequential Approach:

A planning principle that seeks to identify, allocate or develop certain types or locations of land before others. For example, brownfield housing sites before greenfield sites, or town centre retail sites before out-of-centre sites.

Source: Planning Portal (England & Wales)

Secondary shopping area:

A secondary area typically incorporates a broader mix of uses such as shops, and non A1 uses including cafes, restaurants, banks, other financial institutions, services, and other uses complementary to a retail and commercial centre.

Source: TAN 4

Special Forms of Trading:

Special forms of trading (SFT) are defined as sales via the internet, mail order, stalls and markets, vending

machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies.

Source: Experian

Turnover:

Amount of sales per unit area of retail floorspace

Source: Planning Portal (England & Wales)

Town Centre:

A wide range of uses are located in retail and commercial centres including retail, office, residential, leisure, tourism and community functions. These centres are traditionally characterised by having higher densities which increases scope for different uses, including residential, to be accommodated above retail and commercial floorspace. Encouraging people to live and work in existing centres reinforces local demand and provides additional vibrancy during the day and in the evening.

...

Higher order retail and commercial centres need to be accessible to a large number of people, and the scale and diverse range of uses present will reflect the needs of a population that is normally greater than the local community. Higher order centres are typically characterised by combinations of shops, offices, financial & professional services, food and drink establishments, hotels, education facilities, entertainment and leisure, non residential institutions as well as residential.

...

Lower order centres are characterised by smaller scale provision and fewer uses with the intention of primarily serving the needs of a local community. Lower order centres will typically include shops, financial & professional services, food and drink, and non residential institutions of an appropriate scale, but depending on the centre may include other uses

Source: TAN 4