ES11.3

Blaenau Gwent County Borough Council

Blaenau Gwent County Borough Council

Local Development Plan

Hearing Session 11: Blaina Local Town Centre

Tuesday 3 July 2012

Examination 2012

Blaenau Gwent County Borough Council Submission

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SESSION 11 BLAINA LOCAL TOWN CENTRE

Introduction

This Statement has been prepared by Blaenau Gwent County Borough Council in order to help facilitate appropriate discussion at the Blaina Local Town Centre Hearing Session. The Paper provides a response to the questions set by the Planning Inspector (Mr Vincent Maher).

Where the Council does not intend to provide any additional written evidence the Inspector's attention is directed to the relevant part of the Evidence Base, which in the view of the Council addresses the matters raised. The paper will not repeat evidence previously submitted for consideration.

The Council's detailed response to the representations received to Blaina Local Town Centre are contained in the Report of Representations (**SD07b**).

Council Response to Inspector's Questions (questions in bold)

1. Is the Council giving unfair priority to development in centres such as Ebbw Vale, at the expense of Blaina and other centres?

No. The Council do not consider that it is giving unfair priority to development in centres such as Ebbw Vale at the expense of Blaina and other centres. The Council acknowledge that there is an emphasis in terms of development in Ebbw Vale. This reflects the Wales Spatial Plan's (**W34**) identification of Ebbw Vale as a key settlement that has a critical role to play in the success of the Capital Region. It is also recognised that retail development is identified in Ebbw Vale town centre under policy R1. This is based on the evidence that Ebbw Vale has the physical capacity to grow in its retail and service provision (**SD59a**).

Notwithstanding this, the Local Development Plan Strategy is based on building a network of district hubs around the principal hub of Ebbw Vale so that all areas can share in the benefits of growth and the new opportunities being provided at Ebbw Vale. The benefits of regeneration are to be spread across Blaenau Gwent through good sustainable transport links between the hubs. The hub approach aims to bring the towns and communities of Blaenau Gwent closer together rather than create greater disparities.

The revitalisation of all of Blaenau Gwent's town centres is an important priority of the Council (**SD121**). This is evidenced through town centre action plans (**SD84** to **SD89**) being in place for the principal and district town centres, which identify regeneration schemes and the Holistic Regeneration Plans (**SD35** to **SD38**) for each of the hub areas. A Regeneration Action Plan is currently being implemented in Blaina. A copy of this is attached as Appendix 1.

In addition to this, Suitability Occupier Reports and a marketing and branding exercise has been undertaken for each of the town centres. A copy of each of the Suitability Occupier Reports for each of the town centres are attached at Appendix 2. These reports establish an accurate picture of the potential investors that could be attracted to the county borough's town centres; and target and attract increased retail/mixed use/other investment to the town centres utilising a professional and consistent promotion method.

It is therefore evident through the action plans and schemes being implemented that the revitalisation of all of the town centres is a key priority for the Council.

Rebuttal – Nantyglo and Blaina Town Council (Representor No: 47)

Nantyglo and Blaina Town Council consider that Blaina is not only at a disadvantage given its location to the other town centres but is not receiving commercial regeneration at all. The Council agree that Blaina is located mid way between the district town centres of Brynmawr and Abertillery and a short distance away from Ebbw Vale. The close proximity of these town centres mean that the residents of Blaina can share in the benefits of growth and the new opportunities being provided. The benefits of regeneration are to be spread across Blaenau Gwent through good sustainable transport links between the hubs. The hub approach aims to bring the towns and communities of Blaenau Gwent closer together rather than create greater disparities.

It is acknowledged that the Council has secured funding for the regeneration of Ebbw Vale and Abertillery town centres. The Blaina Regeneration Action Plan (attached as Appendix 1) is currently being implemented. A multi agency group has been set up to co-ordinate progress and are currently meeting bi-monthly. It is acknowledged that there is no funding available for Blaina yet it is viewed as the responsibility of the lead organisation for each project to identify funding. When a funding stream becomes available for physical regeneration, the regeneration department will submit an application.

Nantyglo and Blaina Town Council also consider in their statement (**ES11.1**) that the LDP does not reveal a meaningful definition of a local town. Paragraphs 6.23 and 6.24 on page 30 of the Plan (**SD01**) seek to provide a definition of district and local town centres. Further information is also available on the criteria used to categorise the town centres in **SD48**, pages 32 – 35).

It is accepted that the Plan refers to the Salem Chapel development in paragraph 6.10 of the Plan (**SD01**). The Council consider that the town’s historical legacy provides opportunities to build tourism opportunities around heritage trails in connection with the chartist movement in the area. The establishment of the Exhibition and Information Centre at Salem Chapel supports this future role for Blaina.

2. Does Policy DM7 provide an appropriate set of controls to manage changes of use within Blaina local town centre?

The Council's evidence for the approach taken in policy DM7 is set out in:

- **SD48:** Updated Retailing Background Paper

In summary, the Council consider that Policy DM7 provides an appropriate set of controls to manage changes of use within Blaina Local Town Centre. The controls set out in Policy DM7 are relative to the issues and challenges facing Blaina Local Town Centre.

Criterion (a) - Change of use to Hot Food Takeaways and Public Houses

A key challenge and issue identified for all town centres across Blaenau Gwent is the number of hot food takeaways and pubic houses operating in the town centres and their impact on the vitality of the shopping areas and residential amenity (**SD48**, page 16, Tables 7 and 8).

Although the number of hot food takeaways in Blaina town centre is less than the other centres, the percentage of hot food takeaways is high. This is due to the small size of the centre. The number of public houses is relative to the other centres which equates to a higher percentage. Consultation was undertaken with the traders, Communities First, the town centre manager and local members to gain consensus on the approach taken in criterion (a). The consultees were fully supportive of controlling the number of food and drink uses in the Blaina town centre.

Rebuttal – Nantyglo and Blaina Town Council (Representor No: 47)

The support for the hot food takeaways and public houses policy is welcomed.

Criterion (b) - Change of use to Residential

As evidenced in **SD48** Updated Retailing Background Paper, the relative health of Blaina town centre is a cause for concern. The town centre is a small town (61 properties) with a high vacancy rate of nearly 22% (July 2009). This vacancy rate increased further in July 2010 to reach 29.5% and although declining slightly in July 2011 to 24.6%, nearly a quarter of all properties in Blaina town centre are vacant (**SD48**, page 30, Table 10A).

Although Blaina town centre witnessed a slight increase in A1 uses between 2006 and 2009, in July 2011 a 5% loss was recorded from the previous year (**SD48**, pages 30 – 31, Table 10B and 10C).

Criterion (b) is developed in accordance with Planning Policy Wales (PPW) (**W41**, pages 143-144, paragraph 10.2.1) in order to manage and address the decline of the centre. Paragraph 10.2.1 of PPW states that *"dealing with change many mean redefining the boundaries of centres or identifying acceptable changes of use."* Given that the town centre boundary has only been amended slightly to exclude several properties that do not form part of the town centre frontage along High Street and those that are considered to be an edge of town location, the Council considered it necessary to identify acceptable changes of use; the use being residential.

This stemmed from a number of planning enquiries and planning applications being received to change the use of former commercial properties to residential use. The properties had been vacant for a considerable period of time and had failed to attract investment from the commercial sector. In 2008 and 2010 planning permission was granted for the change of use of three retail units to residential.

Criterion (b) provides the flexibility to consider the appropriate reuse of redundant units and to allow them to convert back to residential use if there is no market or demand for retail or commercial use. Vacant units can have a significant impact on the appearance and the amenity of an area and can harm the wider regeneration objectives.

It is essential that a balance is struck between ensuring the release of redundant retail premises and protecting retail units for their economic and social benefits. Policy DM7 will ensure that redundant retail premises are released for alternative uses where it is demonstrated that they are genuinely redundant and no longer deliver wider benefits to the community.

Rebuttal – Nantyglo and Blaina Town Council (Representor No: 47)

Nantyglo and Blaina Town Council consider that Policy DM7 (**SD01**, pages 62, paragraph 7.54 – 758) is negative to commercial development and that a development plan should contain an element of energy and interest for commercial enterprise. The Council disagree and consider that the Plan sets out a positive approach towards town centres in the Plan. The Vision in the Plan is exciting and challenging and sets out what the area should look like, of which delivering thriving town centres is a key theme. This is translated into Policies SP1, SP2 and SP3 which are positive policies seeking to deliver thriving town centres and the protection of local shopping facilities. The Plan also identifies new roles for the principal, district and local town centres and encourages tourism, leisure and cultural initiatives.

It is acknowledged that Policy DM7 sets out use class restrictions for Blaina local town centre, which could be viewed as negative. However, in accordance with Local Development Plan Wales (LDPW) (**PG3**, page 11, paragraph 2.13) succinct development management policies have been drafted to set out the general criteria against which planning applications of the development and use of land and buildings will be considered. PPW (**W41**, pages 143-152) sets out the policies for the positive management of town centres which should not be repeated in development plans.

Nantyglo and Blaina Town Council consider that an appropriate set of controls would be similar to that of an agricultural occupancy condition so that the value of the property would be affordable for continued use as retail premises. The purpose of an agricultural occupancy condition is to ensure that the dwelling is kept available to meet the needs of the farm or forestry business. The council do not consider it possible or reasonable to use an agricultural occupancy condition in these circumstances.

“Action for Blaina,” the report supported by Nantyglo and Blaina Town Council which was prepared in 2001 reveals that much of the same issues exist now for Blaina that was apparent eleven years previous. The vacancy rate is extremely high, although the vacant units tend to be spread throughout the town centre rather than at the southern end as identified in the 2001 report; and secondly there remains pressure to convert vacant units to residential use. The Council note that Chapter 4.0 of the report identifies future prospects for Blaina town centre and identifies a series of measures. The one measure identified of significance to this statement is to compactify the town centre. It is acknowledged that residential conversion is likely to happen due to the high number of vacant units and that the number of retail units is unlikely to increase. The measure encourages a compactification of the High street’s facilities into an uninterrupted core. This was explored by the Council when drafting a policy for Blaina. However, due to the spread of vacant and retail units throughout the town and the fact that consultation with local traders, local members, Communities First and the town centre manager showed no support for this proposal, this approach was not taken forward.

3. What is the land use planning case for restricting the percentages of hot food takeaways and public houses in Blaina?

The Council’s evidence for restricting the percentage of hot food takeaways and public houses in Blaina is set out in:

- **SD48:** Updated Retailing Background Paper (pages 16 – 18)

In summary, Blaenau Gwent County Borough Council, as the Local Planning Authority receive numerous planning applications each year to build new and change the use of buildings and retail uses to hot food takeaway establishments and public houses in the town centres.

The increase in the number of people using these facilities led to concern being expressed by local residents, local businesses, the police and others, in terms of their impact on both the character and appearance of the area, vitality of the shopping areas and residential amenity. In response to the concerns raised, research was carried out to assess the situation, in particular to look at how the balance of uses in the town centre has changed, what effect this has had and whether specific planning guidance is required to regulate new build and further proposed changes of retail units and buildings to hot food takeaway establishments and public houses in town centres.

This led to the production of Supplementary Planning Guidance for the Unitary Development Plan (attached as Appendix 3) which employed two controls to control the number and concentration of hot food takeaway establishments and public houses.

As part of the LDP preparation, consultation was undertaken with traders in the town, communities first, the town centre manager and local members who identified that the number of hot food takeaways and public houses operating in the town was a significant issue and that the number and concentration of such uses were detracting from the overall character and function of the centre.

It was therefore agreed that the control mechanisms were transferred into Policy DM7 for Blaina Local Town Centre of the Deposit Plan (**SD01**, pages 60 – 62).

4. Does criterion (b) of Policy DM7 clearly indicate when a change of use of the ground floor premises to housing would be supported?

The Council considers that the amended criterion (b) and supporting text of paragraph 7.58 (**SD10a**, MC.17 pages 23 -24) are sufficient to indicate when a change of use of the ground floor premises to housing would be required. It is not considered necessary to define in detail the circumstances as this consideration will depend on the individual circumstances.

Appendix 1

BLAINA WARD REGENERATION ACTION PLAN

Prepared by:
Regeneration Department
Blaenau Gwent County Borough Council

Final Draft
October 2011

Contents

Section A: Introduction

Blaenau Gwent County Borough Council has prepared this action plan to guide physical regeneration activity in Blaina in the next decade.

This document sets out the actions to be taken in Blaina based on research and consultation with stakeholders and service delivery partners. This plan is not a summary of actions for Blaenau Gwent County Borough Council. BGCBC is a key player and catalyst for many of the projects but many of the projects will be led by other organisations active in the Blaina area.

The table of projects sets out projects proposed with suggested lead organisations and funding sources. A comprehensive action plan is vital in guiding and co-ordinating regeneration activity in the area and attracting external funding from a wider range of funders.

Section B: Background

Blaina is located in the Ebbw Fach Valley. It is a small town serving local needs. The settlement is bi-sected by the A467 which runs along the valley. The town centre is to the east of the A467.

Blaina ward has a population of 4,800 and is made up of a number of discrete areas – Westside to the west of the A467, Cwmcelyn on the higher ground west of the town centre and Blaina South incorporating East Pentwyn & Southlands in the south of the ward adjacent to Bournville.

The ward has a mixture of public and private sector housing, the privately owned Rising Sun industrial estate, a small supermarket, medical centre housing doctors and dentist practice, library and learning action centre, a range of shops servicing local needs, a police station, community facilities and areas of open countryside.

Thirty seven percent of the population are recorded as economically inactive which is higher than the Blaenau Gwent average at 34.8%. The ward also has a slightly higher percentage of the population on Employment & Support Allowance and Incapacity Benefit at 14.8% in comparison to the Blaenau Gwent average at 14.3% and double the GB average at 6.7%. Blaina ward is a Communities First area.

Westside & Forgeside

This area consists mainly of streets of privately owned terraced housing. The area has the river Ebbw Fach running through it. The TRA has recently completed a riverside walk starting by the allotments running to the pavilion and park.

This area has a TA centre, bowls pavilion and a small play area. Pedestrian access to this area is via a pelican crossing by the Blaina roundabout on the A467 or via an underpass near the Library at the southern end of the town. Vehicular access is off the roundabout on the A467 and a turning off the A467 to access the Bowls Club and other facilities.

Cwmcelyn

This area is located above the main town of Blaina, it is a mixture of public and private sector housing including a development of older persons housing. Candystripes Day Nursery is located in a former Victorian school adjacent to Cwmcelyn Pond. The backdrop to this area is mountainside and forestry. Cwmcelyn Ponds is a popular local resource which is managed by Cwmcelyn TRA and the pond by Cwmcelyn Angling Association.

The issues for this area relate to ongoing upkeep of the area, improvements to pedestrian access to the town and anti-social behaviour in specific areas.

Blaina South

Blaina South comprises of streets of privately owned terraced housing. The TRA is not currently active.

Residential parking is an issue on the streets of terraced housing with insufficient space for the number of cars. There are limited community facilities in the area and a number of years ago the TRA worked up a proposal for a new community centre in East Pentwyn. This development did not proceed.

The consultation also highlighted a request for a children's play area local to Blaina South.

Blaina Communities First have been involved in discussions regarding facilities for young people and an area has been identified which may be suitable for the construction of a BMX track.

Town Centre

Blaina Town Centre comprises of a small number of commercial and residential properties primarily located on the main street known as High Street. Also located within the Town Centre are community venues such as the Institute, Learning Action Centre and Heritage Centre. The retail offer is limited, however the Town does benefit from a local Co-operative supermarket.

An issue for the Town Centre is the high commercial property vacancy rate of 29.5% (18 properties). This is well above the national average. The poor condition of the vacant properties adds further to the negative image of the Town, in particular The Kings Head property which has been derelict for a very long time. Blaenau Gwent County Borough Council has recently commissioned Miller Research Ltd to produce occupier suitability reports & business investment packs to target investors back into the Town Centre.

The quality of the Town Centre environment both built & natural requires attention. The only significant improvements to the town centre in recent years has been the creation of the Square at Lower High Street in 2008 and the refurbishment of Salem Chapel in 2010/11. The rest of the Town Centre looks tired and needs regenerating.

A Chamber of Trade exists however does not meet regularly, there is a need to strengthen this group. A marketing group was established in 2008 by the Town Centre Manager in partnership with Blaina Partnership & Communities First. Representatives from a wide range of Town Centre stakeholders are involved. The groups main focus is events and promotion of the Town Centre. A number of successful events have been organised in the Town Centre since the groups formation. Footfall figures are captured through an electronic counter on High Street which monitors visitor numbers into the Town Centre.

The Town benefits from a main car park opposite the Co-op and several smaller car parks including Hope Street, bottom of High Street and by the public toilets at the Laurels. Despite this there is still a major problem with illegal parking throughout the length of High Street.

Section C: Issues and Opportunities

An understanding of the main issues existing in Blaina is essential for the production of an action plan that will target the right areas. This understanding has been developed following key meetings with BGCBC Councillors, representatives from Blaina Communities First Partnership, representatives from Nantyglo & Blaina Town Council, officers from Council departments.

A walkabout the Blaina ward was also undertaken to familiarise the authors with the issues and the potential projects. A public consultation exercise was held during Blaina Fun Day in August 2010.

A SWOT analysis has been undertaken to assimilate the information from the baseline research and establish the main strengths, weaknesses, opportunities and threats. These results are presented in the table below.

Strengths	**Weaknesses**
• Rural setting • Potential tourism interest in the Chartist movement • Strong and active community • Tourism interest from the development of the Ebbw Fach trail • New primary school	• Poor condition of built environment gives a negative image • Limited retail offer • Contracting town centre • Lack of civic space in the town centre • Functional issues in the High Street re illegal parking, off street parking • Fragmented and poorly maintained community facilities, some in unsuitable locations
Opportunities	**Threats**
• Increasing tourism offer through the development of a Chartist Information and Visitor Centre • Improve pedestrian and cycle access with Brynmawr and Abertillery • More people into the town centre through activities and facilities • Reuse of vacant buildings for community/positive uses	• Failure to stop the contraction of town centre due to draw of larger supermarkets and stores • Failure to address empty properties and continued poor appearance of the area

The key issues to address through this action plan area:

- Poor quality environment built and natural
- Contracting town centre
- Fragmented community facilities

The key opportunities are:

- Attractive rural setting and location on the Ebbw Fach trail
- Heritage interest
- Active and supportive community

These issues and opportunities can be grouped into themes from the Community Strategy under which the various regeneration projects will emerge.

Theme 1: Creating communities that people enjoy and want to live in

Theme 2: Offering opportunities, support and resources in our communities for people to thrive

Theme 3: Improving our environment today for tomorrow

Section D: IMPLEMENTATION

This Action Plan has been produced in response to a recognised need in the ward of Blaina for a co-ordinated approach to the regeneration issues facing the area. The production of this Action Plan should be the start of a period of focussed action in the community.

The Action Plan has not identified one major physical intervention for the ward of Blaina. Instead a range of projects is proposed which together will improve the settlement and tackle different issues in different areas.

Co-ordination between those who will be implementing the different projects in this plan is fundamental. To this end an Implementation Group will be established and representatives from the lead organisations will be invited to be part of this group. As new projects emerge the membership of the Implementation Group will change.

Blaenau Gwent County Borough Council will be an important driver of the Action Plan and the lead on specific projects. However, where projects are driven by other organisations, BGCBC will take more of an enabling and supporting role by assisting the community and partners agencies to deliver the project. Blaina Communities First will be crucial in working with the community throughout the delivery of many of the projects.

The Action Plan is intended to direct investment in the ward of Blaina over the next ten years. Some of the projects are linked and should be co-ordinated in terms of timing. However, in most cases the sequence in which the projects are undertaken is not a fundamental factor. The projects have been categorised in to short term projects (1-2 years) which have been coloured green, medium term projects (3-5 years) which have been coloured amber and long term projects (over 5 years) coloured red.

ACTION PLAN PROJECTS

THEME 1: CREATING COMMUNITIES THAT PEOPLE ENJOY AND WANT TO LIVE IN

No	Project Title	Location	Description	Key partners	Funding	Priority	Timescale
B1A	Strengthen Blaina Chamber of Trade	Town Centre	To bring together town centre business to promote the town and retail offer to residents and the wider area	BGCBC Traders	BGCBC	High	Short
B1B	Kings Head	Town Centre	To improve the appearance of the town by the removal of this dilapidated building	BGCBC UWHA	BGCBC HOVP UWHA	High	Short
B1C	Invest in town centre properties	Town Centre	To target commercial improvement grants to town centre businesses	BGCBC Traders	BGCBC HOVP	High	Short/Medium
B1D	Street Art	Town Centre	To create artwork on hoardings to brighten boarded up shops	Communities First BGCBC Shopowners	BGCBC CF	High	Short
B1E	Improve cleansing	Throughout ward	To improve cleansing throughout the ward in particular the town centre	BGCBC TRA	BGCBC	High	Ongoing

No	Project Title	Location	Description	Key partners	Funding	Priority	Timescale
B1F	Boundary improvements	Town Centre	Improve boundary fences and walls to enhance the environment. To include fence alongside medical centre and repainting steel railings by northern roundabaout.	BGCBC Medical Centre	Private HOVP BGCBC	High	Short
B1G	Improve signage	Town Centre	Replace/clean highway signs	BGCBC Town Council	BGCBC	Medium	Short
B1H	Public Art	Throughout ward	To commission public art	BGCBC CF TRA	HOV Arts Council	Medium	Medium
B1J	New uses for key vacant buildings	Town Centre	There are a number of vacant and underused buildings in the town centre. New sustainable uses are to be investigated	BGCBC CF Owners Housing Assoc.		High	Medium
B1K	Town Square	Town Centre	To create a space for events and for people to gather. This space also needs to bring people into the town with the inclusion of a feature/facility.	BGCBC Town Council Traders	HOVP BGCBC Traders Town Council	High	Long

B1L	Gasworks Site	Westside	Bring former gas works site in to use	Transco BGCBC		Low	Long
B1M	Integrated Childrens Centre	Blaina South	Should the building become available to consider alternative uses	BGCBC CF		Medium	Long
V1A	Manage Car Parking	Town Centre	To improve signage and existing car parking provision in the town centre To enforce existing traffic orders To investigate excessive speeds in the car park	BGCBC Gwent Police Traders	EU HOV BGCBC	Medium	Short
V2B	Pedestrian Signposting	Town Centre	To update finger signposting from the main car park to the facilities within the town centre	BGCBC Traders Town Council		High	Short
V3C	High Street	Town Centre	To improve the High Street for all users – pedestrians, retailers and vehicles. This project links with the Town Square project in Theme 1. To include consideration of narrowing pavements, on street parking, traffic calming and one way system	BGCBC Highways BGCBC Regeneration Blaina Chamber of Trade Town Council	EU HOV BGCBC	High	Medium

V4D	Residential Car Parking	Throughout ward	To investigate opportunities to alleviate parking problems in residential streets	BGCBC Housing Associations		Low	Medium
L1A	Community Building	Westside	Provision of a new community building	WAFTRA Communities First Housing Assoc.		High	Short
L2B	Replica Signalbox	Westside	To create a replica signalbox on the line of the Ebbw Fach Trail	WAFTRA Communities First Ebbw Fach Trail group		Low	Short
L3C	Skate Park	Town Centre	To improve the use of the skatepark including lighting and more ramps.	CF BGCBC		High	Short
L4D	Upgrade play area at the Pavilion	Westside	Play area at the pavilion is in need of modernisation	CF BGCBC		Low	Medium
L5E	Youth Facilities	Town Centre	To provide a youth shelter in the Town Centre and to provide adequate youth provision across the ward	BGCBC CF Safer Blaenau Gwent		High	Medium

L6F	Lighting at MUGA	Town Centre	To provide adequate lighting	BGCBC CF, Safer Blaenau Gwent		High	Medium
L7G	Rugby Ground		To improve facilities at the Rugby ground	Blaina RFC CF BGCBC	Lottery WRU CF	Short	Medium
L8H	Provision of a new play area in the town centre to bring people into the town	Town Centre	To consider a play area as part of a town centre square	BGCBC CF		Medium	Long
L9J	Review of community centre provision	Throughout ward	To investigate current provision and agree a long term plan for repair, replacement and closure	CF BGCBC		High	Long
L10K	Play area	Blaina South	To consider improved provision in this area	CF BGCBC Town Council		Medium	Long
L11L	BMX track	Blaina South	To investigate the feasibility of providing a BMX track	CF BGCBC		Medium	Medium

THEME 2: OFFERING OPPORTUNITIES, SUPPORT AND RESOURCES IN OUR COMMUNITIES FOR PEOPLE TO THRIVE

No	Project Title	Location	Description	Key partners	Funding	Priority	Timescale
2A	Chartist Information Centre	Town Centre	To provide a good quality visitor experience in the refurbished Salem Chapel and to promote the facility	Nantyglo & Blaina Charter Group Ebbw Fach Trail Group BGCBC Town Council	VRP BGCBC	High	Short
2B	Promote and sustain fishing at Cwmcelyn Ponds	Cwmcelyn	To work with other angling associations to jointly promote facilities	Angling Association Cwmcelyn TRA	SPLASH	Ongoing	Short
2C	Ebbw Fach Trail	Westside & Cwmcelyn	To promote the trail to residents of Blaina	Ebbw Fach Trail Group		Ongoing	Short
2D	Interpretation Panels	Main Car Park, Town Centre	To design and install a heritage interpretation panel in the main car park	Charter Group Town Council BGCBC Blaina Heritage Action Group	HOVP	High	Short
2E	Heritage Centre	Town Centre	To improve promotion of the Heritage Centre	Blaina Heritage Action Group		Medium	Short
2F	Community Farm and Trekking Centre		To commission a feasibility study of establishing a community farm and trekking centre	BGCBC CF		High	Short
2G	BUZZ	Town Centre	To develop the BUZZ social enterprise and promotion of bike hire	BUZZ CF BGCBC		Medium	Short

2H	Links between the town and Ebbw Fach Trail	Town Centre	To ensure that users of the Ebbw Fach Trail are encouraged to visit the town. Use of information panels and good links to play a role	Ebbw Fach Trail Group CF BGCBC	VRP	High	Short
2J	Camping Site	Throughout	To investigate the feasibility and location of creating a camp site within the ward	Private individual BGCBC Town Council CF		Medium	Medium
2K	Visitor Accommodation	Throughout	To encourage and support establishing suitable visitor accommodation	BGCBC Visit Wales Private sector		Medium	Medium

THEME 3: IMPROVING OUR ENVIRONMENT TODAY FOR TOMORROW

No	Project Title	Location	Description	Key partners	Funding	Priority	Timescale
3A	Ebbw Fach river	Westside	To improve biodiversity	BGCBC TRA Environment Agency	VRP Keep Wales Tidy Splash	High	Short
3B	Increase biodiversity	Ward wide	Creation and enhancement of habitats to improve biodiversity in line with local and national biodiversity targets	BGCBC CF Forestry Commission		Medium	Medium
3B	Improve greenspace	Throughout ward	To identify key areas of open space that have or require improvement and to identify appropriate maintenance or improve the area	TRA CF BGCBC	HOVP VRP	Medium	Medium

Appendix 2


ABERTILLERY - OCCUPIER REPORT
ABERTILLERY
(ABERTYLERI)
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1. Purpose

The decline of Blaenau Gwent's town centres has been recognised and identified by Blaenau Gwent County Borough Council's strategic assessment of risks and challenges, and their revitalisation is a priority for the Council.

A number of key strategic regeneration projects are being implemented across their town centres which have a focus on environmental improvements, enhanced visitors infrastructure and the redevelopment of key sites that are close to a number of town centres. In addition to the physical investment taking place, the Council wants to promote the town centres to investors so that there is a co-ordinated approach to physical regeneration and local investment.

The key objectives of this report are therefore:

- To establish an accurate picture of the potential investors that could be attracted to the County Boroughs town centres;
- To target and attract increased retail/mixed use/other investment to the town centres utilising a professional and consistent promotion method; and
- To develop and promote the identified retail hierarchy and complementary roles of our town centres as outlined in the draft deposit BGCBC LDP.

Not a specific task of the Occupier Suitability Report, but linked to the overall project is also the need to develop a Marketing Strategy/Plan which aims to engage and attract both the private sector and members of the public towards the various opportunities within the Town Centres. There is therefore a direct relationship between the Report and the Marketing Strategy/Plan as it provides the current mix of town centre occupiers, potential targeted retailers and investors and finally how the future role and function should be projected to shoppers and to investors. This body of analysis is therefore important to how any town centre brand or marketing strategy is developed and responds to the actual investment opportunities and fulfils the respective role and function of each town.

2. Process & Methodology

In support of preparing a Marketing Strategy for the town, this Occupier Suitability Report sets out the following:

1. Current retail offering within the town;
2. Identifies potential gaps in retail offering in terms of sector and also potential specific retailer identity.

In preparing the Report, the following activities have been undertaken:

- Familiarisation/Information Gathering
    - Detailed site visits to the five town centres;
    - Photographic records of all shop fronts;
    - Obtained occupier data from the current Valuation Office Rating List;
    - Valuation Office information was cross checked with information from site visits; and
    - Categorise occupier lists and input into a database.
- Analysis/Occupier Interviews
    - Analysis of occupiers by sector, category and retailer identity using filters and sorting techniques;
    - Identify retailers with requirements for towns in South Wales and also focusing on towns in Valleys locations;
    - Analysis of other towns to identify retail gaps (Blackwood, Merthyr Tydfil, Abergavenny) as well as detailed analysis of other towns in Blaenau Gwent to identify which retailers are in one town but not others;
    - Direct contact with retailers to establish requirements for towns;
    - Contact with selected stakeholders and investors; and
    - Interviews with a sample of local businesses and business forum representatives.
- Reporting
    - Report on retailer feedback;
    - Review of existing vitality and viability data held by the Council;
    - Analysis of town centre data to identify distinctive clusters;
    - Assessment of the role and function of the town centre;
    - Identify retailers with potential requirements for the town over timescales; now, 2011-2016 and 2016-2020; and
    - The report has also considered the current development opportunities presenting themselves within the town and commented as to potential retailer suitability.

3. Abertillery Town Centre

3.1. Strategic Context

The town of Abertillery sits alongside the A467, which is the main transport corridor linking the Heads of the Valleys with the Ebbw Fach and Ebbw Fawr valleys. The town has a population of 16,663[1] with its main catchment covering the settlements of Cwmtillery, Abertillery, Six Bells and Llanhilleth.

To the north of the town are the town centres of Blaina and Brynmawr. In addition to the town centre there is an edge of centre retail park known as Lakeside Retail Park which is located at Brynmawr within a 10 minute drive of Abertillery. To the south, the A467 and A472 connects the town with Pontypool, Blackwood, Cwmbran, Newport and Cardiff.

Abertillery is the third biggest town centre within Blaenau Gwent, with a total retail floorspace identified in the study area of 171,417 sq.ft[2]. The main town centre is accessed from Castle Street and from Foundry Bridge with the main shopping streets centred around Church Street and High Street. Other streets that feed into the main primary shopping area include Market Street, Mitre Street, Somerset Street and Carmel Street. A Victorian arcade, the second oldest in Wales, connects Somerset Street with High Street. The multi storey car park is accessed off Division Street and High Street. Another large car park is accessible off Division Street, and smaller car parks are nearer to the Metropole Centre and off King Street.

The strategic location of the Iceland food store on High Street provides shoppers with town centre located food shopping . The medium size edge of centre supermarket, Tesco is located just off the A467, being accessed from Castle Street. A number of key services are located in or near to the town centre including a health centre, library, Council administrative offices, museum and a number of places of religion, a theatre and arts centre, amongst others. A weekly market is held on a Thursday in Church Street selling fresh produce, clothing and household goods.

Figure 1: Images of Abertillery Town Centre

Source: Miller Research (UK) Ltd

1 2001 Census
2 Stuart Hogg Property / VOA data

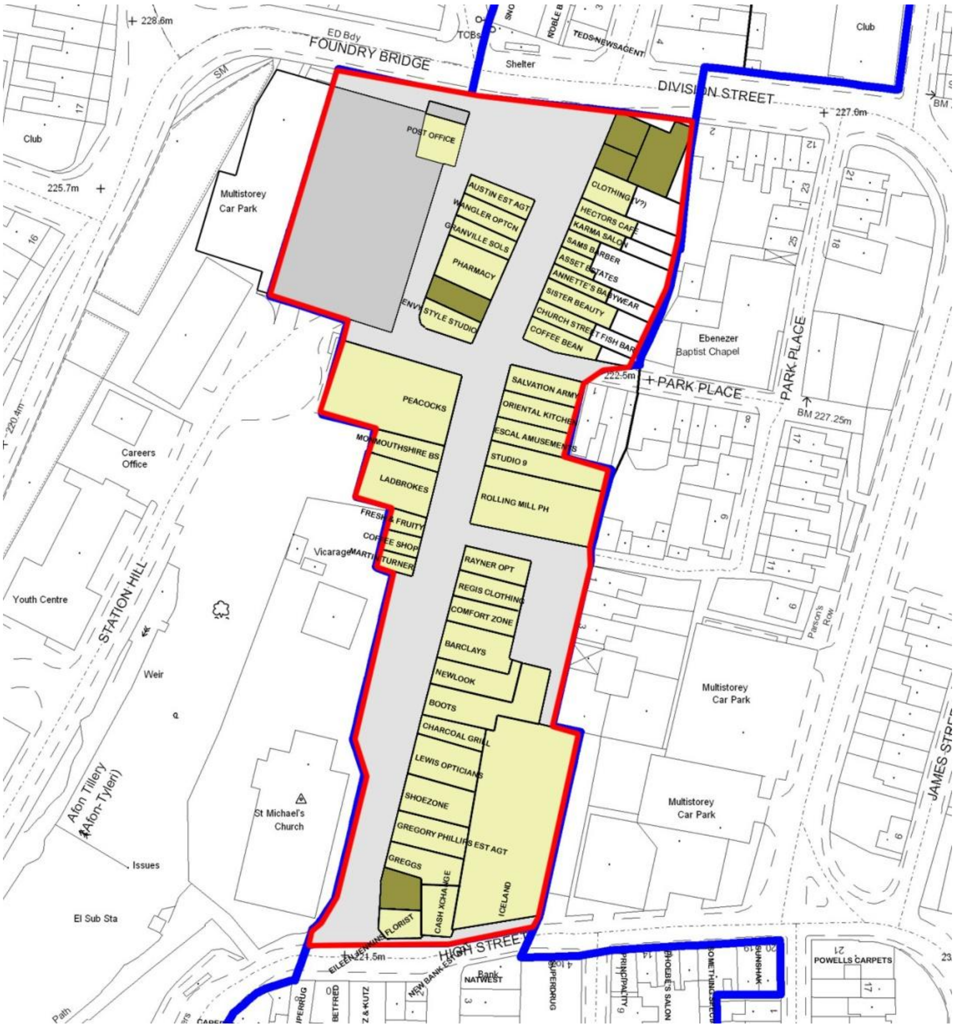
3.2. Headline Statistics

The following table presents the key retail statistics for Abertillery with Figure 1 below showing the draft depositLocal Development Plan Primary Retail Area and the location of vacant buildings as of 25th January 2011.

Table 1: Abertillery - Retail Statistics

Total floor area of retail space	**15,925 sq.m**
Number of retail units	127
43 units in Primary Retail Area	(5,882 sq.m)
84 units outside of Primary Retail Area	(10,043 sq.m)
Number of Vacant Units	21 (17 outside of Primary Retail Area, 4 in Primary Retail Area) with a total of 1,935 sq.m which equates to **12%** of the total retail space

Figure 1: Abertillery - Primary Retail Area showing vacant units as at 25 January 2011 (dark)



Source: Stuart Hogg Property, January 2011

3.3. Vitality and Viability – Key Headlines

The following summary is drawn from existing retail studies[3] that have been provided by Blaenau Gwent County Borough Council and observations from site visit during january 2011:

Shoppers' Attitudes

- CACI data compares Abertillery to centres such as Blackwood and Monmouth in its rural classification;
- CACI's Retail Footprint model shows that Abertillery's retail catchment contains 191,302 residents with annual total expenditure of £405.1 million;
- Abertillery's town centre captures 6% of this expenditure, representing £22.5 million of comparison spend per annum;
- 31% of respondents to a CACI household telephone survey indicate they conduct their main food shop at the Tesco Store in Abertillery, with 34% of respondents shopping at the Asda store in Brynmawr;
- When asked about top up food or convenience shopping, 24.7% undertake this in the Tesco in Abertillery, with 17.2% shopping at the Somerfield in Abertillery and 16.7% in other local stores;
- Cwmbran shopping centre is the most popular location for non-food items at 28.4% with Newport and Cardiff being key attractors at 17.2% and 14.8% respectively;
- 78.8% of all respondents surveyed visit Abertillery for their shopping. 56.3 % of the 197 respondents who visited Abertillery stated that the main reason was due to the closeness and or convenience to their home;
- 39.6% of respondents, when asked what would make them visit the area more frequently identified a better choice/range of non-food shops;
- When asking shoppers on street in Abertillery, 30.7% of respondents visit the town centre for non food shopping;
- Due to the close proximity of residential areas to the town centre, 49.5% access it on foot with 27.7% travelling by car/van; and
- 86.1% of shoppers state that the range of shops as being either poor or very poor, similarly on choice of shops. When asked what would improve people's visit to Abertillery, 91.1% and 80.2% identified a better choice/range of non-food and food shops, respectively.

Accessibility

The town centre is located on a hill above the Afon Tyleri with the most level section of the town centre being the pedestrianised Church Street. This lends itself to being the primary retail area due to its accessible nature. Somerset Street, Mitre Street and Market Street tend to follow the contours of the hillside with High Street gradually climbing up through the town centre. The main car park is off Division Street which is part surface level and undercroft parking. The main bus stops are situated on the lower end of High Street which supports local and regional bus services.

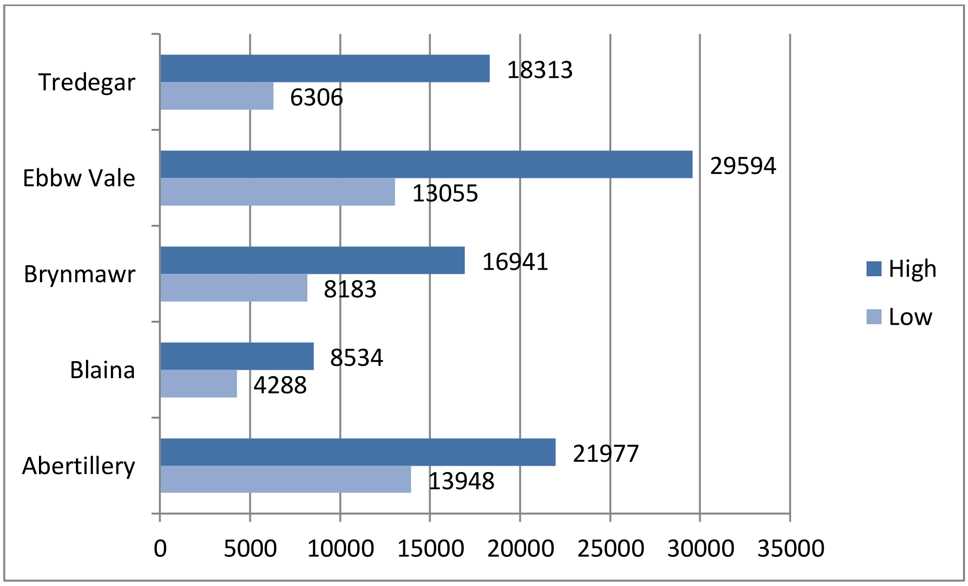
Footfall

Due to the accessible and pedestrianised nature of Church Street this tends to be the main concentration of pedestrian activity. The section of High Street linking the main car park, the Iceland food store and

[3] CACI Town Centre Health Checks, January 2008

Church Street is busy. Pedestrian counts for 2009-2010 show that Abertillery draws in reasonable footfall compared to larger centres such as Ebbw Vale and Tredegar in terms of retail floorspace.

Figure 2: Pedestrian Footfall Figures, Blaenau Gwent Town Centres

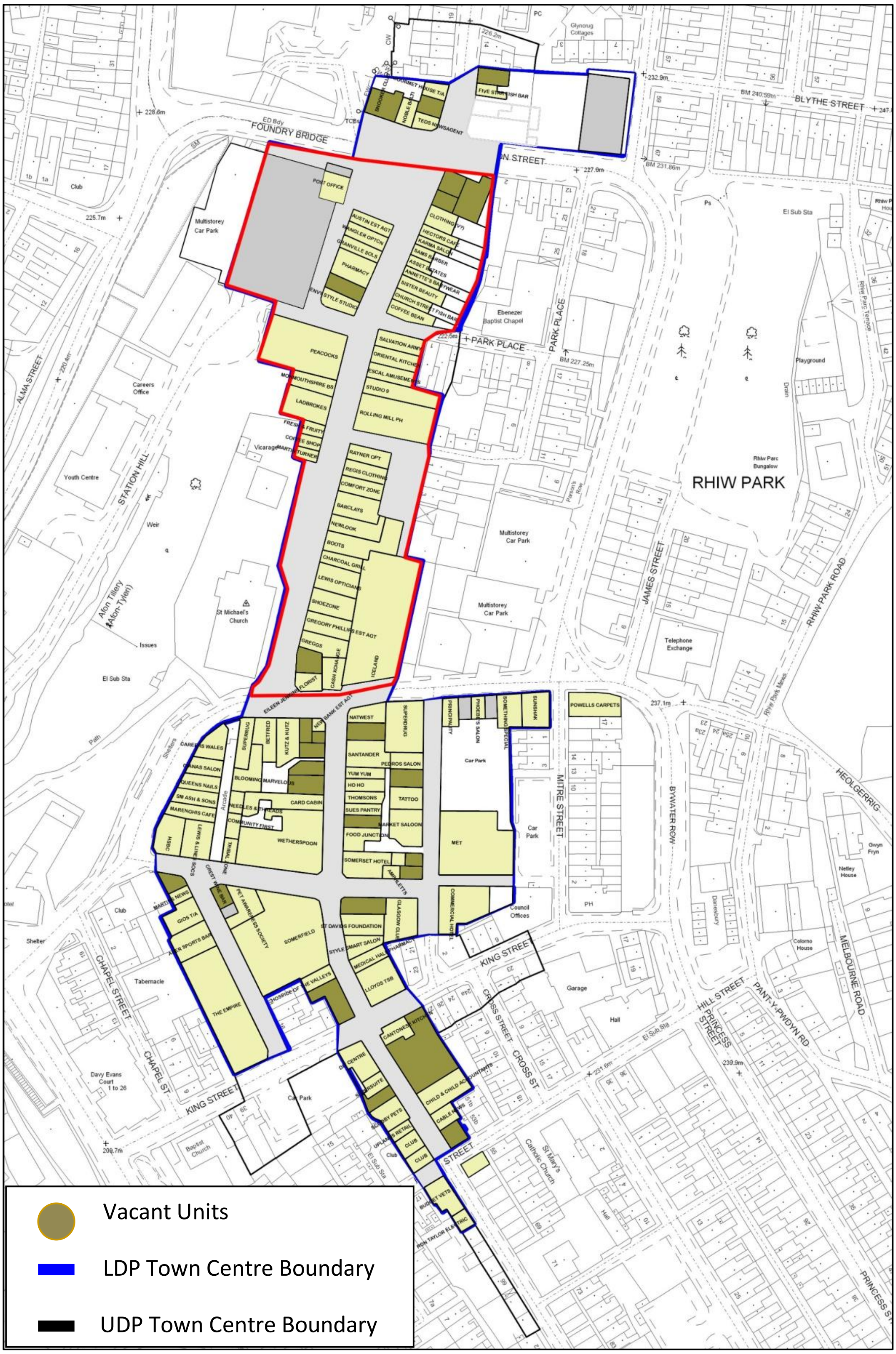


Source: Blaenau Gwent Pedestrian Footfall Counts (April 2009 – March 2010)

4. Town Analysis Maps

The following analysis develops the initial retail statistics in relation to the distribution of vacant units, presence and location of national retailers and where non A1 tends to be situated.

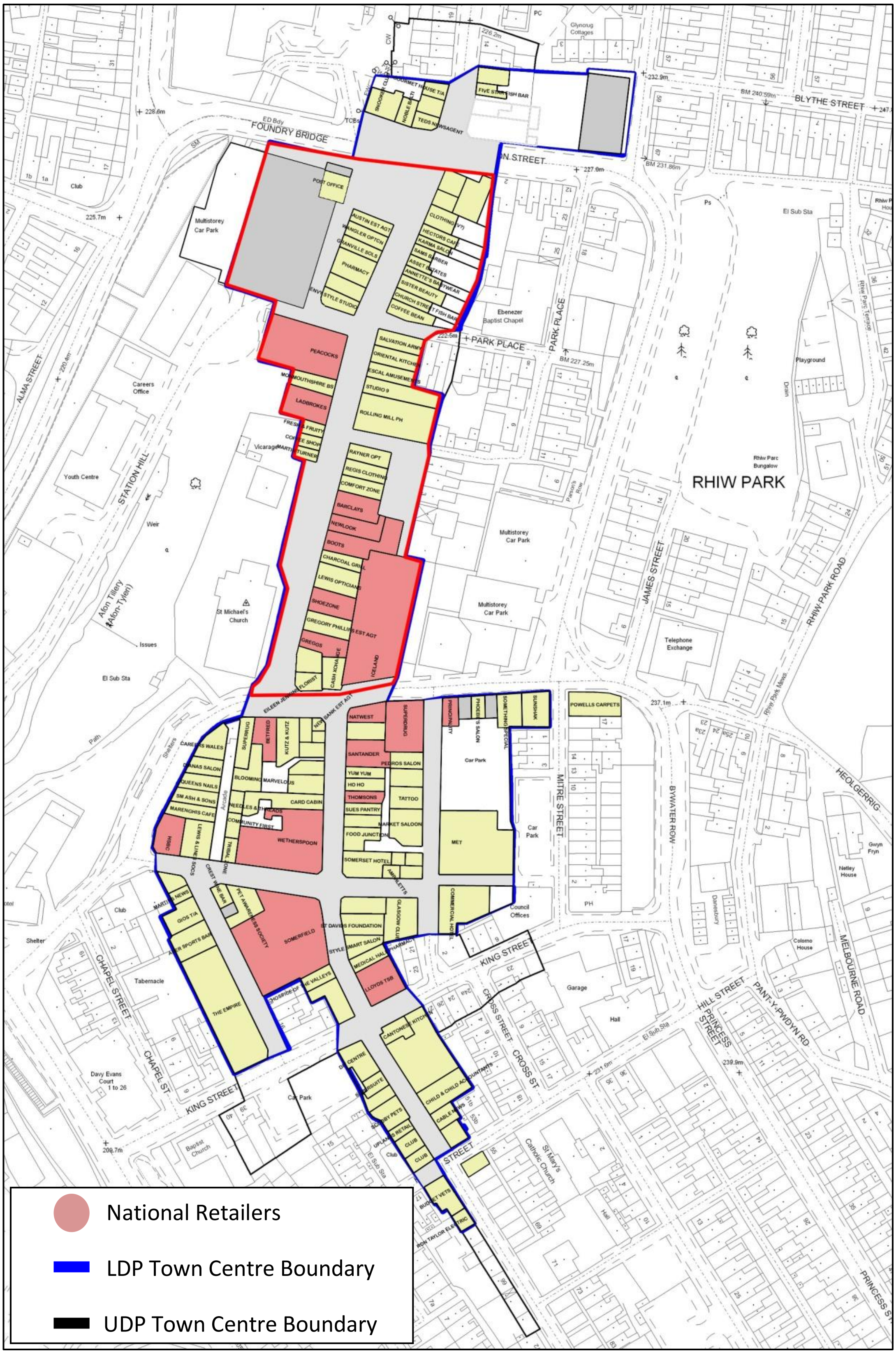
Figure 3: Location of Vacant Units, Abertillery



Source: Stuart Hogg Property, January 2011

The Vacant Unit Analysis Map shows a good level of occupancy in the primary retail area. There are lower levels of occupancy to the southern section outside the primary retail area. The corner property on Church Street / Commercial Street is a small florists and adjacent to that is a vacant unit (former Ferrari Bakery) that has been vacant for some time although has current interest .

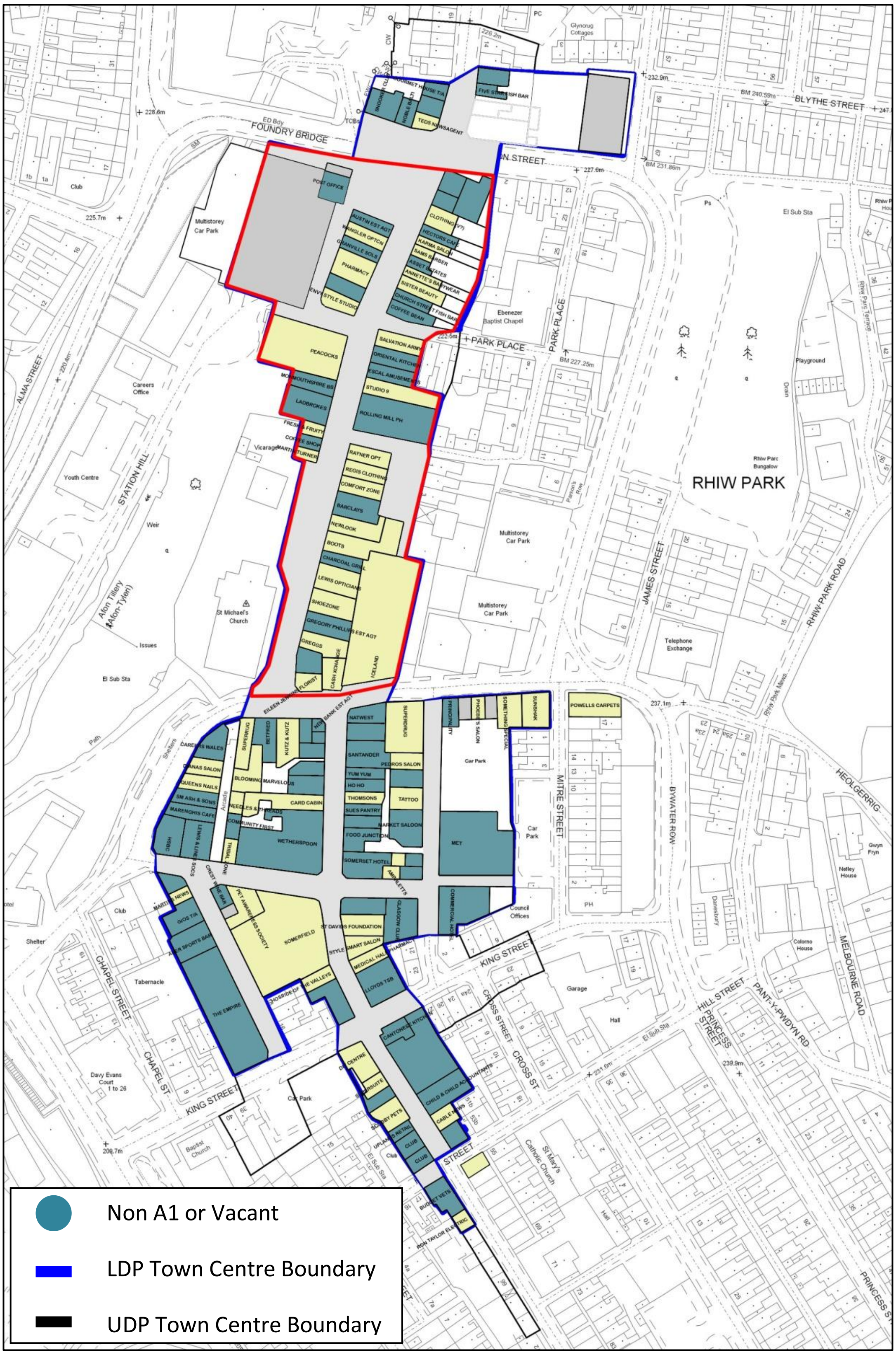
Figure 4: Location of National Retailers, Abertillery



Source: Stuart Hogg Property, January 2011

The National Retailer Analysis Map shows a moderate level of national operators mainly focused around the southern junction of Church Street and Commercial Street.

Figure 5: Location of Non A1/Vacant Property, Abertillery



Source: Stuart Hogg Property, January 2011

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The Non A1 and Vacant Analysis map shows a reasonable mix along Church Street although the southern section of the retail area has a low level of A1 retail.

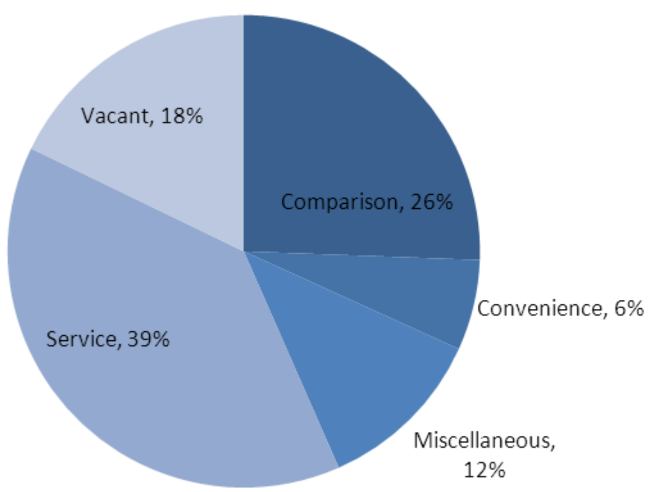
4.1. Category Analysis of Occupiers – Abertillery

Table 2: Occupier Analysis - Retail Category - Abertillery

Category	Data	Total
COMPARISON	Count of Occupier	33
	Sum of Total area m2	3,799
CONVENIENCE	Count of Occupier	8
	Sum of Total area m2	2,843
MISCELLANEOUS	Count of Occupier	15
	Sum of Total area m2	2,983
SERVICE	Count of Occupier	50
	Sum of Total area m2	4,448
VACANT	Count of Occupier	23
	Sum of Total area m2	2,152
Total Count of Occupier		**128**
Total Sum of Total area m2		**16,225**

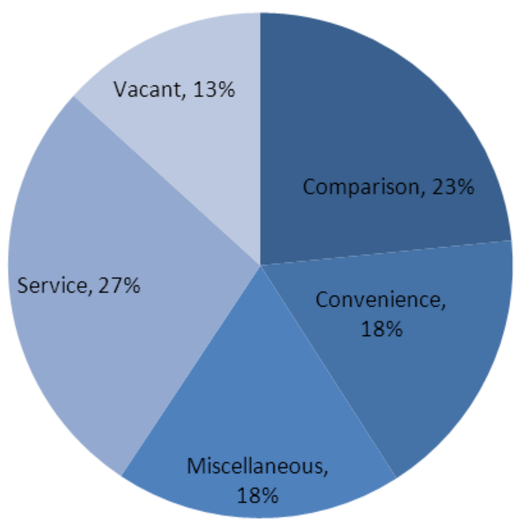
Source: Stuart Hogg Property, January 2011

Figure 6: Number of Units



Source: Stuart Hogg Property, January 2011

Figure 7: Percent of Floor Space



Source: Stuart Hogg Property, January 2011

The following tables show the breakdown of occupiers (as at January 2011) by specific uses (total ground floor area and number of units). Dominant retail sectors are highlighted in the table.

Table 3: Breakdown of Occupiers by Retail Sector - Abertillery

Sectors	Sum of Total area m2 Total	Count of Occupier Total
ART / BOOKS / STATIONERY	33.4	1
ARTS / THEATRE	400	1
BABYWEAR	56.32	1
BAKER	50.14	1
BETTING OFFICE AMUSEMENTS	362.69	3
BUTCHER	50	1
CAFÉ	294.65	5
CHARITY	420.18	3
CHEMIST / OPTICIAN	**882.7**	**7**
CTN	122.2	3
ELECTRICAL	73	1
ESTATE AGENT	244.64	4
FINANCIAL SERVICES	**1180.8**	**8**
FLORIST	101.21	2
FOODSTORE	2593.4	2
FOOTWEAR	244.3	1
FURNITURE	184.84	3
GENERAL CLOTHING	808.5	2
GIFTS	226.33	4
GREENGROCER	27.16	1
HARDWARE	230.25	2
MUSEUM	400	1
OFFICE	**527.19**	**6**

PETS	163.19	2
PUB (inc WINE BARS, CLUBS, HOTELS)	**2825.53**	**12**
SALON	**714.28**	**12**
SPORTS	171.9	1
TAKEAWAY	**607.34**	**12**
TEXTILES	55.61	1
TRAVEL	82.01	1
VACANT	1961.28	22
VARIETY	70	1
WOMENS CLOTHING	246.03	3
Grand Total	**16225.43**	**128**

Source: Stuart Hogg Property, January 2011

4.2. Distinctive Clusters

Figure 8 shows that as in the case of the other four town centres, Abertillery is well represented in hair and beauty offer with salons, nail and tanning parlours across the town centre. There is a good range of cards and gifts including cultural crafts and gifts.

Furniture and household goods is also a focus in the town with Comfort Zone, Powells Carpets, Super Rugs, DIY Centre, Supersuites, Ron Taylor Electrics and Aladdins Cave. There is a good range of cafes with Marenghi's in the Arcade and The Coffee Bean and Hector's Cosy Cafe in Church Street. Other coffee shops include The Coffee Shop on Church Street and Sue's Pantry on Somerset Street. The two florists, Eileen Jenkins and Blooming Marvellous, add colour and a personal touch to the overall shopping experience.

In terms of creating an independent and speciality theme within the town centre, the shopping streets of Commercial Street, Church Street, Market Street, Somerset Street and the Arcade have the potential to create a distinct experience, subject to frontage improvements and attracting the right mix of retailers. The town centre is lacking in additional arts and crafts, speciality food, and other bespoke items but these browse type shops would only be viable if other staple retailers are located in the town centre, to achieve the right level of footfall and activity.

Figure 8: Distinctive Clusters - Abertillery

Source: Miller Research (UK) Ltd

5. Market Commentary

Aside from significant investment in public realm and civic space projects, Abertillery has seen limited commercial development since the development of the Tesco store. The primary retail area of Church Street functions reasonably well and has limited voids. The southern part of the town, however, has suffered and has limited A1 retail activity.

Due to its location, the town is impacted by larger towns to the north (Ebbw Vale and Brynmawr's Asda / Lakeside Retail Park). The town has seen a number of closures in recent years (Fads, Woolworths) however the former Woolworths is now occupied by Iceland while the Fads unit remains vacant.

The imminent closure of the HSBC will impact on the southern part of the town centre in particular. It should be a priority to try and promote the large vacant units in the town and consider ways in which they can be redeveloped. The Original Factory Shop have confirmed they are taking the old Somerfield, which should ensure that the town is not impacted by another large vacant unit and will help to retain trade within the town centre. It could also mean that there is an opening for a small convenience store in town (One Stop or similar).

Many of the retail units on Church Street are small and better suited to independent retailers rather than nationals.

The vacant former Ferrari unit has current interest and this will see the whole of the southern part of Church Street occupied.

Zone A rents - a measure of value for retail space are currently in the region of £170 per sq.m for prime units.

Key new lettings in Abertillery over the last 5 years include (non-exhaustive):

- 31-32 High Street (former Woolworths - let to Iceland)
- 3 Church Street (Greggs)
- 33 High Street (Cash Xchange)
- 9 High Street (Betfred)
- 19 Somerset Street (Food Junction)
- 14-20 Somerset Street (former Poundline, now J D Wetherspoon)

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6. Demand

We have not been able to identify any current active requirements for high street units in Abertillery, however, any marketing strategy could potentially attract requirements that are more regionally based and provided the focus on improving the town centre continues it is reasonable to assume that additional interest could be generated in the medium to longer term.

Please see Appendix (1) for full occupier responses received.

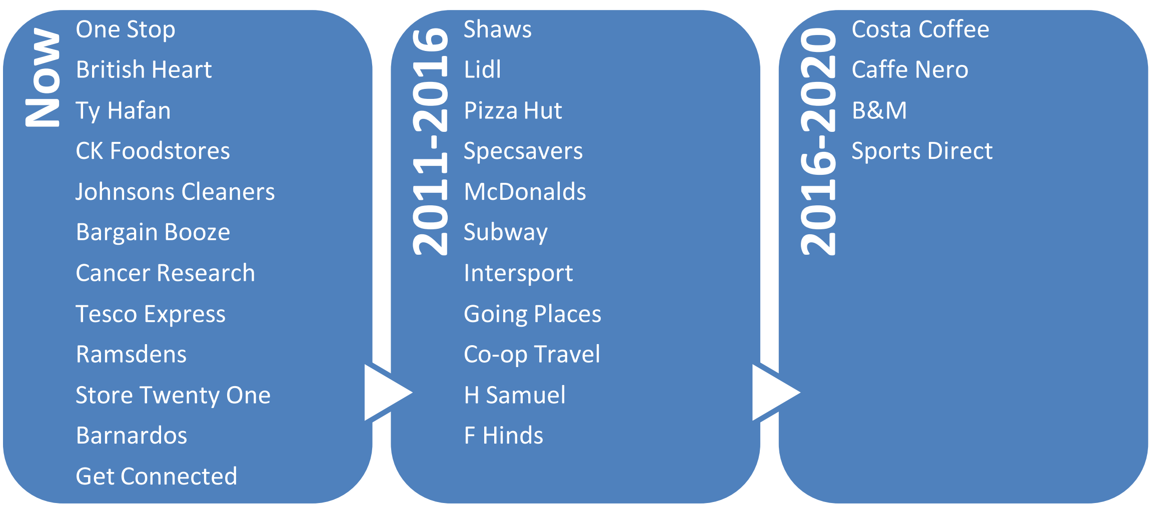
7. Gap Analysis

Retailers / types of retailers that are not represented or under-represented in the town that could be targeted and offer opportunities :

- Butcher (only one currently)
- Convenience food retail
- Off license (no representation)
- Jeweller (no representation)
- Electrical
- Motor spares
- Toys and games
- Sports
- Book Shop
- Camping / outdoor
- Travel agency (only one)
- Phone shop
- Launderette / Dry Cleaning
- Recruitment
- Textiles
- Charity (higher quality)

Having carried out the gap analysis and retailer consultation, examples of the retailers that could be targeted over the short / medium / longer term would be as follows:

Figure 9: Future Timeline for Targeting Occupiers - Abertillery



8. Availability

Properties that are currently being actively marketed are as follows:

- 39-47 Somerset Street - this vacant unit (formerly Fads) comprises a ground floor sales of 3,726 sq.ft and a first floor ancillary of 3,434 sq.ft - the quoting rent is £25,000 per annum and the Rateable Value of £13,250 (£5,419 payable 2010/11). Available on a new lease.
- 46 Church Street - a vacant unit with a ground floor sales area of 425 sq.ft plus store of 138 sq.ft and upper floors residential. The shop has a Rateable Value of £3,700 (£1,513 payable 2010/11) and the quoting rent is £15,000 per annum. The unit has planning consent for A3 use.

There are a number of retail units that are vacant but do not appear to be actively marketed.

9. Abertillery – SWOT Analysis

Table 4: SWOT Analysis - Abertillery

Strengths	**Weaknesses**
Traditional market town potential Interesting street layout Relatively strong core at Church Street Low rents Free parking	Poor retail offer in southern part of town Fabric of buildings is poor in specific frontages Large vacant units both in the primary retail area and outside of it Edge of centre Tesco has limited linkages to the town centre Shutters creating dead frontages Limited spending power Small units not suitable for many national retailers Town is hidden from passing traffic Topography constrains development and opportunity Disconnected Tesco from Town Centre Signage is poor and lacks co-ordination
Opportunities	**Threats**
Develop shopping experience Market town potential in terms of branding Create street bustle Potential for interesting street scenes External funding and investment through EU funding for improved public realm, traffic management and signage over next 4 years worth £12million Opportunities to create clear linkages with Tesco	Competition from neighbouring centres Continued vacancy

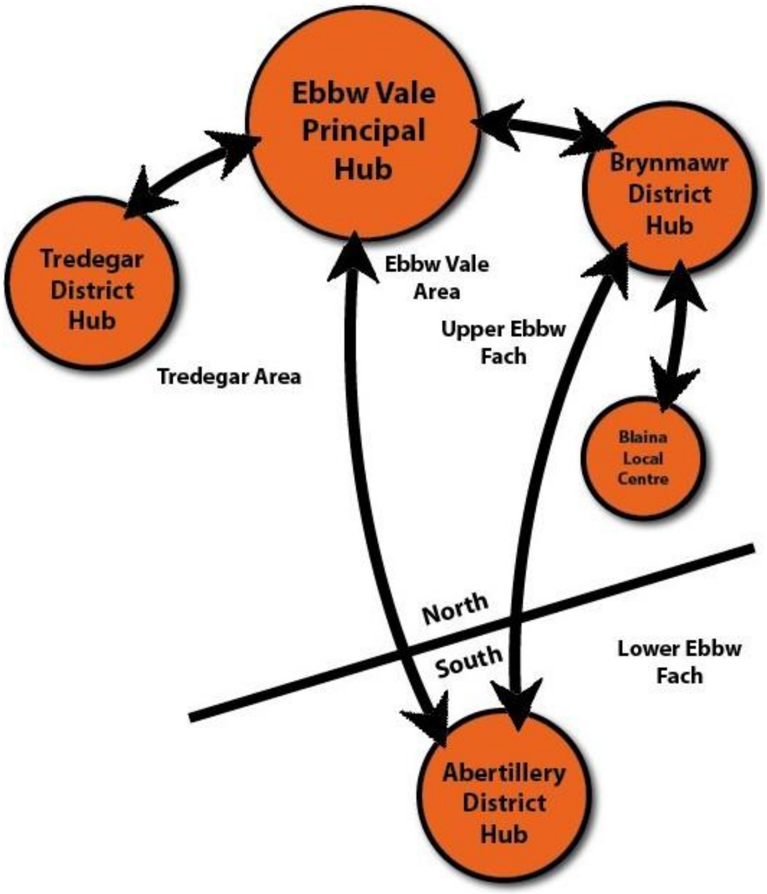
10. Appraisal of Development Opportunities

The vacant units at the top end of Church Street are owned by Blaenau Gwent County Borough Council and will benefit from a property enhancement scheme. There is an opportunity, to create a destination building here, potentially with a food offer to encourage footfall along the length of Church Street. The Council is planning consultations on the future use of this building.

11. Role and Function

The Council has sought through this study to further develop specific and complementary retailing roles and functions for each of the five town centres that can be utilised in the development of the town centre branding and associated marketing material.

Figure 10: Proposed Retail Hierarchy – Role and Function – Draft Deposit Local Development Plan 2011



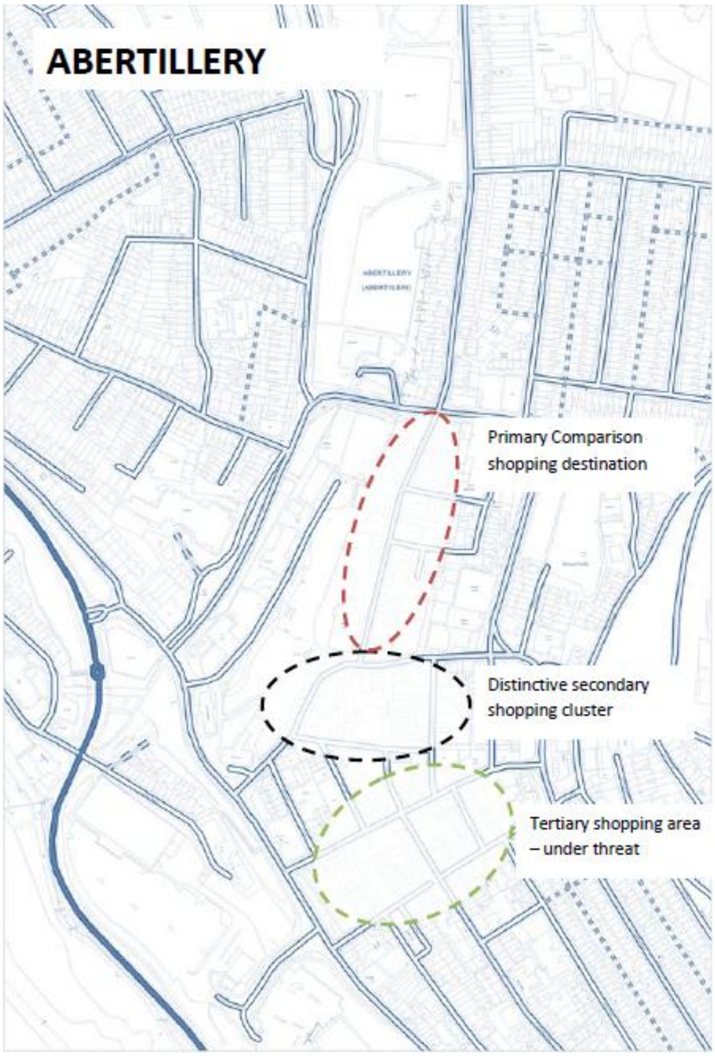
The location of Abertillery in the lower Ebbw Fach valley does naturally present itself as a district centre due to its geography, a tight shoppers' hinterland and the physical layout constraints of the town centre. Shopping surveys tend to re-enforce the role of the town as a district centre with people reverting to the town centre for mainly comparison shopping, with the majority of food shopping at Tescos at the edge of centre town site and Asdas at Lakeside, near Brynmawr. Its proximity to the A467 and A472 also results in people shopping in Blackwood and Cwmbran for "High Street" comparison brands as well as further afield in Cardiff and Newport.

The town centre does fall in two areas, which does limit the capacity of retail space which tends to contribute to its district role and character. Church Street is the main primary retail area with only a couple of vacancies, at the strategic ends of the Street. The southern edge of the town centre due to its denser urban street form has suffered in recent years and weeks with the closure of Fads and recently with Somerfields and HSBC leaving the town centre. The lack of off street parking, servicing and wide frontages as well as pedestrian/vehicular conflict does not create the right conditions for investment with future traffic management and land assembly being important to create an accessible and commercially viable secondary retail area.

The need to provide a town centre “basket” type food store is key to anchoring the town centre retail offer and adding to the existing Iceland store. The need to improve and extend the range and choice of comparison retailers is required with some missing or under represented retailers to be targeted. These include jewellery, electrical, motor spares, books and textiles being sectors to target. When looking at areas of speciality, the Arcade and the immediate building block and streets has an opportunity to project its distinctiveness with gifts, florists, hair/beauty, wine bar amongst others combining to a key intermediate space in the town that connects the outer tertiary area with the primary retail area. This needs to be developed through commercial improvements to include co-ordinated signage, joint marketing and event based promotion.

The cultural, leisure and tourism role of the town centre within Abertillery is key with a number of facilities provided for. The Metropole Cultural and Conference Centre (Met) offers a Victorian Theatre space for conferences and performances with the Seabourne Gallery and Met Bar hosting smaller events. The building also accommodates Abertillery and District Museum which displays Stone Age artifacts through to valley life memorabilia. To the north west of the town centre, Cwmtillery Lakes provides a fourteen acre open access area for fishing and picnicking. In addition to a number of live music venues in local pubs and clubs, the town also hosts the annual Abertillery Blues Festival.

Figure 11: Analysis Role and Function within Abertillery Town Centre



Source: Miller Research (UK) Ltd

12. Conclusion – Key Recommendations

There is an opportunity for Abertillery to benefit from approved expenditure on regeneration initiatives and also to build on the strength of Church Street. The recent investment by Original Factory Shop as well as Iceland and Wetherspoons indicates a willingness of national retailers to locate in the town centre and despite competition from neighbouring towns, in our view, the prospects for Abertillery looking forward are generally more positive now than during the last 2-3 years.

Specific opportunities and issues to address include:

- Promotion of Church Street as a viable retailing location;
- Investment in the fabric of buildings;
- Reletting prospects generally but specifically former Fads (and possibly HSBC) and buildings in the southern part of the town centre;
- Limiting the number of further non A1 uses in the primary retail area so that a more cohesive range of retail goods and services is presented to shoppers;
- Shutters - discourage external shutters so that the key frontages are attractive during the daytime and in the evening and that the town appears to be open for business;
- The town needs to find its identity to retain local expenditure and present the town as a first choice for shopping so that it competes with town centres such as Blackwood and Cwmbran.

A1 – Retailer Feedback

Retailer Consultation - Blaenau Gwent

Feedback

Feb-11

Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	**Would you consider units in any of the 5 towns? If so, which and what is the requirement?**	**If not, why not?**					
Wilkinsons	Considering Ebbw Vale - requirement is for a unit of around 10,000 sq.ft	Looked at Tredegar but discounted due to size of town and other towns too small.	Yes	No	No	No	No
Greggs	Are in all towns apart from Blaina	Would not consider Blaina as too small	Yes	Yes	Yes	Yes	No
Timpsons	Going into the Tesco store as a kiosk.	Other towns too small. Looked at Tredegar but felt it was covered by neighbouring towns.	Yes	No	No	No	No
Ladbrokes	Currently in all the towns but Tredegar but would not consider Tredegar as there was too much competition.	Too much competition - already catered for.	No	No	No	No	No
Burton / Top Shop	No to all towns.	Market too small in all towns.	No	No	No	No	No

Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	**Would you consider units in any of the 5 towns? If so, which and what is the requirement?**	**If not, why not?**					
BHS	No to all towns.	Market too small in all towns.	No	No	No	No	No
Coffee No.1	No to all towns.	Demographics not affluent enough.	No	No	No	No	No
Caffe Nero	No to all towns.	Demographics not affluent enough - towns too small and their targets are larger towns and cities.	No	No	No	No	No
Shaws	No to all towns.	Currently in Tredegar but trading poorly. No appetite for expansion in these locations. Felt that town centres were not performing well.	No	No	No	No	No
Costa	Would consider Ebbw Vale - would need a unit of 1,300 sq.ft plus in a prime location in town.	Ebbw Vale is a possibility but other towns not perceived to be attractive enough at the moment.	Yes	No	No	No	No
New Look	In all towns except Blaina	Too small	In	In	In	In	No
Subway	In Ebbw Vale, but need new franchisee to reopen	Other towns too small and not affluent enough	In	No	No	No	No

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Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	**Would you consider units in any of the 5 towns? If so, which and what is the requirement?**	**If not, why not?**					
Marstons	Yes to Tredegar, Ebbw Vale requiring circa 1 acre of land on main arterial routes	Abertillery & Blaina too small	Yes	Yes	In	No	No
Cash Generators	In Ebbw Vale, and no to all other towns	Catchment population too small to justify another branch in the vicinity	In	No	No	No	No
Superdrug	Awaiting feedback			In		In	
Marks & Spencer	Awaiting feedback						
Card Factory	In Ebbw Vale and Tredegar. Would consider trialling Abertillery for a 6/12 month period to see if sufficient demand	Blaina is too small. Unsure on Brynmawr and proximity to Tredegar/Ebbw Vale	In	In	Unsure	Trial	No
Lidl	In Tredegar and no to other towns	Other towns have too small a catchment to get board approval at present. This may change in the next 2 years, but is the reason Brynmawr was rejected.	No	In	No	No	No
Aldi	In Ebbw Vale and recently closed Tredegar.	Insufficient population to justify another store in the vicinity.	In	Closed	No	No	No
One Stop	They would consider all towns but each opportunity is considered on its merits and dependent upon competition analysis. Would need a unit of 2,000 to 2,500 sq.ft.	Blaina is unlikely due to existing offering from Co-op and Premier.	Yes	Yes	Yes	Yes	Unlikely
Tesco Express	Awaiting Feedback						

Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	**Would you consider units in any of the 5 towns? If so, which and what is the requirement?**	**If not, why not?**					
Sainsburys Convenience	Not meet their demographics at present. Looked at Woolworths in Ebbw Vale and turned it down, However demand to take 1000 across the country in next few years so will have to consider less desirable opportunities. Therefore if 3500/4000 sq.ft became available in next couple of years would need to consider.		Future	Future	Future	Future	No
Edinburgh Woollen Mill	In Festival Park but not a great success. However landlord gave them a good deal to stay last year and new landlord is working hard on the factory outlet scheme to make it a destination.	The socio demographics of the region and core customer penetration are far too low in Blaenau Gwent. They require 30% ccp whilst Ebbw Vale, Tredegar and Abertillery currently only have 1%ccp.	No	No	No	No	No
Store Twenty One	In Ebbw Vale and Brynmawr. Would take Abertillery and Tredegar. Want between 3000 and 5000sqft ground floor sales and 1500sqft back up. In prime position but difficulty finding size.		In	Yes	Yes	Yes	No
Sports Direct	In Festival Park and also Merthyr. No other requirements.	Not sufficient population to sustain another store in the region. Would not want to relocate from Festival park to town centre as trades satisfactorily at present time	No (in Festival Park)	No	No	No	No
Bargain Booze	In Tredegar and Rassau. They are led by the franchisee coming to them and wanting to become a Bargain Booze store. Cannot be any closer than 1.5 miles from another store	Ebbw Vale too close to Rassau store so franchisee is protected	No	In	Yes	Yes	Yes

BLAINA - OCCUPIER REPORT

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Tables

1. Purpose

The decline of Blaenau Gwent's town centres has been recognised and identified by Blaenau Gwent County Borough Council's strategic assessment of risks and challenges, and their revitalisation is a priority for the Council.

A number of key strategic regeneration projects are being implemented across their town centres which have a focus on environmental improvements, enhanced visitors infrastructure and the redevelopment of key sites that are close to a number of town centres. In addition to the physical investment taking place, the Council wants to promote the town centres to investors so that there is a co-ordinated approach to physical regeneration and local investment.

The key objectives of this report are therefore:

- To establish an accurate picture of the potential investors that could be attracted to the County Boroughs town centres;
- To target and attract increased retail/mixed use/other investment to the town centres utilising a professional and consistent promotion method; and
- To develop and promote the identified retail hierarchy and complementary roles of our town centres as outlined in the draft deposit BGCBC LDP.

Not a specific task of the Occupier Suitability Report, but linked to the overall project is also the need to develop a Marketing Strategy/Plan which aims to engage and attract both the private sector and members of the public towards the various opportunities within the Town Centres. There is therefore a direct relationship between the Report and the Marketing Strategy/Plan as it provides the current mix of town centre occupiers, potential targeted retailers and investors and finally how the future role and function should be projected to shoppers and to investors. This body of analysis is therefore important to how any town centre brand or marketing strategy is developed and responds to the actual investment opportunities and fulfils the respective role and function of each town.

2. Process & Methodology

In support of preparing a Marketing Strategy for the town, this Occupier Suitability Report sets out the following:

1. Current retail offering within the town;
2. Identifies potential gaps in retail offering in terms of sector and also potential specific retailer identity.

In preparing the Report, the following activities have been undertaken:

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  - Detailed site visits to the five town centres;
  - Photographic records of all shop fronts;
  - Obtained occupier data from the current Valuation Office Rating List;
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  - Categorise occupier lists and input into a database.
- Analysis/Occupier Interviews
  - Analysis of occupiers by sector, category and retailer identity using filters and sorting techniques;
  - Identify retailers with requirements for towns in South Wales and also focusing on towns in Valleys locations;
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  - Report on retailer feedback;
  - Review of existing vitality and viability data held by the Council;
  - Analysis of town centre data to identify distinctive clusters;
  - Assessment of the role and function of the town centre;
  - Identify retailers with potential requirements for the town over timescales; now, 2011-2016 and 2016-2020; and
  - The report has also considered the current development opportunities presenting themselves within the town and commented as to potential retailer suitability.

3. Blaina Town Centre

3.1. Strategic Context

The town of Blaina has a population of 4,830[1] with the main town centre situated on the eastern side of the A467 in the Ebbw Fach valley. It is the smallest of the five towns within Blaenau Gwent, positioned between Brynmawr and Abertillery, having a total retail floor space of 53,669 sq.ft[2] in the town centre.

The town centre is centered around High Street with the shopping being linear in nature starting at the northern end with the Co-operative food store and finishing at the southern edge at the junction with Station Road. In addition to the shopping offer, there is a learning action centre, a heritage centre and two main car parks as well as a number of clubs, institutions and community organisations. There is ample car parking off the northern edge of High Street and to the rear of Cross Street.

A key building, the Salem Chapel that is situated in the middle of High Street is undergoing significant renovation with some interpretation of the local heritage and chartist industry being provided, acting as a visitor hub within the town centre.

Figure 1: Images of Blaina Town Centre

Source: Stuart Hogg Property

[1] 2001 Census
[2] Stuart Hogg Property / VOA data

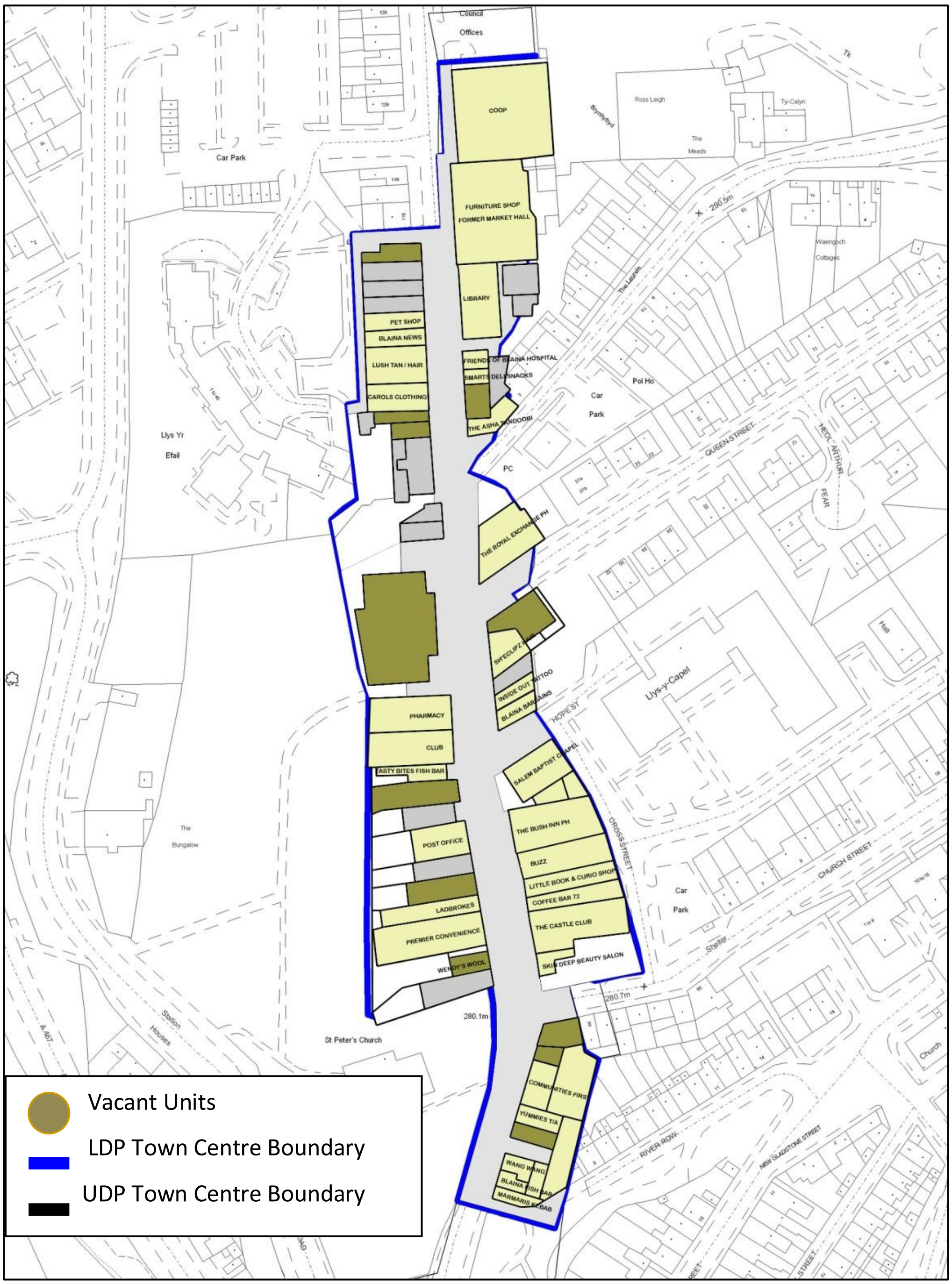
3.2. Headline Statistics

The following table presents the key retail statistics for Blaina with Figure 2 below showing the draft deposit Local Development Plan retail area and the location of vacant buildings as of 25th January 2011.

Table 2: Blaina - Retail Statistics

Total floor area of retail space	**4,986 sq.m (53,669 sq.ft)**
Number of retail units	44 (53 including dwellings in High Street)
Number of Vacant Retail Units	12 (the proposed LDP does not define a Primary Retail Area) 1,009 sq.m representing 20% of the total area

Figure 2: Blaina – Town Centre Boundary showing vacant units as at 25 January 2011 (dark)



Source: Stuart Hogg Property, January 2011

3.3. Vitality and Viability – Key Headlines

The following summary is drawn from existing retail studies[3]that have been undertaken by Blaenau Gwent County Borough Council and observations from site visits during January 2011:

Shoppers Attitudes

No comprehensive household or street surveys have been undertaken recently with shoppers, however the CACI Retail Footprint model identifies that:

- The town centre retains 2% of non food spending within its catchment of 30,053 residents;
- In the core catchment, where 75% of shoppers originate from, Blaina's market share is only 1%;and
- Clothing and footwear represents 15.6% of total annual expenditure in Blaina.

Accessibility

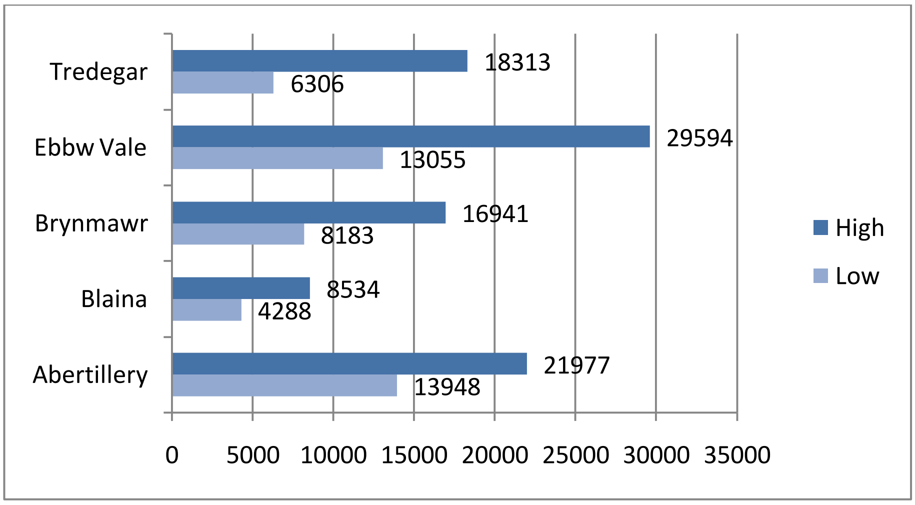
The town centre is easy to get to from the main car park accessed from Station Road and the smaller car park off Church Street and Cross Street. Off street parking is well supplied for the size of town centre with on street parking available along High Street. High Street is easy to walk with a gentle slope down towards the junction with Station Road. For the size of town centre and pedestrian activity observed, the pavement widths provide ample opportunity for pedestrians to cross each side of the main shopping street. A number of bus services run through the town centre to Brynmawr, Cross Keys, Ebbw Vale and Newport.

Footfall

Pedestrian footfall counters show that Blaina has a fairly strong weekly activity for a predominantly local town centre with over 8,500 people visiting the town centre at its busiest time, ebbing to under 4,300 at its quietest. This tends to support its role and function as local town centre, mainly servicing its local population.

Figure 3: Pedestrian Footfall Figures – Blaenau Gwent Town Centres

[3] CACI Town Centre Health Checks, January 2008

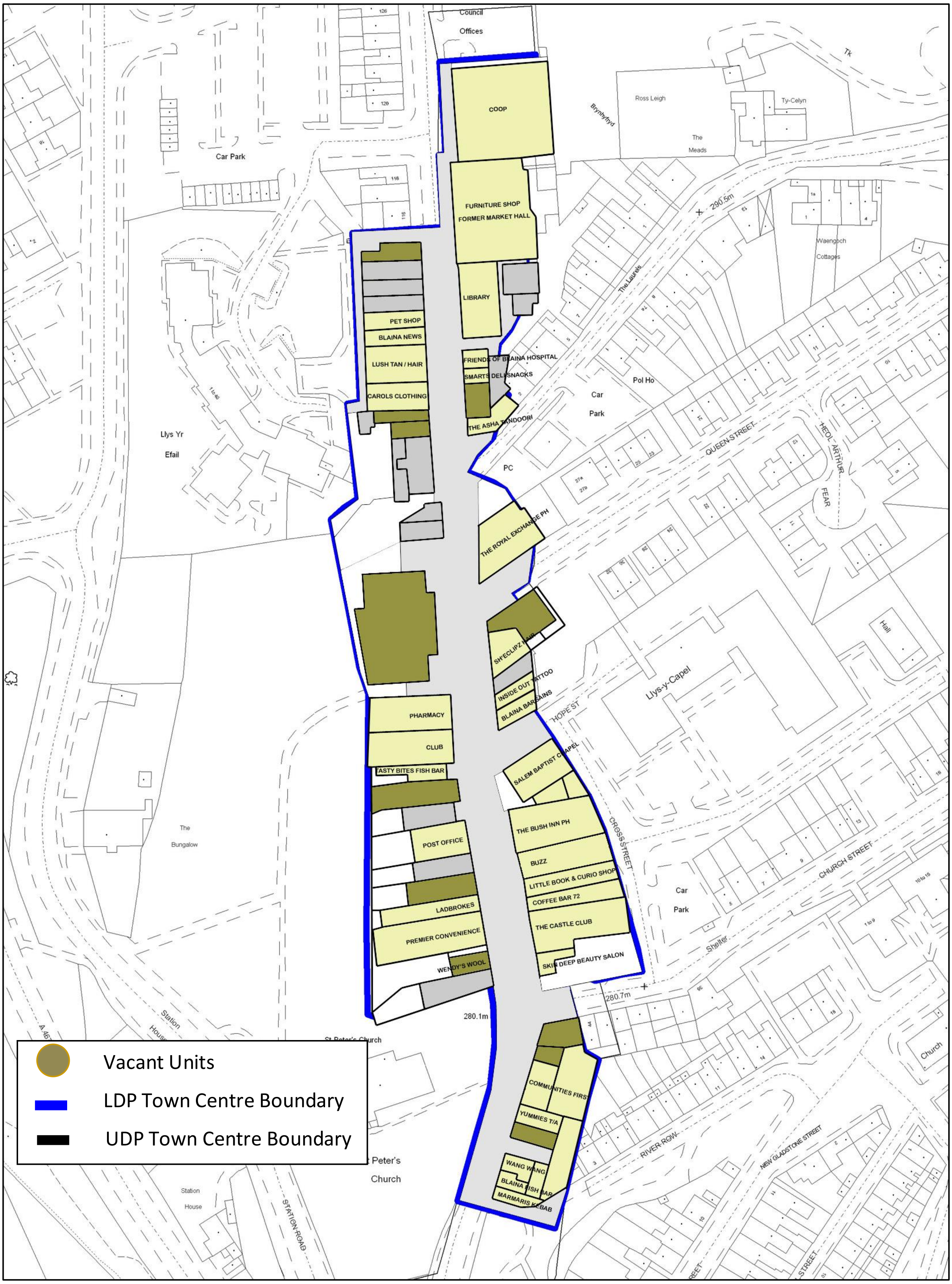


Source: Blaenau Gwent Pedestrian Footfall Counts (April 2009 – March 2010)

4. Town Analysis Maps

The following analysis develops the initial retail statistics in relation to the distribution of vacant units, presence and location of national retailers and where non A1 tends to be situated.

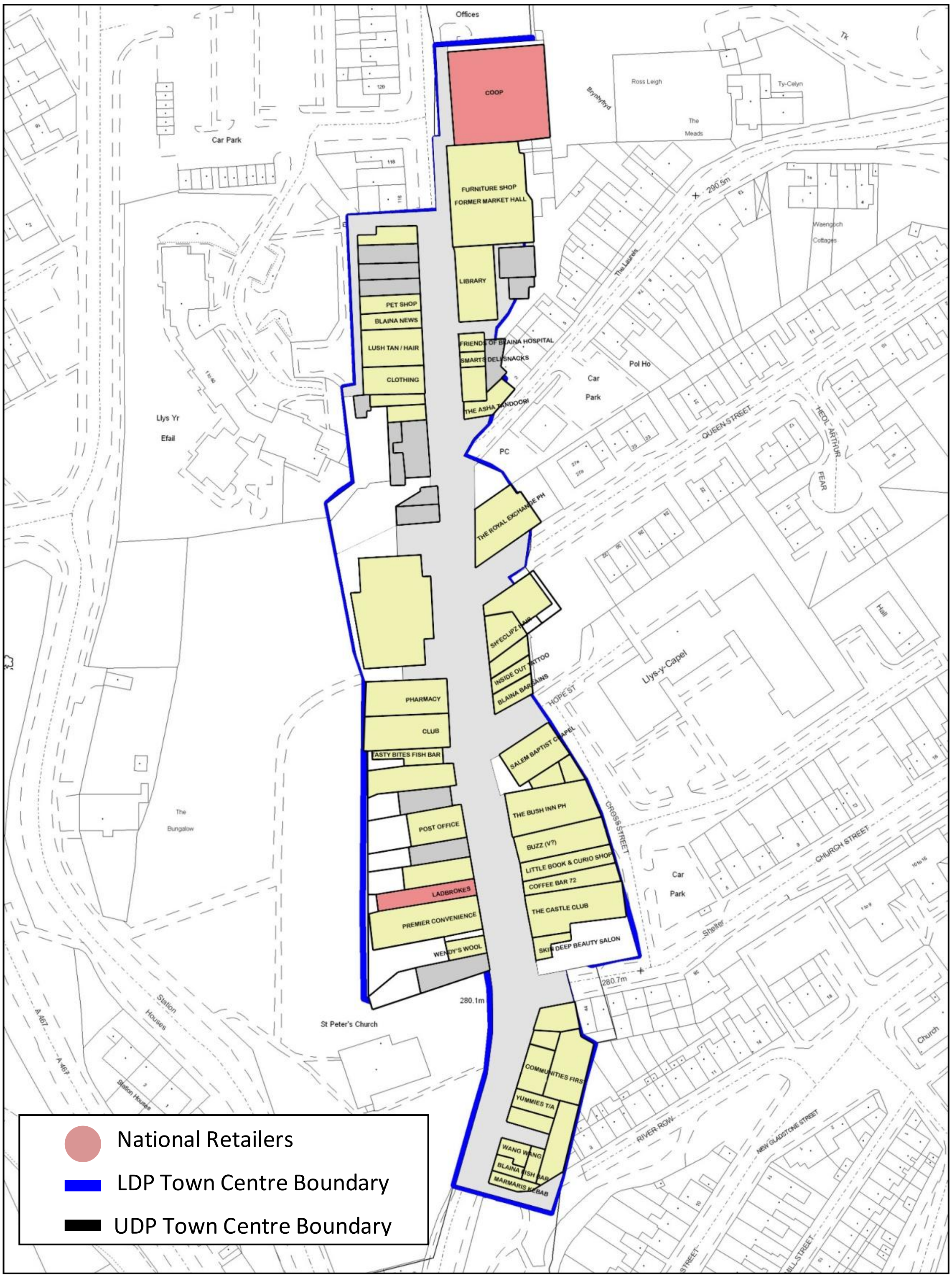
Figure 4: Location of Vacant Units, Blaina



Source: Stuart Hogg Property, January 2011

The Vacant Unit Analysis Map shows a higher than average level of vacant units that can result in a disjointed shopping experience in places. There are large stretches of vacant units or dwellings and no cohesive structure to the high street. On the positive side, there are a high number of opportunities resulting from the level of vacant units for any businesses that do want to start up.

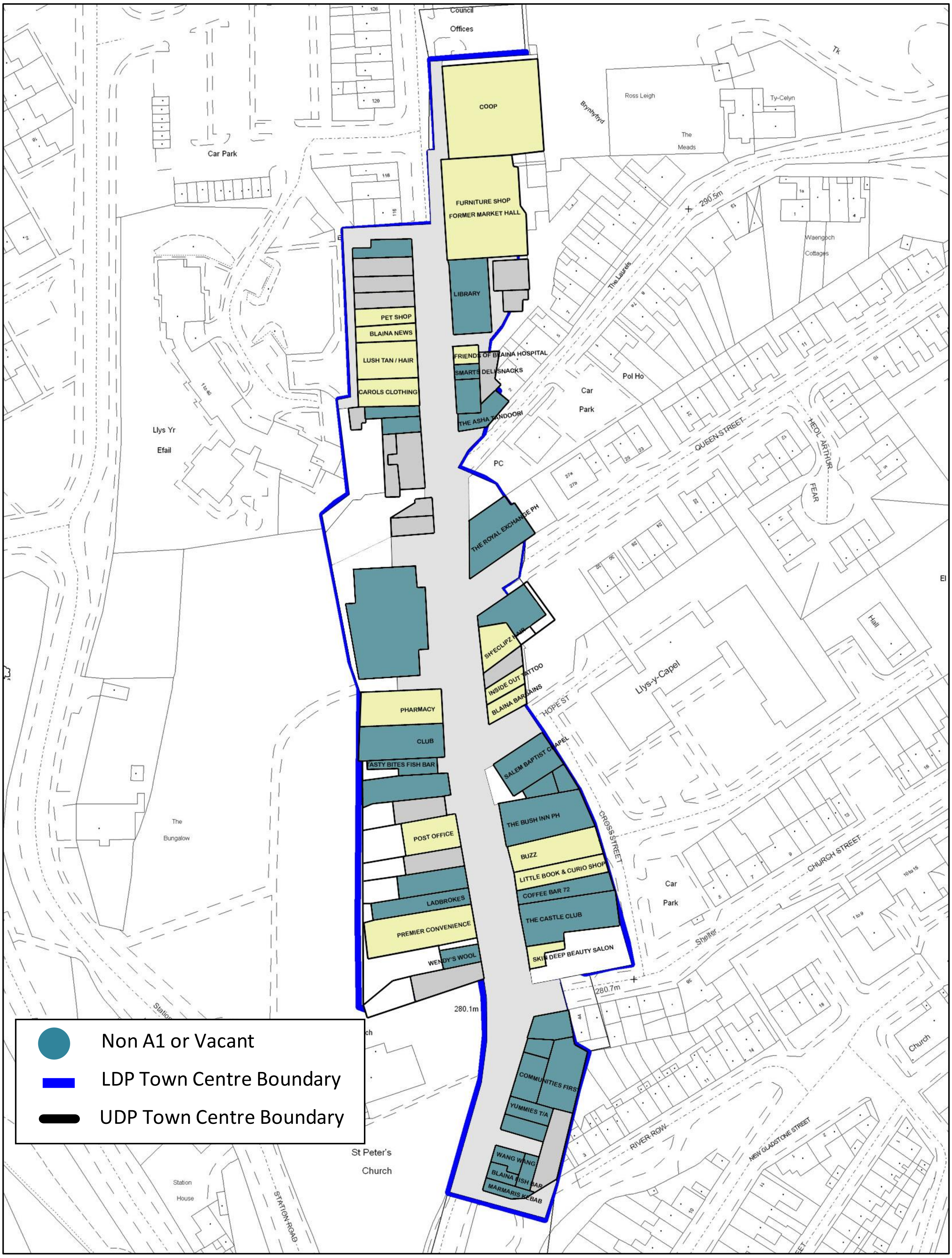
Figure 5: Location of National Retailers, Blaina



Source: Stuart Hogg Property, January 2011

The National Retailer Analysis Map shows an extremely low level of national representation with only a "Co-op" at the northern end of the high street. This is indicative of the local nature and size of this small friendly town. The future may lie in trying to encourage non-national retailers and smaller independent or niche operators, better suited to the size of the town.

Figure 6: Location of Non A1/Vacant Property, Blaina



Source: Stuart Hogg Property, January 2011

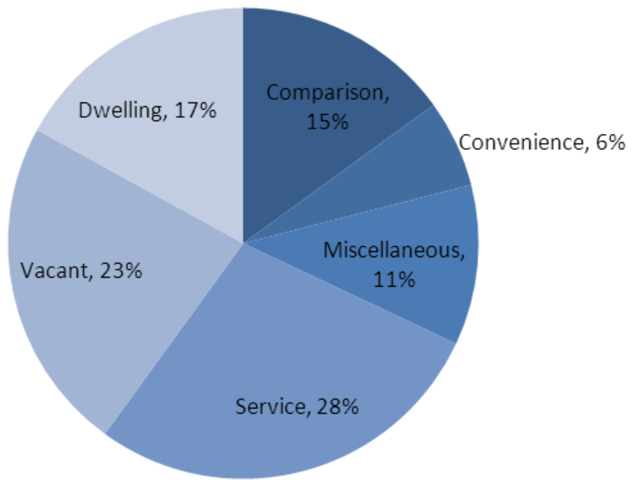
The Non A1 and Vacant Analysis map shows a high proportion of non-A1 uses resulting in a limited daytime shopping experience for visitors, but serves a useful function to residents of Nantyglo and Blaina as its local service centre.

4.1. Category Analysis of Occupiers – Blaina

Table 3: Occupier Analysis – Retail Category - Blaina

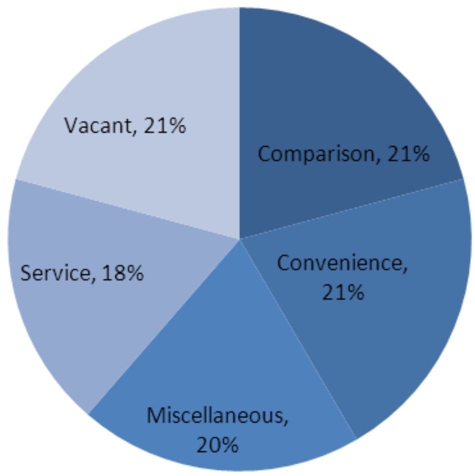
Category	Data	Total
COMPARISON	Count of Occupier	8
	Sum of Total area m2	1,037
CONVENIENCE	Count of Occupier	3
	Sum of Total area m2	1,039
MISCELLANEOUS	Count of Occupier	6
	Sum of Total area m2	990
SERVICE	Count of Occupier	15
	Sum of Total area m2	884
VACANT	Count of Occupier	12
	Sum of Total area m2	1,037
DWELLING	Count of Occupier	9
	Sum of Total area m2	Unknown
Total Count of Occupier		**53**
Total Sum of Total area m2		**4,986**

Figure 7: Number of Units



Source: Stuart Hogg Property, January 2011

Figure 8: Percent of Floor Space



Source: Stuart Hogg Property, January 2011

The following tables show the breakdown of occupiers (as at January 2011) by specific uses (total ground floor area and number of units). Dominant retail sectors are highlighted in the table.

Table 4: Breakdown of Occupiers by Retail Sector - Blaina

Sectors	Sum of Total area m2 Total	Count of Occupier Total
ART / BOOKS / STATIONERY	70.45	1
BETTING OFFICE AMUSEMENTS	70	1
CAFÉ	60	1
CHARITY	25.9	1
CHEMIST / OPTICIAN	186.75	1
CONVENIENCE/TOBACCO/NEWSAGENT	49.42	1
DWELLING		9
FINANCIAL SERVICES(POST OFFICE)	100	1
FOODSTORE	**989.24**	**2**
FURNITURE	523	1
LIBRARY	125	1
OFFICE	**139.6**	**1**
OTHER	200	1
PETS	52.5	1
PUB	**650**	**4**
SALON	**199.11**	**4**
SPORTS	**50**	**1**
TAKEAWAY	**329.8**	**7**
VACANT	1036.98	12
VARIETY	38.2	1
WOMENS CLOTHING	90.5	1
Grand Total	4986.45	53

4.1. Distinctive Clusters

Blaina town centre has no distinctive retail cluster within its linear pattern along high street.

As with most of the Blaenau Gwent town centres there are a number of beauty and hair related services that retain local custom as well as visitors.

There are a number of small independent shops that have the potential to be destination businesses including the book and curio shop. The recent refurbishment work of Salem Chapel, is has the potential to complement the recent private investment in the Royal Exchange Public House.

Figure 9: Distinctive Clusters - Blaina

Source: Miller Research (UK) Ltd

5. Market Commentary

Blaina, whilst serving the local residents of Nantyglo and Blaina is not commonly known as a retail destination to a wider shopping catchment. This has resulted in some units being vacant for a considerable amount of time with property marketing activity generally minimal. As units have become vacant a number appear to have been turned back into dwellings. The Town has also been affected by the competition from neighbouring larger towns.

The recently refurbished Co-op store at the northern end of the High Street appears to be trading very well and is in a good location to serve the immediate locality with parking readily available directly opposite. At the other end of the high street, businesses such as the Post Office and Chemist are also popular with locals due to their service type nature. As a small town there is a higher prospect for more locally based enterprises. The town appears to have a strong community spirit that – with the right support – will help to sustain smaller businesses.

Many of the retail units on High Street are small and suited to independent retailers.

Zone A rents - a measure of value for retail space are currently in the region of £55 per sq.m for prime units, which is significantly lower than all other towns in Blaenau Gwent.

6. Demand

We have not been able to identify any current active requirements for high street units in Blaina. Any requirements are likely to come from within the immediate locality and over a period of time.

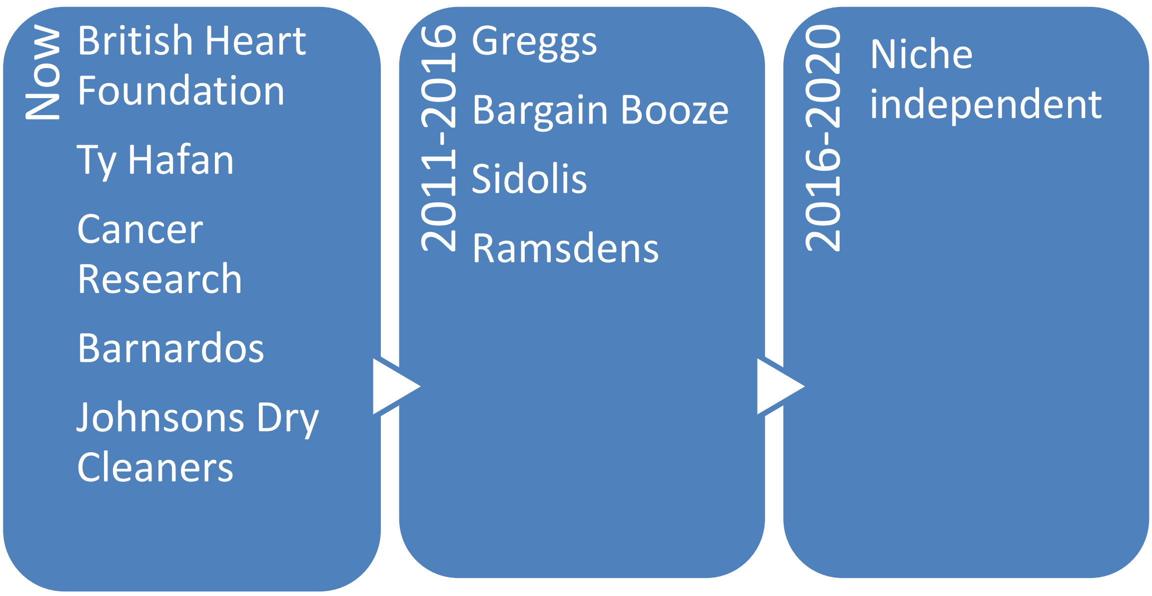
7. Gap Analysis

Types of retailers that are not represented or under-represented in the town that could be targeted and offer opportunities:

- Butcher (no representation)
- Off license (no representation)
- Café / daytime food (only one currently)
- Higher quality charity shops (only one currently - Friends of Blaina Hospital)
- Motor spares
- Florist - (no representation)
- Dental
- Travel agency (no representation)
- Hardware
- Launderette / Dry Cleaning
- Pawnbrokers

Having carried out the gap analysis and retailer consultation, examples of the national retailers that could be targeted over the short / medium / longer term in conjunction with niche independents would be as follows:

Figure 9: Future Timeline for Targeting Occupiers - Ebbw Vale



8. Availability

Properties that are currently being actively marketed are as follows:

- Units 1-4, 54 High Street - this unit is currently used for furniture sales once a week and is available for sale - comprising 10,000 sq.ft of space over two floors and is potentially capable of being sub-divided into three units.
- 94 High Street - a vacant unit with a 3 bedroom flat available at £60,000. Ground floor sales of approximately 400 sq.ft.

There are a number of other retail units that are vacant but do not appear to be actively marketed.

9. Blaina – SWOT Analysis

Table 5: SWOT Analysis, Blaina

Strengths	Weaknesses
Neighbourhood retail potential **Low rents and prices** **Free parking** **Adjacent to park** **Investment in existing church building (Salem Chapel)** **Community Spirit**	Small retail offer Fabric of buildings is poor in specific frontages High proportion of vacant units and non retail Dominance of shutters which creates dead frontages Limited spending power due to small catchment Small units that are not always attractive to prospective national retailers
Opportunities	**Threats**
Open up High Street to civic space opportunities **Develop niche retail / shop local** **Develop heritage potential through restoration works to buildings such as Salem Chapel**	Competition from other towns in Blaenau Gwent Continued vacancy

10. Appraisal of Development Opportunities

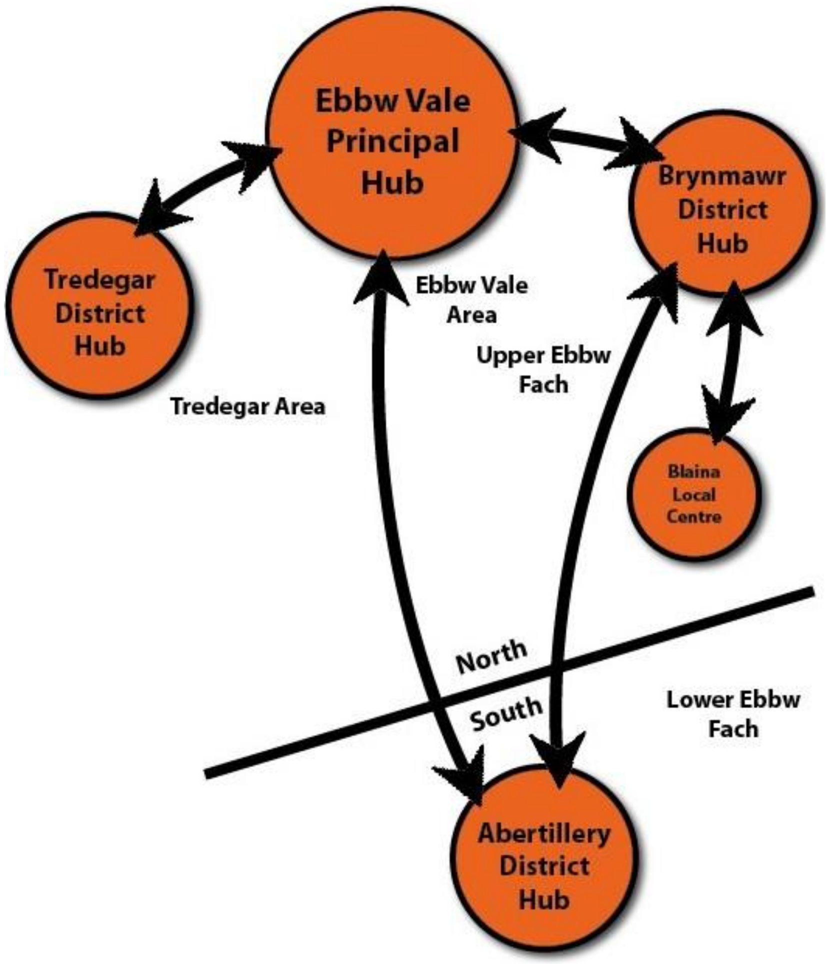
Apart from the vacant club, which we understand has now been acquired by a private individual, there were no development opportunities presented or identified. However, some refurbishment projects were underway, such as Salem Chapel that could stimulate further investment. Significant upgrading is required to some of the facades.

It would be worthwhile engaging with the owners of the club building to see whether it might be possible to create better linkages to the open space to the rear.

11. Role and Function

The Council has sought, through this study, to further develop specific and complimentary retailing roles and functions for each of the five town centres that can be utilised in the development of the town centre branding and associated marketing material.

Figure 10: Proposed Retail Hierarchy – Role and Function –Draft Deposit Local Development Plan 2011



The town of Blaina sits between the two district retail centres of Abertillery and Brynmawr which both have significant food and non food shopping provision and good accessibility for Blaina residents along the A467. These characteristics have contributed to Blaina being a local town centre, primarily serving the residents of Nantyglo and Blaina.

The long linear nature of the High Street close to neighbouring residential areas does not present a cohesive offer to shoppers and does present significant issues for Blaina in terms of its future role and function. A number of vacant units are spread throughout High Street which tends to undermine those retailers and businesses that are endeavouring to provide services for local people. The presence of the Co-operative food store and additional convenience store and post office towards the centre of town supports local food shopping and basic community services. Some further staple retailers such as butchers and bakers would be desirable but difficult to attract due to existing provision in convenience stores or due to them being found in neighbouring towns. A key objective for the town centre is to therefore consolidate and present an attractive local offer that is accessible to local residents.

The scope for developing a visitor-based economy that is assembled around Salem Chapel is a key opportunity. The alignment of the existing café and public houses that builds a critical mass of facilities to support heritage-based tourism and is also important in order to attract day visitors that are participating in passive or active pursuits as well as learning about industrial heritage. Through an events-led visitor strategy, the High Street area and proposed civic space could host community based festivals and events linked to the rich history of the valley. The nearby Cwmcelyn Pond and heritage trails within the valley are destinations for anglers and for visitors learning about the Chartist Movement. Blaina Institute is also home to Blaina Heritage Action Group with displays including sections on the local coal and iron industries, chapels, schools, local celebrities, and a fully furnished reconstruction of a Victorian Welsh Kitchen. They also hold a wealth of information on local history and personal records, from Chartism to rugby.

12. Conclusion – Key Recommendations

Blaina has the opportunity to be reinvigorated as a local town centre and with improvement has the opportunity to retain more local trade and attracts some visitor led activity.

Specific opportunities and issues to address include:

- Promotion of High Street as a local, independent neighbourhood centre;
- Investment in the fabric of buildings;
- More active marketing of the vacant properties;
- Shutters - discourage external shutters so that the key frontages are attractive during the daytime and in the evening and that the town appears to be open for business;
- Consolidate and present an attractive local offer / visitor based economy;
- To build on the local town centre character and heritage based potential into a marketing strategy that retains local expenditure and co-ordinates complementary investment.

A1 – Retailer Feedback

Retailer Consultation - Blaenau Gwent
Feedback

Feb-11

Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	Would you consider units in any of the 5 towns? If so, which and what is the requirement?	If not, why not?					
Wilkinsons	Considering Ebbw Vale - requirement is for a unit of around 10,000 sq.ft	Looked at Tredegar but discounted due to size of town and other towns too small.	Yes	No	No	No	No
Greggs	Are in all towns apart from Blaina	Would not consider Blaina as too small	Yes	Yes	Yes	Yes	No
Timpsons	Going into the Tesco store as a kiosk.	Other towns too small. Looked at Tredegar but felt it was covered by neighbouring towns.	Yes	No	No	No	No
Ladbrokes	Currently in Ebbw Vale, Blaina, Brynmawr and Abertillery but would not consider Tredegar as there was too much competition.	Too much competition - already catered for.	No	No	No	No	No

Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	Would you consider units in any of the 5 towns? If so, which and what is the requirement?	If not, why not?					
Burton / Top Shop	No to all towns.	Market too small in all towns.	No	No	No	No	No
BHS	No to all towns.	Market too small in all towns.	No	No	No	No	No
Coffee No.1	No to all towns.	Demographics not affluent enough.	No	No	No	No	No
Caffe Nero	No to all towns.	Demographics not affluent enough - towns too small and their targets are larger towns and cities.	No	No	No	No	No
Shaws	No to all towns.	Currently in Tredegar but trading poorly. No appetite for expansion in these locations. Felt that town centres were not performing well.	No	No	No	No	No
Costa	Would consider Ebbw Vale - would need a unit of 1,300 sq.ft plus in a prime location in town.	Ebbw Vale is a possibility but other towns not perceived to be attractive enough at the moment.	Yes	No	No	No	No

Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	Would you consider units in any of the 5 towns? If so, which and what is the requirement?	If not, why not?					
New Look	In all towns except Blaina	Too small	In	In	In	In	No
Subway	In Ebbw Vale, but need new franchisee to reopen	Other towns too small and not affluent enough	In	No	No	No	No
Marstons	Yes to Tredegar, Ebbw Vale requiring circa 1 acre of land on main arterial routes	Abertillery & Blaina too small	Yes	Yes	In	No	No
Cash Generators	In Ebbw Vale, and no to all other towns	Catchment population too small to justify another branch in the vicinity	In	No	No	No	No
Superdrug	Awaiting feedback			In		In	
Marks & Spencer	Awaiting feedback						
Card Factory	In Ebbw Vale and Tredegar. Would consider trialling Abertillery for a 6/12 month period to see if sufficient demand	Blaina is too small. Unsure on Brynmawr and proximity to Tredegar/Ebbw Vale	In	In	Unsure	Trial	No

Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	Would you consider units in any of the 5 towns? If so, which and what is the requirement?	If not, why not?					
Lidl	In Tredegar and no to other towns	Other towns have too small a catchment to get board approval at present. This may change in the next 2 years, but is the reason Brynmawr was rejected.	No	In	No	No	No
Aldi	In Ebbw Vale and recently closed Tredegar.	Insufficient population to justify another store in the vicinity.	In	Closed	No	No	No
One Stop	They would consider all towns but each opportunity is considered on its merits and dependent upon competition analysis. Would need a unit of 2,000 to 2,500 sq.ft.	Blaina is unlikely due to existing offering from Co-op and Premier.	Yes	Yes	Yes	Yes	Unlikely
Tesco Express	Awaiting Feedback						
Sainsburys Convenience	Not meet their demographics at present. Looked at Woolworths in Ebbw Vale and turned it down, However demand to take 1000 across the country in next few years so will have to consider less desirable opportunities. Therefore if 3500/4000 sq.ft became available in next couple of years would need to consider.		Future	Future	Future	Future	No

Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	Would you consider units in any of the 5 towns? If so, which and what is the requirement?	If not, why not?					
Edinburgh Woollen Mill	In Festival Park but not a great success. However landlord gave them a good deal to stay last year and new landlord is working hard on the factory outlet scheme to make it a destination.	The socio demographics of the region and core customer penetration are far too low in Blaenau Gwent. They require 30% ccp whilst Ebbw Vale, Tredegar and Abertillery currently only have 1%ccp.	No	No	No	No	No
Store Twenty One	In Ebbw Vale and Brynmawr. Would take Abertillery and Tredegar. Want between 3000 and 5000sqft ground floor sales and 1500sqft back up. In prime position but difficulty finding size.		In	In	Yes	Yes	No
Sports Direct	In Festival Park and also Merthyr. No other requirements	Not sufficient population to sustain another store in the region. Would not want to relocate from Festival park to town centre as trades satisfactorily at present time	No (in Festival Park)	No	No	No	No
Bargain Booze	In Tredegar and Rassau. They are led by the franchisee coming to them and wanting to become a Bargain Booze store. Cannot be any closer than 1.5 miles from another store	Ebbw Vale too close to Rassau store so franchisee is protected	No	In	Yes	Yes	Yes

BRYNMAWR - OCCUPIER REPORT

MILLER

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31/03/2011

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3. Brynmawr Town Centre

3.1. Strategic Context

Brynmawr is situated in the north east of Blaenau Gwent in a strong strategic position in terms of transport with the A465 Heads of the Valleys wrapping itself around the northern edge of the town. The A467 from the south feeds the lower Ebbw Fach communities with the A4047 and B4248 providing good local links with Beaufort and Ebbw Vale, and Blaenavon respectively. It is a key district centre having a total floorspace in the town centre study area of 126,283 sq ft[1].

The town has a population of 5,599[2] with its primary retail catchment of Blaina, Brynmawr and Nantyglo having a combined resident population of 14,772[3].

The town centre's key focal point is its Market Square with the refurbished cinema and library providing important community facilities. The building has been recently refurbished and houses the only cinema in Blaenau Gwent. To the rear of the cinema and library is the local museum which houses local artefacts and adds to the cluster of community facilities within this part of the town centre.

Off Market Square the main shopping street is Beaufort Street which rises up through the town to meet King Street and the A4047. Worcester Street, Davies Street and Bailey Street are adjacent to Beaufort Street with some smaller service sector businesses located just off these areas. The town centre is framed at its southern edge by the Blaina/Blaenavon Road roundabout with Station Road accommodating a florist, takeaways and a club. The bus station is located in Catholic Road which is to the rear of the locally known "Haven" building off Market Square.

Figure 1: Main Shopping Area

Source: Stuart Hogg Property

To the south of the town centre and on the A467 Blaina Road is the edge of centre Lakeside Retail Park, which comprises of a large Asda supermarket and a number of other retailers specialising in clothing, home-ware, motor accessories/bikes, pet supplies and Marstons pub.

The public toilets are also located on Market Square, and every Saturday the weekly market takes place. Off street car parking is provided to the rear of the Market Square and off Worcester Street, King Street and Somerset Street with on street parking along the main shopping streets.

[1] Stuart Hogg Property /VOA Data
[2] 2001 Census
[3] 2001 Census

3.2. Headline Statistics

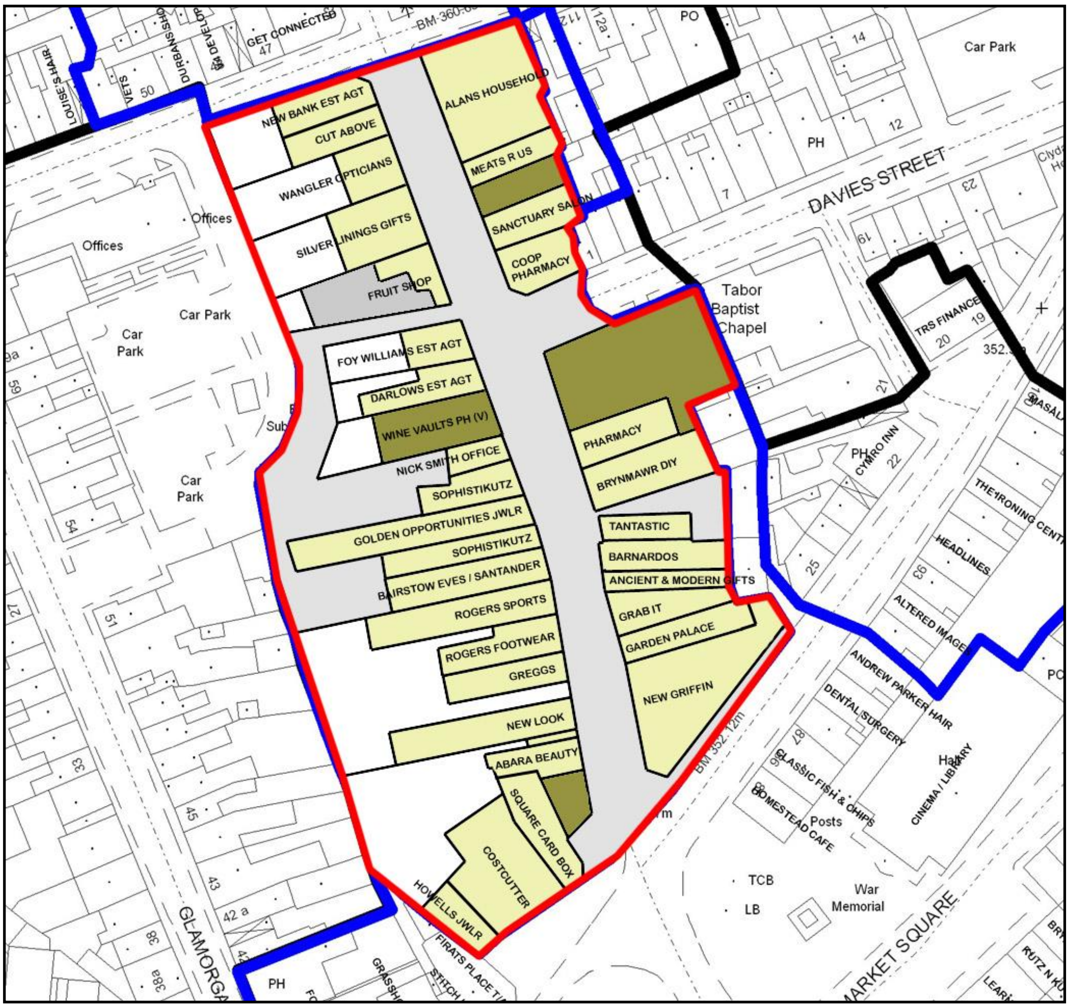
The following table presents the key retail statistics for Brynmawr with

Figure 2 below showing the draft deposit Local Development Plan retail primary area and the location of vacant buildings as of 25th January 2011.

Table 1: Brynmawr - Retail Statistics

Total floor area of town centre retail space	**11,732 sq.m (126,283 sq.ft)**
Number of retail units	**95**
33 units in Primary Retail Area	(4,525 sq.m)
62 units outside of Primary Retail Area	(7,207 sq.m)
Number of Vacant Units	12 (9 outside Primary Retail Area, 3 in Primary Retail Area) with a total of 2,594 sq.m which equates to **22%** of the total space

Figure 2: Brynmawr – Primary Retail Area showing vacant units as at 25 January 2011 (dark)



Source: Stuart Hogg Property – January 2011

3.3. Vitality and Viability – Key Headlines

The following summary is drawn from existing retail studies[4] that have been provided by Blaenau Gwent County Borough Council and observations from site visits during January 2011:

Shoppers' Attitudes

- CACI data compares Brynmawr to centres such as Blackwood and Monmouth in its rural centres classification;
- Brynmawr captures 3% of its total annual retail expenditure from its 104,322 residents within its retail catchment;
- In its core catchment, Brynmawr retains 8% of its market share with it increasing to 11% as it turns to its primary catchment;
- Clothing and footwear account for 15.7% of the total expenditure, with durables accounting for 12.7% per year;
- 53.2% of respondents to a household telephone survey indicate they conduct their main food shop at the Asda store in Lakeside, with 11.6% of respondents shopping at the Morrisons store in Ebbw Vale;
- When asked about top up food or convenience shopping, 73.6% undertake this in the Asda store in Brynmawr, with 50.6% naming other convenience stores in Brynmawr;
- In terms of locations to purchase non-food items, Cardiff (20%) was the most popular location for non-food items. Abergavenny (17.6%) was the second most popular and Brynmawr Town Centre (9.6%) being the third most popular town.
- 71.2% of all respondents surveyed visit Brynmawr for their shopping. 58.4% of the 178 respondents who visited Brynmawr stated that the main reason was due to the closeness and or convenience to their home;
- 27.6% of shoppers when asked what would make them visit the area more frequently identified a better choice/range of non-food shops;
- Due to the close proximity of residential areas to the town centre, 44.3% access it on foot with 27.9% travelling by car/van; and
- When asked what would improve people's visit to Brynmawr, 77.6% and 60.7% identified a better choice/range of non-food and food shops, respectively.

Accessibility

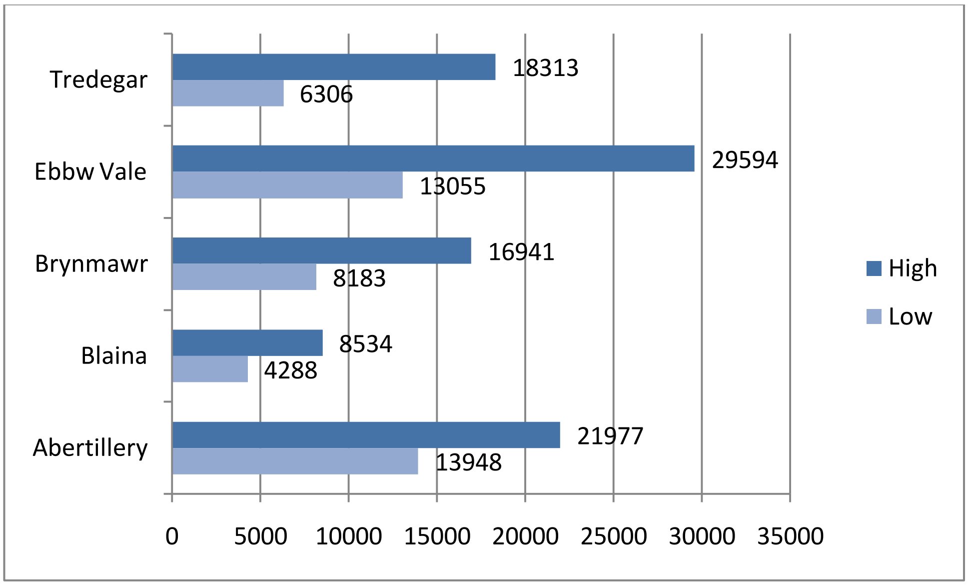
The town's main shopping area, Beaufort Street, is located on a gradual incline with off street car parking situated half way up the hill in Worcester Street and off King Street. There is reasonable on street parking provision for those that are less mobile. The car park to the rear of the Market Hall helps to service the Cinema and Library and the other end of the town centre. A number of bus operators run services to and from the town centre, connecting to Abergavenny, Abertillery, Ebbw Vale, Llanelly Hill, Newport and Tredegar.

[4] CACI Town Centre Health Checks, January 2008

Footfall

Footfall figures show that Brynmawr tends to compete well with other district centres such as Tredegar with similar weekly activity. Observations from site visits, witnessed shoppers tending to gravitate to the main Beaufort Street undertaking specific trips to a range of destination shops and businesses.

Figure 3: Pedestrian Footfall – Blaenau Gwent Town Centres

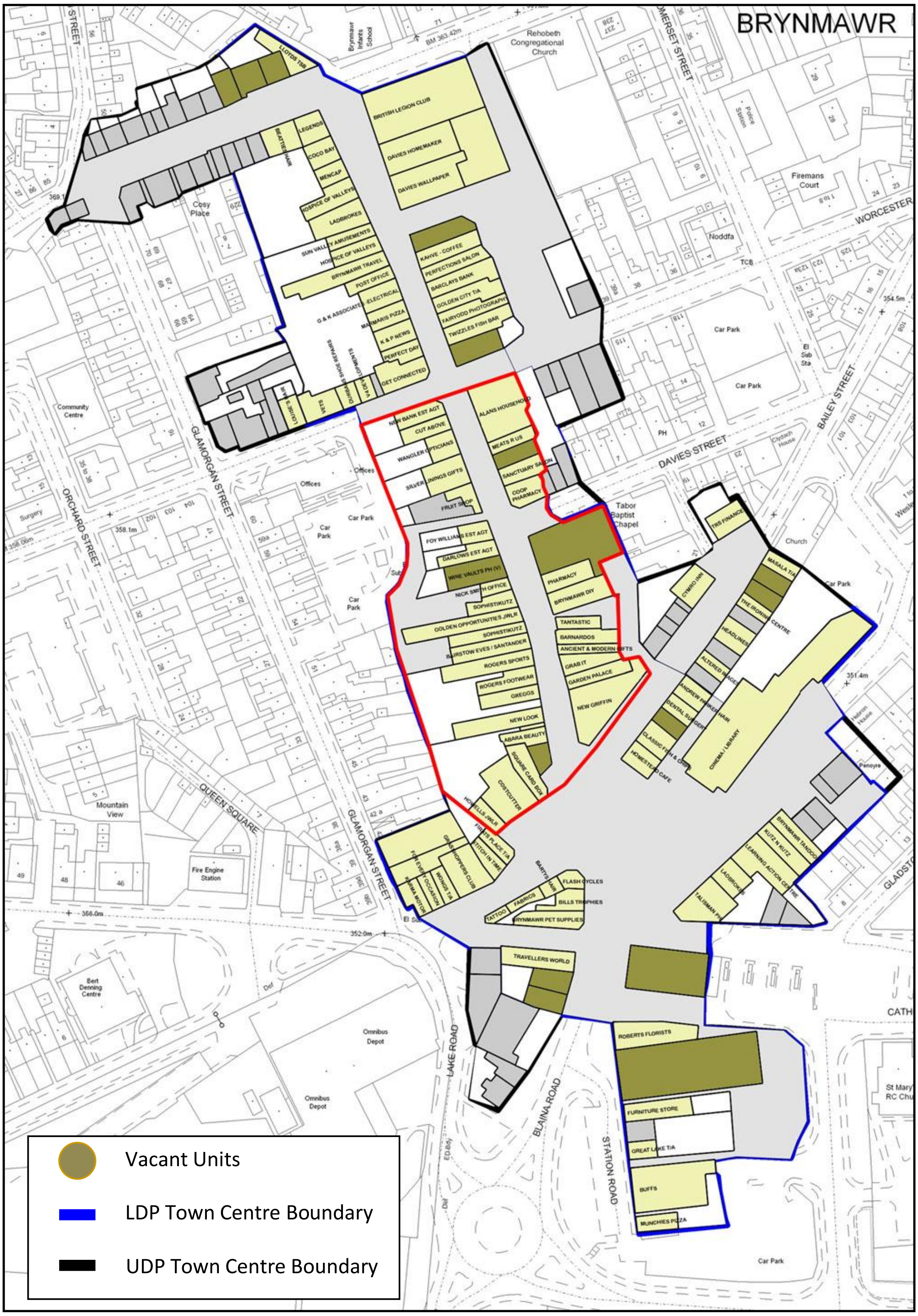


Source: Blaenau Gwent Pedestrian Footfall Counts (April 2009 – March 2010)

4. Town Analysis Maps

The following analysis develops the initial retail statistics in relation to the distribution of vacant units, presence and location of national retailers and where non A1 tends to be situated.

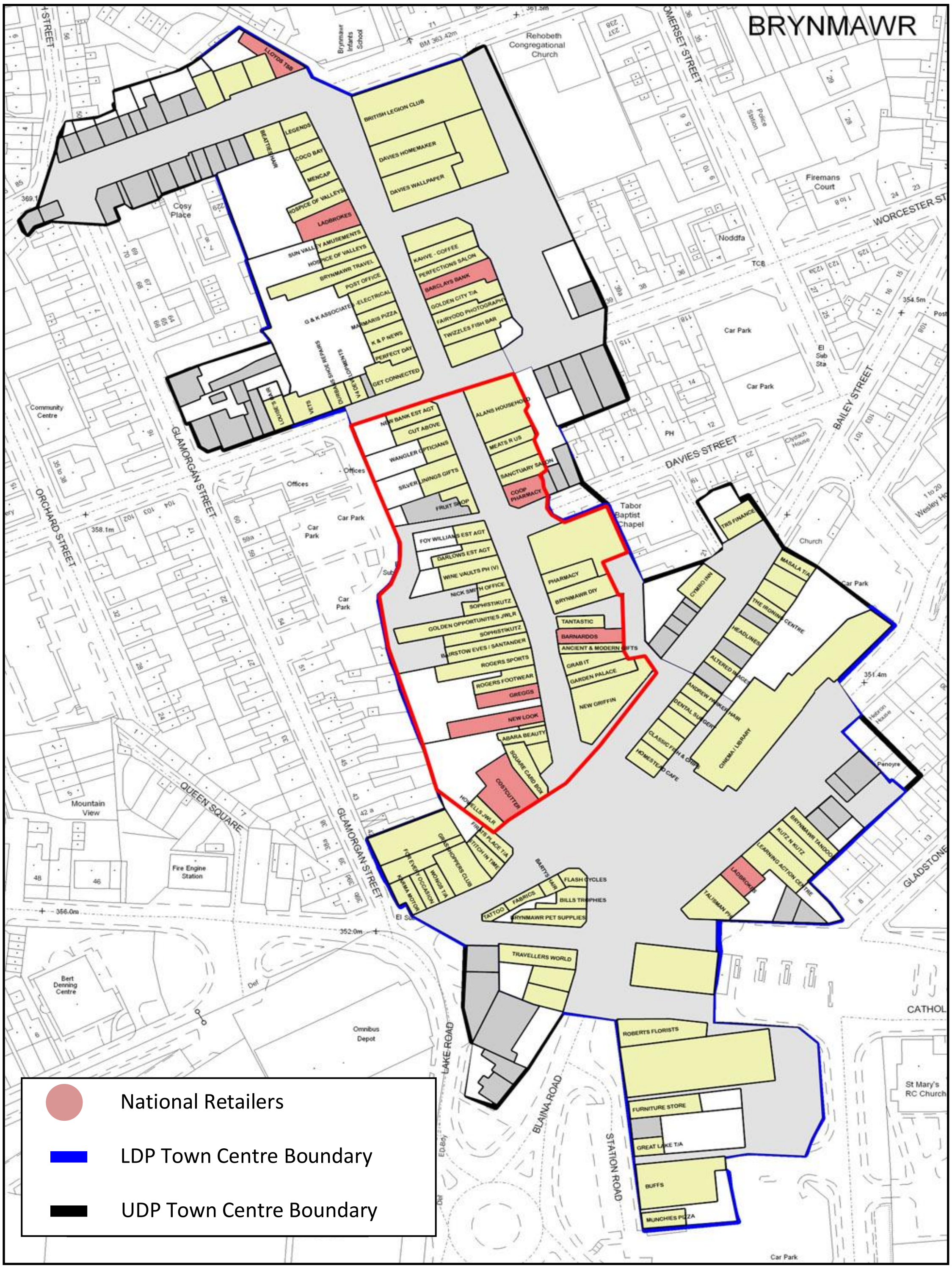
Figure 4: Location of Vacant Units, Brynmawr



Source: Stuart Hogg Property, January 2011

The Vacant Unit Analysis Map shows a *reasonable* level of occupancy (11.1% vacant) in the Primary retail area apart from the two large properties that are currently available for lease/sale (former Somerfield at the Wine Vaults public house). There are lower levels of occupancy to the southern section outside the primary retail area with, in particular, two large vacant units currently offering opportunities for investors and new businesses.

Figure 5: Location of National Retailers, Brynmawr

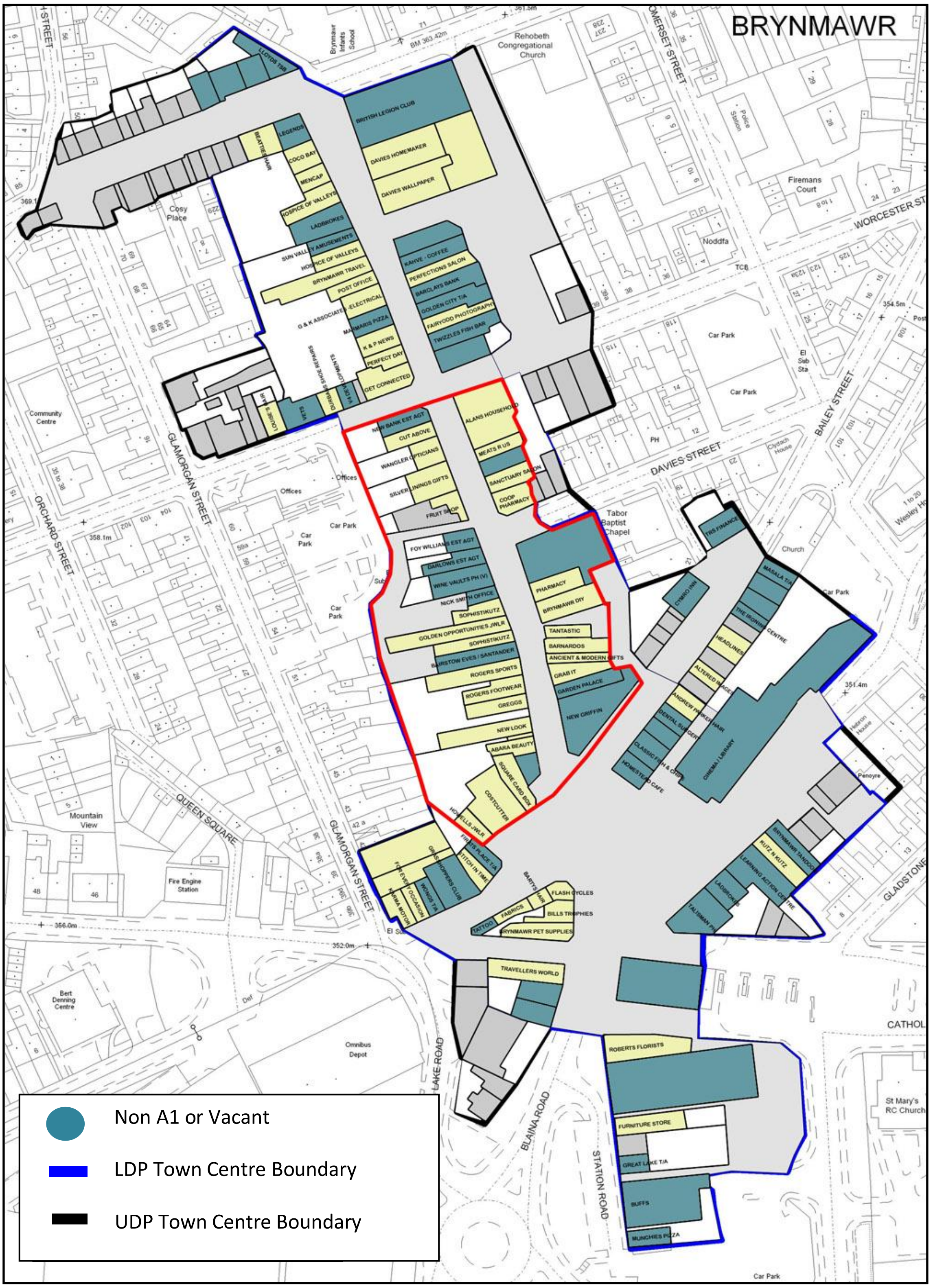


Source: Stuart Hogg Property, January 2011

The National Retailer Analysis Map shows quite a low level of national retailers. The development of the Asda and the Lakeside Retail Park has had an impact on attracting national retailers to the town centre.

However all of the retail units at Lakeside are now occupied, and there are opportunities for retailers to take up available properties within the town centre where many owners are offering incentives for occupation of units.

Figure 6: Location of Non A1/Vacant Property, Brynmawr



Source: Stuart Hogg Property, January 2011

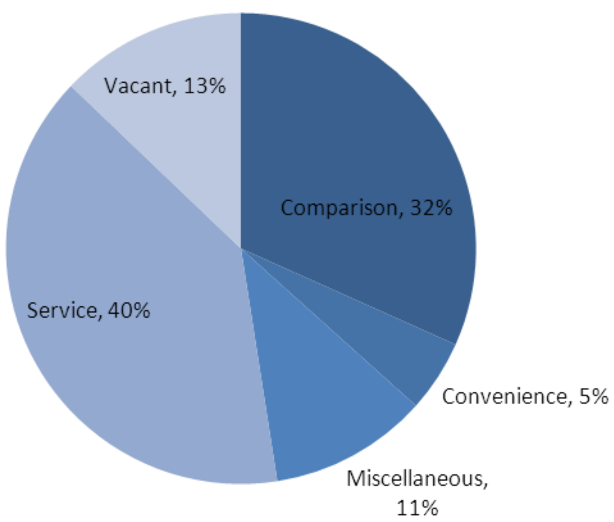
The Non A1 and Vacant Analysis map shows a reasonable mix along Beaufort Street with several key independent retailers. The southern section of the retail area has a lower level of A1 retail and is a more secondary pitch where typically non A1 retailers tend to be located. The exception to this is the small standalone parade of units on Bailey Street comprising, Flash Cycles, Bills Trophies and Brynmawr Pet Supplies, which provides a good retail offering, particularly facing the Square itself.

4.1. Category Analysis of Occupiers – Brynmawr

Table 2: Occupier Analysis – Retail Category - Brynmawr

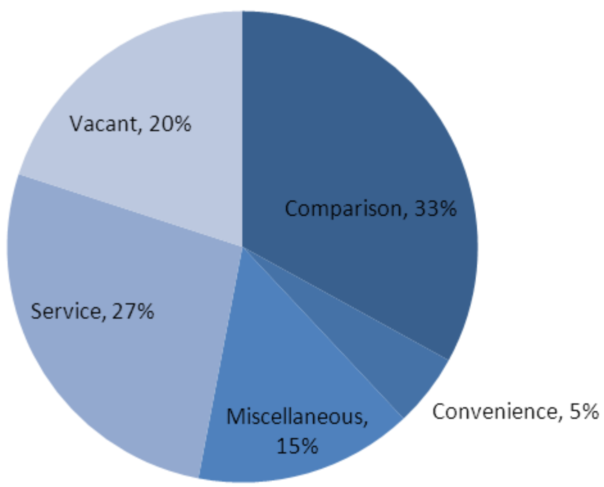
Category	Data	Total
COMPARISON	Count of Occupier	32
	Sum of Total area m2	4,300
CONVENIENCE	Count of Occupier	5
	Sum of Total area m2	642
MISCELLANEOUS	Count of Occupier	11
	Sum of Total area m2	1921
SERVICE	Count of Occupier	40
	Sum of Total area m2	3,475
VACANT	Count of Occupier	13
	Sum of Total area m2	2,594
Total Count of Occupier		101
Total Sum of Total area m2		12,932

Figure 7: Number of Units



Source: Stuart Hogg Property, January 2011

Figure 8: Percent of Floor Space



Source: Stuart Hogg Property, January 2011

The following tables show the breakdown of occupiers (as at January 2011) by specific uses (total ground floor area and number of units). Dominant retail sectors are highlighted in the table.

Table 3: Breakdown of Occupiers by Retail Sector, Brynmawr

Sectors	Sum of Total area m2 Total	Count of Occupier Total
ART / BOOKS / STATIONERY	88.6	2
ARTS / THEATRE	300	1
BAKER	161.92	1
BETTING OFFICE AMUSEMENTS	340	3
BRIDAL	53	1
BUTCHER	56.74	1
CAFÉ	220.93	2
CARS	39.18	1
CHARITY	**269.16**	**4**
CHEMIST / OPTICIAN	500.65	3
CTN	59.6	1
DENTAL	71.98	1
ELECTRICAL	87.13	2
ESTATE AGENT	**439.88**	**4**
FINANCIAL SERVICES	**629.36**	**4**
FLORIST	274.4	1
FOODSTORE	311	1
FOOTWEAR	200	1
FURNITURE	**1328.75**	**3**
GIFTS	**259.29**	**4**
GREENGROCER	52.5	1
HARDWARE	383.47	2
JEWELLER	140.85	2

LIBRARY	200	1
MUSEUM	250	1
OFFICE	220.92	3
PETS	169.64	2
PUB	1150	6
SALON	**787.56**	**13**
SPORTS	234.22	2
TAKEAWAY	510.34	9
TEXTILES	32	1
TRAVEL	194.48	2
VACANT	2593.94	13
VARIETY	85.46	1
WOMENS CLOTHING	235.31	1
Grand Total	12932.26	101

4.2. Distinctive Clusters

The town centre has a strong independent retail feel with some multiple/nationals located within the main shopping area.

Figure 9 shows the dominance of specific retail sectors in Brynmawr with hair and beauty well provided for within Brynmawr, with thirteen related businesses across the town centre. Whilst not numerous in number there are some key destination retailers in the town centre that attract shoppers for their quality of service and distinct goods. This adds to the strong sense of community with some retailers recognised as being destination or anchor businesses for the town centre. These include Davies Homemaker, Alan's Furnishings, Brynmawr DIY, Rogers Footwear, amongst others.

Whilst not clustered or set within a specific street or area, other specialist shops include Flash Cycles, Altered Images-dress maker, First Base Men's Clothing, Robert's Florist with fresh meat and produce provided by Meats R Us and the Fruit Shop. A number of cafes operate in the town such as Kahve Cafe selling hot drinks and wholesome lunchtime snacks.

Figure 9 does show the dominance of Takeaways within the town centre as well as charity shops with more operating than any other town. Unfortunately, their offering is not as high as some charity shops, and does tend to reduce the appeal of the town centre in specific areas.

A marketing campaign that relates to the personality and sense of personal service and business community needs to be addressed with a need to market some key destination retailers and other complementary businesses.

Figure 9: Distinctive Clusters, Brynmawr

Source: Miller Research (UK) Ltd

5. Market Commentary

Brynmawr has seen a significant amount of new development over the last 5 years with the Asda and Lakeside Retail Park development just outside the town centre. These have been successful developments in the sense of attracting major names but have tended to have encouraged footfall out of the town centre and made it difficult to attract national retailers into the traditional town centre. All units are currently occupied.

Due to its strong location, the town pulls trade from the smaller settlements to the south (towards Abertillery and also from Blaenavon). The town competes with other larger towns along the Heads of the Valleys Road and in particular its nearby neighbour Ebbw Vale and also Merthyr Tydfil and Abergavenny.

The town has seen a number of closures of larger units (Kwiksave, Somerfield) and these units have remained vacant for a considerable period, which reflects poorly on the town's attractiveness to retailers. We are aware that the former Kwiksave has been the subject of potential interest for redevelopment as part of a larger site.

Many of the units on the traditional high street are small and unsuitable for most national retail requirements although there is an opportunity to create a larger footprint store in the former Somerfield.

Beaufort Street is the primary retail area and although there are a number of high quality retail units to the north, the street is strongest at its southern end and appears to be stronger on its western side in terms of its A1 retail use and more established retailers (Rogers, Greggs, New Look, Get Connected).

There is a high proportion of beauty and hairdressing salons (13 or 13.7% of units) and takeaways (9, or 9.5% of units) in the town and a limited range of convenience.

Zone A rents - a measure of value for retail space are currently in the region of £115 per sq.m for prime units.

No active information on new lettings was available.

6. Demand

We have not been able to identify any current active requirements for high street units in Brynmawr, however, any marketing strategy could potentially attract requirements that are more regionally based and provide the focus on improving the town centre continues it is reasonable to assume that additional interest could be generated in the medium to longer term.

There have, of course, been lettings over the last 5 years on Lakeside Retail Park to high profile retailers - Peacocks, Store Twenty One, Halfords, Home Bargains, Farm Foods and Pets at Home and the Lakeside Retail Park is now fully let, potentially creating overspill demand from retailers for large units in the town centre.

There would be the potential for further retail units to locate close to the town centre with the NMC/Bus Depot site being well positioned for a mixed use devlopment scheme. Occupiers such as Pizza Hut, McDonalds, KFC, Subway for example, may be willing to take units in this location. Unfortunately, most of the requirements from retailers to be located on the edge of a retail park are not transferable to high street locations where it is difficult or impossible to offer, for example, a drive through service and also the high levels of parking. Nevertheless, given the restrictions on further growth of the Retail Park, the potential for the town centre to accommodate any other requirements for the town should be promoted.

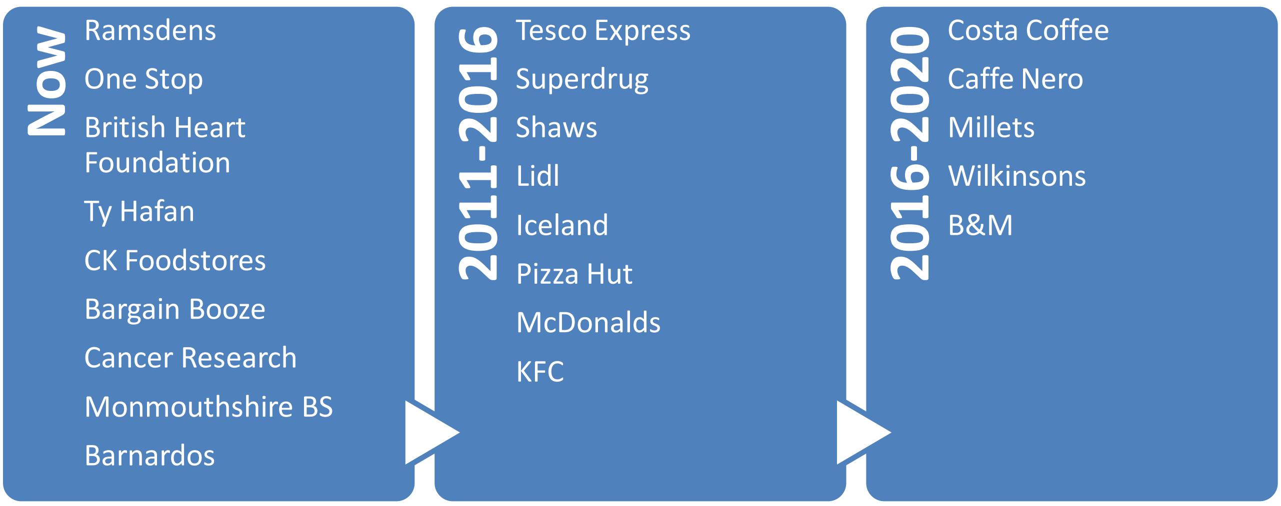
7. Gap Analysis

Retailers / types of retailers that are not represented or under-represented in the town that could be targeted and offer opportunities:

- Butcher (only one currently)
- Confectionary / tobacco / news (only one currently)
- Food convenience
- Off licence (no representation)
- Toys
- Clothing (only one women's clothes shop although well catered for at Lakeside)
- Babywear
- Optician (only one currently)
- Florist (only one currently)
- Book Shop
- Camping / outdoor
- Cafe
- National charity shops with higher quality offer

Having carried out the gap analysis and retailer consultation, examples of the retailers that could be targeted over the short / medium / longer term would be as follows:

Figure 10: Future Timeline for Targeting Occupiers, Brynmawr



The feedback from our enquiries of national retailers and experience in the market is that there is a tendency for the more up market brands to want to be located in the Lakeside Retail Park if they are going to come to Brynmawr, but these are fully occupied.

8. Availability

Properties that are currently being actively marketed are as follows:

- 42/43 Beaufort Street - this vacant unit (formerly Somerfield) comprises a ground floor sales of 3,587 sq.ft and a first floor ancillary of 4,310 sq.ft - the quoting rent is £29,000 per annum and the Rateable Value of £17,000 (£6,953 payable 2010/11). The head lease to Somerfield expires on 29 September 2013. The owners are offering incentives for occupiers.
- Former Kwiksave, 2 Station Road - this vacant unit comprises a ground floor sales area of 7,538 sq.ft and is available for sale or to let. Terms on application. The owners are offering incentives for occupiers.
- 2 Beaufort Street - available at a quoting rent of £3,300 per annum but no further information available.
- The Wine Vaults - vacant public house available at a quoting price of £79,950 - no further information available.

There are a number of other retail units that are available but do not appear to be actively marketed.

9. Brynmawr – SWOT Analysis

Table 4: SWOT Analysis, Brynmawr

Strengths	Weaknesses
Traditional market town potential High no of independent retailers Attractive civic space on Market Square Diversity of tenants Low rents Free parking	Large vacant units both in the primary and outside the primary retail areas Edge of centre shopping that does not connect with town centre Shutters creating dead frontages Limited spending power Small units not suitable for many nationals
Opportunities	**Threats**
Strategic location Create connection with Lakeside Retail Park through NMC Factory/Bus Depot site Develop shopping experience Market town potential in terms of its setting and image Shaker furniture heritage and marketing links with household and furniture stores Potential for interesting street scene Build on local customer base	Increase in competition from Lakeside Retail Park Competition from neighbouring centres Inability to connect Lakeside with town centre

10. Appraisal of Development Opportunities

Bus Depot and NMC Factory - This is potentially a major, mixed use redevelopment opportunity that could link the town centre with the Lakeside Retail Park and combine a mix of community facilities / residential and commercial space. We see this as being an important project to progress as the effect of no action will result in the Lakeside Retail Park growing in popularity, and the likely decline of trade in the town centre.

Former Welsh School - this is another important opportunity at the northern end of Beaufort Street and there is opportunity to provide additional car parking at its southern end that could draw footfall up Beaufort Street. The remainder of the site is, in our view, a residential opportunity and there is currently no appetite for further private commercial development in this location.

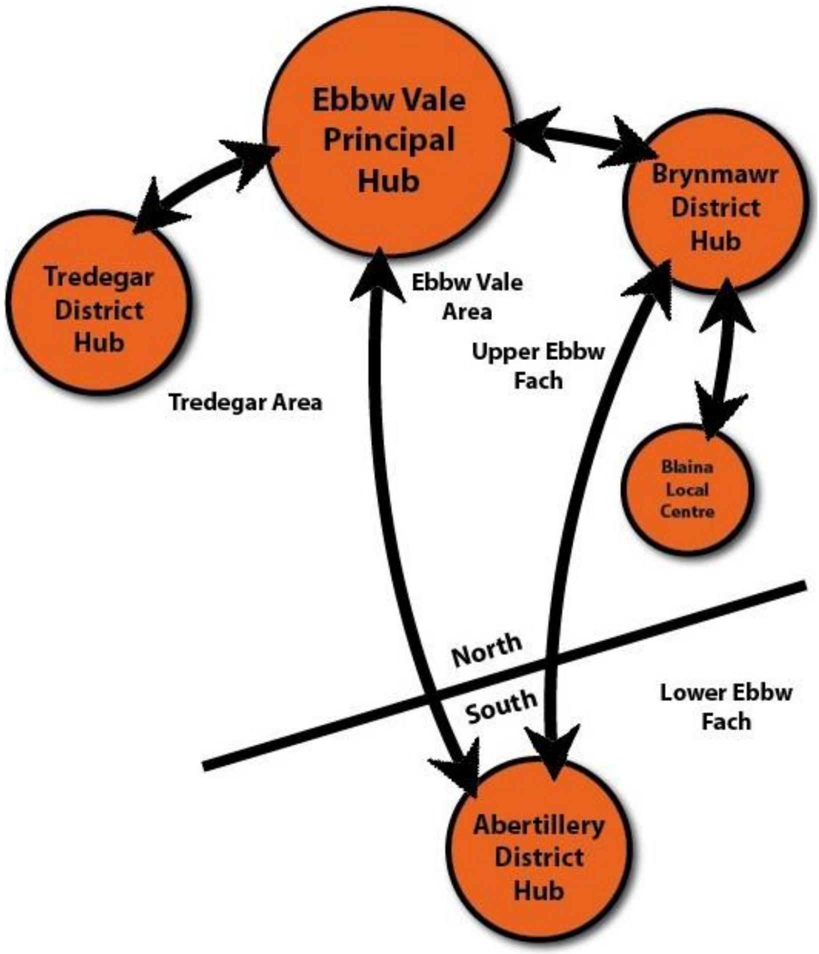
Former Kwiksave, Station Road - this is the subject of potential interest from national food discount retailers but may also require land in the ownership of the Council. Occupation of this unit could enhance this area and would certainly be preferable to a large vacant unit.

Vacant Furniture Showroom, Market Square - we understand the Council are considering acquisition of this site to enhance the bus station and provide additional public amenity space. Given the relative success of the development opposite, it may also be worth exploring the potential for retail units and restoring a more appropriate street scene and building line.

11. Role and Function

The Council has sought through this study to further develop the complementary retailing roles and functions for each of the five town centres that can be utilised in the development of the town centre branding and associated marketing material.

Figure 11: Proposed Retail Hierarchy – Role and Function –Deposit Local Development Plan 2011



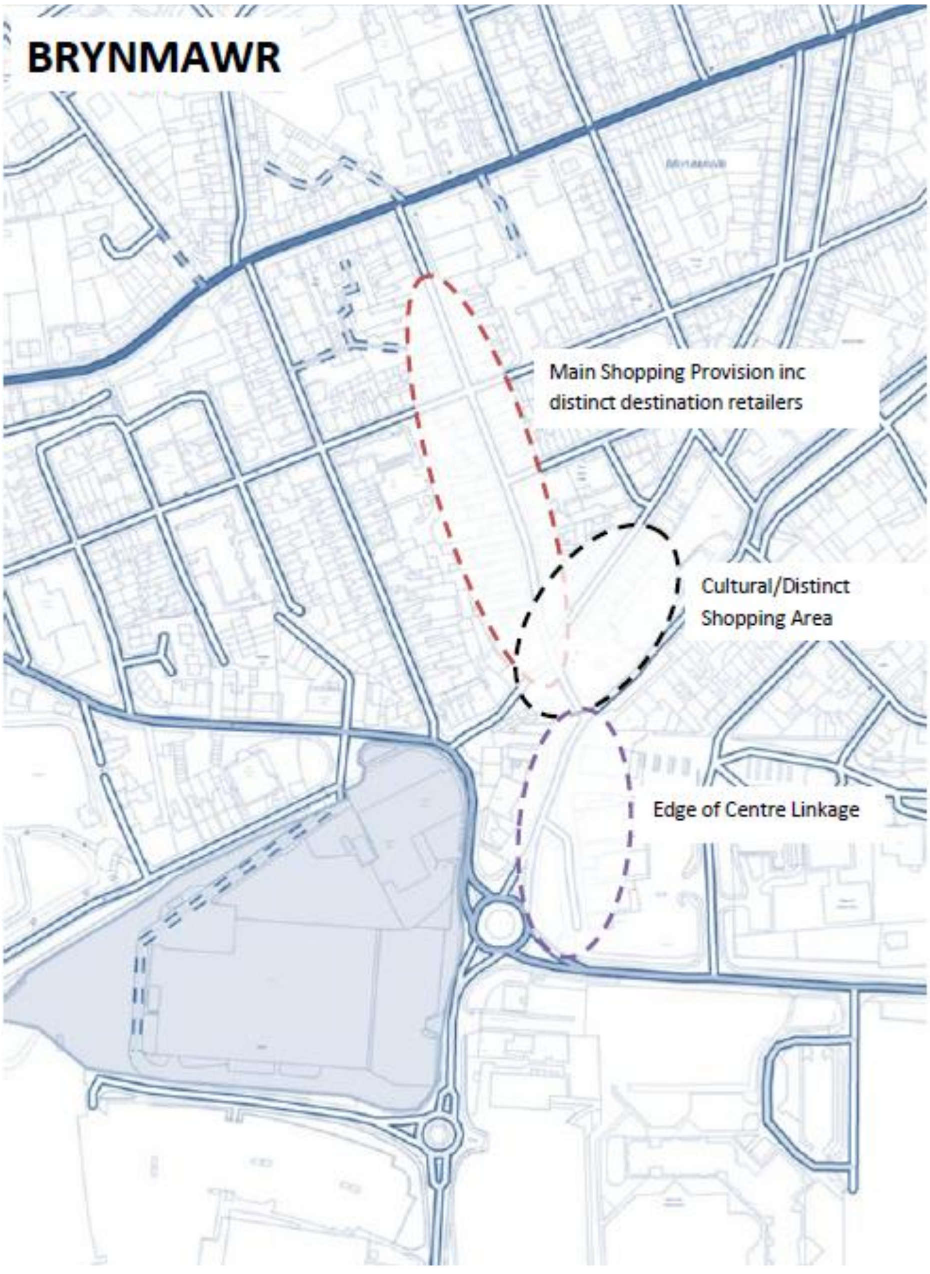
The location of Brynmawr in the north eastern corner of the County Borough, does by geography create a district that serves it local community in terms of shops and services. Its strategic position on an inner gateway into the Heads of the Valleys area does pose challenges and threats as well as opportunities. Its proximity to the A465 and A467 does give shoppers choice and increased mobility to other competing retail centres within and outside Blaenau Gwent.

Its elevated gateway position does provide opportunities for association with the wider destination that is Blaenau Gwent from the southern eastern approach, with links into Blaenavon and the World Heritage site and industrial heritage within the town and the Ebbw Fach valley including Nantyglo Roundhouses and the Chartist Movement. There is also opportunity for having an association with outdoor activities sat on the edge of the Brecon Beacons National Park.

To underpin its district centre role it needs to build on its local, community character to the town which feels close-knit and personal. To add to this experience the town centre needs to project itself as being convenient with a "basket type" food supermarket key to animating the centre of the primary retail area linked to other household retailers and services. The need to improve and extend the range and choice of comparison retailers is required with some missing or under represented retailers to be targeted. These include toys, clothing, babywear, books, camping/outdoor with potential for additional representation in butchery, confectionary/tobacco and news, opticians, florists to add to the diversity of the place.

Whilst not clustered or grouped within a specific area of the town centre there are a number of destination retailers such as the bike-shop, picture framers, home-ware and furniture and other personal independent businesses that adds to the friendly character of the place. The position of the town in terms of visitors also needs to be exploited with the food and drink offer presented better and more legible to passers by and people travelling through the town. The role of the Market Square in terms of markets and events and the nearby Cinema, Library and Museum is key to presenting a number of key attractions that visitors would drop into and explore. The town is also at the start of the Ebbw Fach trails with walks to Nantyglo Roundhouses and also to the Clydach Railroad. It is within close driving distance of the World Heritage site, Big Pit Mining Museum and Blaenavon town centre.

Figure 12: Analysis Role and Function within Brynmawr Town Centre



Source: Miller Research (UK) Ltd

12. Conclusion – Key Recommendations

Brynmawr is currently functioning reasonably well but is in danger of being affected by the presence of the edge of centre Lakeside Retail Park. Its traditional primary retail area at Beaufort Street appears to be fragile with some targeted investment required to consolidate and strengthen its town centre retail offer.

Specific issues to address include:

- Redevelopment of Bus Depot site and linkage of Lakeside Retail Park with town centre, so that linked trips are made and direct expenditure in the town centre is undertaken;
- Redevelopment of the former Haven building;
- Redevelopment of former Welsh School and linkage with Beaufort Street so that activity is drawn into the town centre;
- Limiting the number of further non A1 uses in the primary retail area so that a more cohesive range of retail goods and services is presented to shoppers;
- Shutters - discourage external shutters so that the key frontages are attractive during the daytime and in the evening and that the town appears to be open for business;
- The town needs to find its identity to compete against neighbouring centres, with its strong sense of business community and a number of key destination retailers being key assets to its future marketing.

A1 – Retailer Feedback

Retailer Consultation - Blaenau Gwent
Feedback
Feb-11

Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	**Would you consider units in any of the 5 towns? If so, which and what is the requirement?**	**If not, why not?**					
Wilkinsons	Considering Ebbw Vale - requirement is for a unit of around 10,000 sq.ft	Looked at Tredegar but discounted due to size of town and other towns too small.	Yes	No	No	No	No
Greggs	Are in all towns apart from Blaina	Would not consider Blaina as too small	Yes	Yes	Yes	Yes	No
Timpsons	Going into the Tesco store as a kiosk.	Other towns too small. Looked at Tredegar but felt it was covered by neighbouring towns.	Yes	No	No	No	No
Ladbrokes	Currently in Ebbw Vale, Blaina, Brynmawr and Abertillery but would not consider Tredegar as there was too much competition.	Too much competition - already catered for.	No	No	No	No	No
Burton / Top Shop	No to all towns.	Market too small in all towns.	No	No	No	No	No

Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	**Would you consider units in any of the 5 towns? If so, which and what is the requirement?**	**If not, why not?**					
BHS	No to all towns.	Market too small in all towns.	No	No	No	No	No
Coffee No.1	No to all towns.	Demographics not affluent enough.	No	No	No	No	No
Caffe Nero	No to all towns.	Demographics not affluent enough - towns too small and their targets are larger towns and cities.	No	No	No	No	No
Shaws	No to all towns.	Currently in Tredegar but trading poorly. No appetite for expansion in these locations. Felt that town centres were not performing well.	No	No	No	No	No
Costa	Would consider Ebbw Vale - would need a unit of 1,300 sq.ft plus in a prime location in town.	Ebbw Vale is a possibility but other towns not perceived to be attractive enough at the moment.	Yes	No	No	No	No
New Look	In all towns except Blaina	Too small	In	In	In	In	No
Subway	In Ebbw Vale, but need new franchisee to reopen	Other towns too small and not affluent enough	In	No	No	No	No

Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	**Would you consider units in any of the 5 towns? If so, which and what is the requirement?**	**If not, why not?**					
Marstons	Yes to Tredegar, Ebbw Vale requiring circa 1 acre of land on main arterial routes	Abertillery & Blaina too small	Yes	Yes	In	No	No
Cash Generators	In Ebbw Vale, and no to all other towns	Catchment population too small to justify another branch in the vicinity	In	No	No	No	No
Superdrug	Awaiting feedback			In		In	
Marks & Spencer	Awaiting feedback						
Card Factory	In Ebbw Vale and Tredegar. Would consider trialling Abertillery for a 6/12 month period to see if sufficient demand	Blaina is too small. Unsure on Brynmawr and proximity to Tredegar/Ebbw Vale	In	In	Unsure	Trial	No
Lidl	In Tredegar and no to other towns	Other towns have too small a catchment to get board approval at present. This may change in the next 2 years, but is the reason Brynmawr was rejected.	No	In	No	No	No
Aldi	In Ebbw Vale and recently closed Tredegar.	Insufficient population to justify another store in the vicinity.	In	Closed	No	No	No
One Stop	They would consider all towns but each opportunity is considered on its merits and dependent upon competition analysis. Would need a unit of 2,000 to 2,500 sq.ft.	Blaina is unlikely due to existing offering from Co-op and Premier.	Yes	Yes	Yes	Yes	Unlikely

Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	**Would you consider units in any of the 5 towns? If so, which and what is the requirement?**	**If not, why not?**					
Tesco Express	Awaiting Feedback						
Sainsburys Convenience	Not meet their demographics at present. Looked at Woolworths in Ebbw Vale and turned it down, However demand to take 1000 across the country in next few years so will have to consider less desirable opportunities. Therefore if 3500/4000 sq.ft became available in next couple of years would need to consider.		Future	Future	Future	Future	No
Edinburgh Woollen Mill	In Festival Park but not a great success. However landlord gave them a good deal to stay last year and new landlord is working hard on the factory outlet scheme to make it a destination.	The socio demographics of the region and core customer penetration are far too low in Blaenau Gwent. They require 30% ccp whilst Ebbw Vale, Tredegar and Abertillery currently only have 1%ccp.	No	No	No	No	No
Store Twenty One	In Ebbw Vale and Brynmawr. Would take Abertillery and Tredegar. Want between 3000 and 5000sqft ground floor sales and 1500sqft back up. In prime position but difficulty finding size.		In	In	Yes	Yes	No
Sports Direct	In Festival Park and also Merthyr. No other requirements	Not sufficient population to sustain another store in the region. Would not want to relocate from Festival park to town centre as trades satisfactorily at present time	No (in Festival Park)	No	No	No	No

Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	**Would you consider units in any of the 5 towns? If so, which and what is the requirement?**	**If not, why not?**					
Bargain Booze	In Tredegar and Rassau. They are led by the franchisee coming to them and wanting to become a Bargain Booze store. Cannot be any closer than 1.5 miles from another store	Ebbw Vale too close to Rassau store so franchisee is protected	No	In	Yes	Yes	Yes

EBBW VALE - OCCUPIER REPORT

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1. Purpose

The decline of Blaenau Gwent's town centres has been recognised and identified by Blaenau Gwent County Borough Council's strategic assessment of risks and challenges, and their revitalisation is a priority for the Council.

A number of key strategic regeneration projects are being implemented across their town centres which have a focus on environmental improvements, enhanced visitors infrastructure and the redevelopment of key sites that are close to a number of town centres. In addition to the physical investment taking place, the Council wants to promote the town centres to investors so that there is a co-ordinated approach to physical regeneration and local investment.

The key objectives of this report are therefore:

- To establish an accurate picture of the potential investors that could be attracted to the County Boroughs town centres;
- To target and attract increased retail/mixed use/other investment to the town centres utilising a professional and consistent promotion method; and
- To develop and promote the identified retail hierarchy and complementary roles of our town centres as outlined in the draft deposit BGCBC LDP.

Not a specific task of the Occupier Suitability Report, but linked to the overall project is also the need to develop a Marketing Strategy/Plan which aims to engage and attract both the private sector and members of the public towards the various opportunities within the Town Centres. There is therefore a direct relationship between the Occupier Suitability Report and the Marketing Strategy/Plan as it provides the current mix of town centre occupiers, potential targeted retailers and investors and finally how the future role and function should be projected to shoppers and to investors. This body of analysis is therefore important to how any town centre brand or marketing strategy is developed and responds to the actual investment opportunities and fulfils the respective role and function of each town.

2. Process & Methodology

In support of preparing a Marketing Strategy for the town, this Occupier Suitability Report sets out the following:

1. Current retail offering within the town;
2. Identifies potential gaps in retail offering in terms of sector and also potential specific retailer identity.

In preparing the Report, the following activities have been undertaken:

- Familiarisation/Information Gathering
  - Detailed site visits to the five town centres;
  - Photographic records of all shop fronts;
  - Obtained occupier data from the current Valuation Office Rating List;
  - Valuation Office information was cross checked with information from site visits; and
  - Categorise occupier lists and input into a database.
- Analysis/Occupier Interviews
  - Analysis of occupiers by sector, category and retailer identity using filters and sorting techniques;
  - Identify retailers with requirements for towns in South Wales and also focusing on towns in Valleys locations;
  - Analysis of other towns to identify retail gaps (Blackwood, Merthyr Tydfil, Abergavenny) as well as detailed analysis of other towns in Blaenau Gwent to identify which retailers are in one town but not others;
  - Direct contact with retailers to establish requirements for towns;
  - Contact with selected stakeholders and investors; and
  - Interviews with a sample of local businesses and business forum representatives.
- Reporting
  - Report on retailer feedback;
  - Review of existing vitality and viability data held by the Council;
  - Analysis of town centre data to identify distinctive clusters;
  - Assessment of the role and function of the town centre;
  - Identify retailers with potential requirements for the town over timescales; now, 2011-2016 and 2016-2020; and
  - The report has also considered the current development opportunities presenting themselves within the town and commented as to potential retailer suitability.

3. Ebbw Vale Town Centre

3.1. Strategic Context

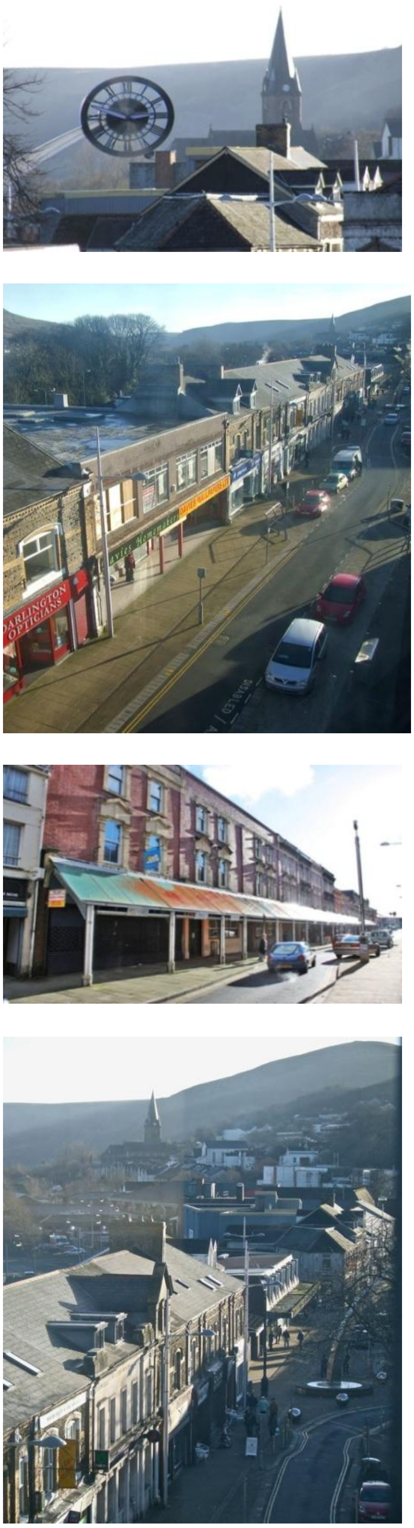
Ebbw Vale is the largest town centre within Blaenau Gwent's five town centres at approximately 268,852 sq.ft[1]. Whilst the local town wards have a population of 8,944 (2001 Census) the Ebbw Vale area has a total population of 23,622 which includes communities such as Rassau, Beaufort, and Cwm. Due to its strategic focus for Council services, education, and leisure and more recently with the opening of the new hospital on the Works site, the town centre has a key role to play in providing shopping and other services for its residents. Investment in the rail link to Cardiff, dualling of the Heads of the Valleys road corridor and the ongoing redevelopment of the former Corus Steelworks, known as the Works, points to the strategic opportunities the town is working to unlock.

The town centre is contained within the A4046 with the main shopping street starting at Market Square and finishing at the junction with Armoury Terrace in physical town centre terms. However, in primary retail areaterms the main shopping offer stops at the junction with service road from the The Walk Shopping Development. In addition to retail, the main police station, library, health centre, bus station, taxi rank and public toilets are key facilities that town centre users frequent. The town centre has been enhanced through public realm improvements, a timepiece feature and the creation of a -pedestrian friendly area with the popular weekly market held in this central space.

The main free multi storey car park is accessed from James Street with other pay and display parking to the rear of The Walk Shopping Development. Some limited stay parking is available within the town centre as well as further on towards Armoury Terrace.

Out of town retail is located at Tesco off the A4046 and Morrisons and Focus at Rhyd-y-BlewRetail Park. Ebbw Vale Festival Park Factory Outlet Centre is located at Festival Park at the former Garden Festival and offers a broad range of discounted comparison goods.

Figure 1 : Images of Ebbw Vale town centre



Source: Stuart Hogg Property

[1] Stuart Hogg Property / VOA data

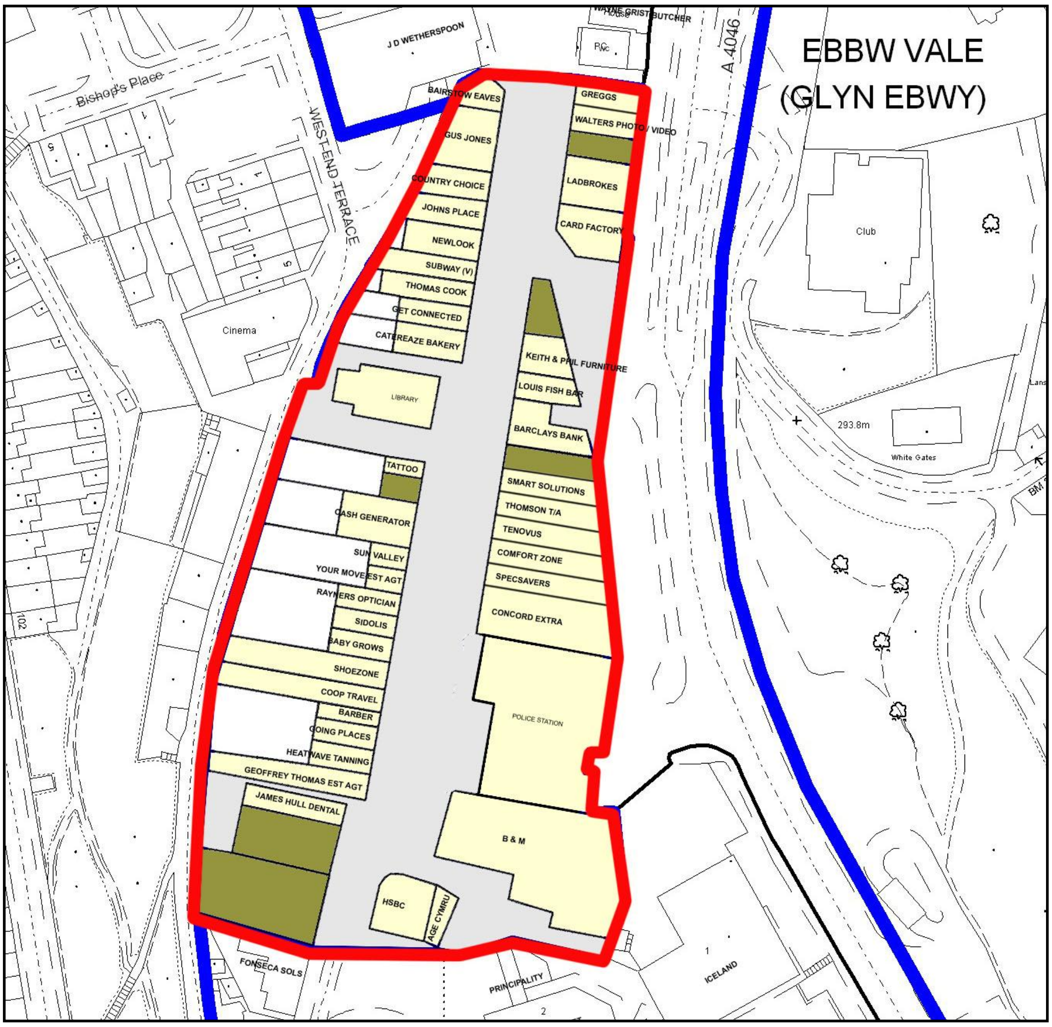
3.2. Headline Statistics

The following table presents the key retail statistics for Ebbw Vale with Figure 2 below showing the proposed Local Development Plan Primary Retail Area and the local location of vacant buildings as of 25th January 2011.

Table 1: Ebbw Vale Retail Statistics

Total floor area of retail space analysed	24,917 sq.m (268,206 sq.ft).
Number of retail units	109
39 units in Primary Retail Area	(7,451 sq.m)
70 units outside the Primary Retail Area	(17,466 sq.m)
Number of Vacant Units	13 (7 outside Primary Retail Area, 6 in Primary Retail Area) with a total of 1,573 sq.m which equates to **6.3%** of the total retail space

Figure 2: Ebbw Vale - Primary Retail Area showing vacant units as at 25 January 2011 (dark)



Source: Stuart Hogg Property, January 2011

Although the Primary Retail Area is tightly drawn in the emerging LDP, the prime pitch extends northwards to incorporate Market Street and south eastwards to include the Walk Shopping Centre, which in our view should also form part of the Primary Retail Area.

3.3. Vitality and Viability

The following summary is drawn from existing retail studies[2] that have been provided by Blaenau Gwent County Borough Council and observations from site visits in January 2011:

Shoppers' Attitudes

CACI data compares Ebbw Vale to centres such as Blackwood and Monmouth in its rural centres classification with it ranked 6th in the Welsh ranking of Rural Centres;

- Ebbw Vale captures 7.5% of its total annual retail expenditure from its 273,698 residents within its retail catchment;
- In its core catchment, Ebbw Vale retains 34% of its market share with it increasing to 48% as you turn to its primary catchment;
- Clothing and footwear account for 15.8% of the total expenditure, with durables accounting for 12.8% per year;
- The CACI analysis concludes that Ebbw Vale is under provided for in terms of comparison goods in relation to its catchment population size.
- 41.6% of respondents to a household telephone survey indicate they conduct their main food shop at the Ebbw Vale Tesco, with 28.8% of respondents shopping at the Morrisons store in Ebbw Vale;
- In terms of locations to purchase non-food items, Ebbw Vale was the most popular at 26% with Cardiff City Centre at 22% being the second most popular;
- 88.8% of all respondents surveyed visit Ebbw Vale for their shopping. 57.7% of the 222 respondents who visited Ebbw Vale stated that the main reason was due to the closeness and or convenience to their home;
- 40% of shoppers when asked what would make them visit the area more frequently identified a better choice/range of non-food shops;
- The most popular method of transport to the town was by car / van as the driver, as almost a third of all respondents stated this (32.9%). Whereas, over a quarter (29%) of respondents travelled to the town on foot; and
- When asked what would improve people's visit to Ebbw Vale, 36.2% and 52.2% identified a better choice/range of non-food and food shops, respectively.

Accessibility

The flat nature of the town centre and close proximity of the main off street car parks and public transport/taxi ranks are key attractors to the town centre. The pedestrian-friendly nature of the main town centre helps general mobility around shops and local services. Disabled parking is provided for close to the town centre streets with buses running at regular intervals. Buses run locally to Beaufort, Garnlydan, Hilltop and Tredegar and across South Wales to Aberdare, Abergavenny, Cardiff, Cwmbran and Newport.

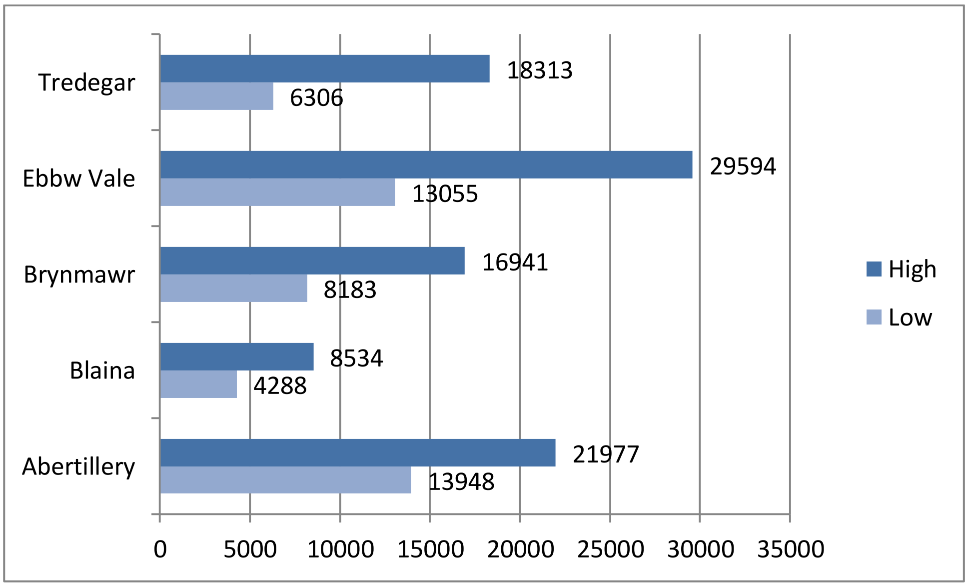
[2] CACI Town Centre Health Checks, January 2008

The new train station is approximately 1.5 miles away to the south of the town centre which is connected by bus and has parking provision. This would be further enhanced through the proposals to extend the line up to the Works Project Office and subsequent links to the town centre proposed.

Footfall

Due to the flat and linear nature of the town centre, it is easy to walk to and from your intended shop or destination. The wide character of the streets allows for people to dwell and engage in activities such as the weekly market. The footfall figures reflect the principal town centre focus that Ebbw Vale has with shoppers, visitors and workers using the town centre with monthly figures showing an average of 75,000 people visiting the town centre.

Figure 3: Pedestrian Footfall Figures – Blaenau Gwent Town Centres



Source: Blaenau Gwent Pedestrian Footfall Counts (April 2009 – March 2010)

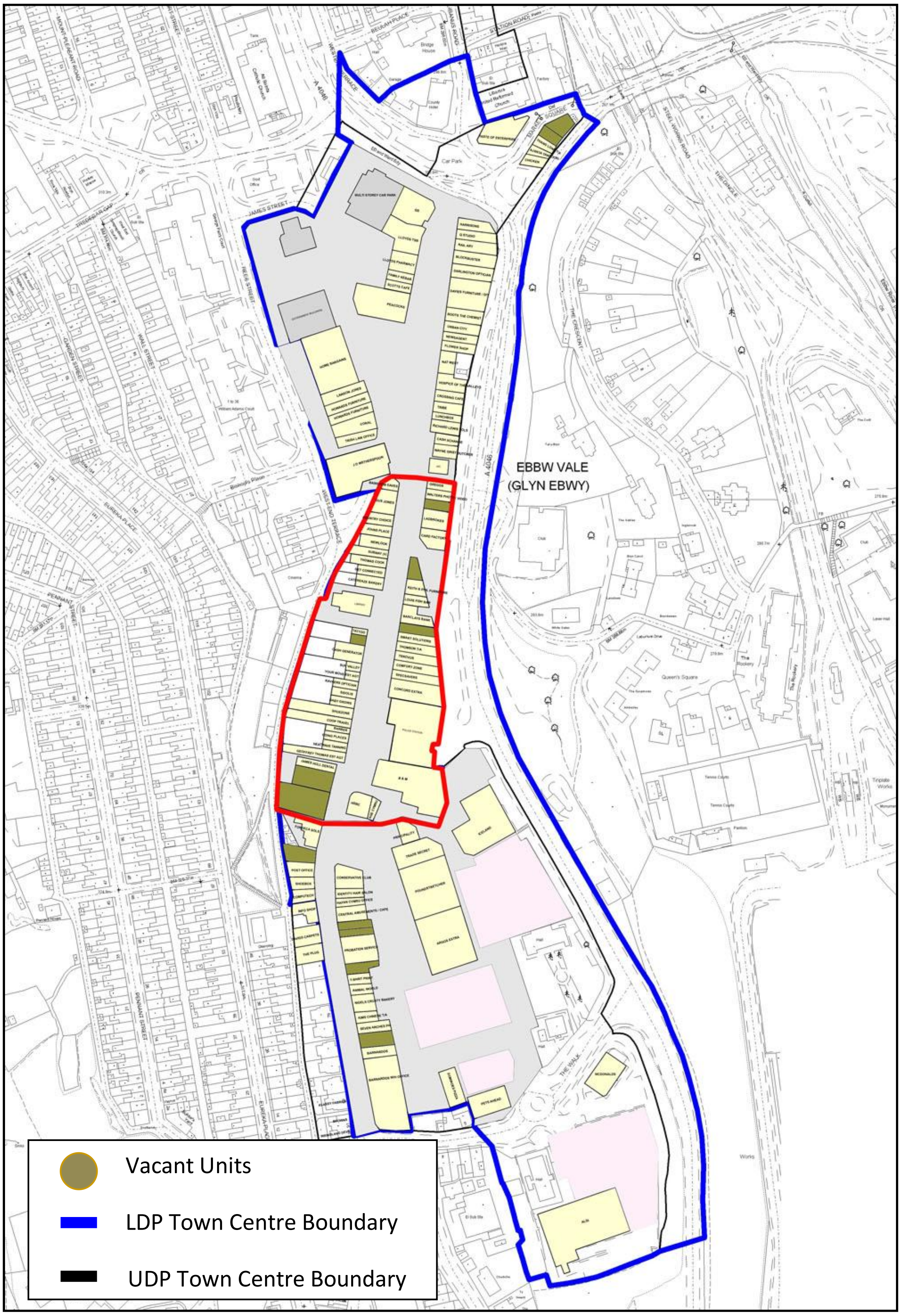
Vacancy Rates

Ebbw Vale has a vacancy rate of 11.8% (in terms of number of units, 6.3% of floorspace). Some of the vacant units are in prime sites sometimes due to tenants moving within the town centre, specific aspect and visibility of the unit, constraints on size of unit and a lack of servicing. This rate is well below the national UK average which should not be ignored, yet large voids do exist at key frontages at pedestrian nodes.

4. Town Analysis Maps

The following analysis develops the initial retail statistics in relation to the distribution of vacant units, presence and location of national retailers and where non A1 uses tend to be situated.

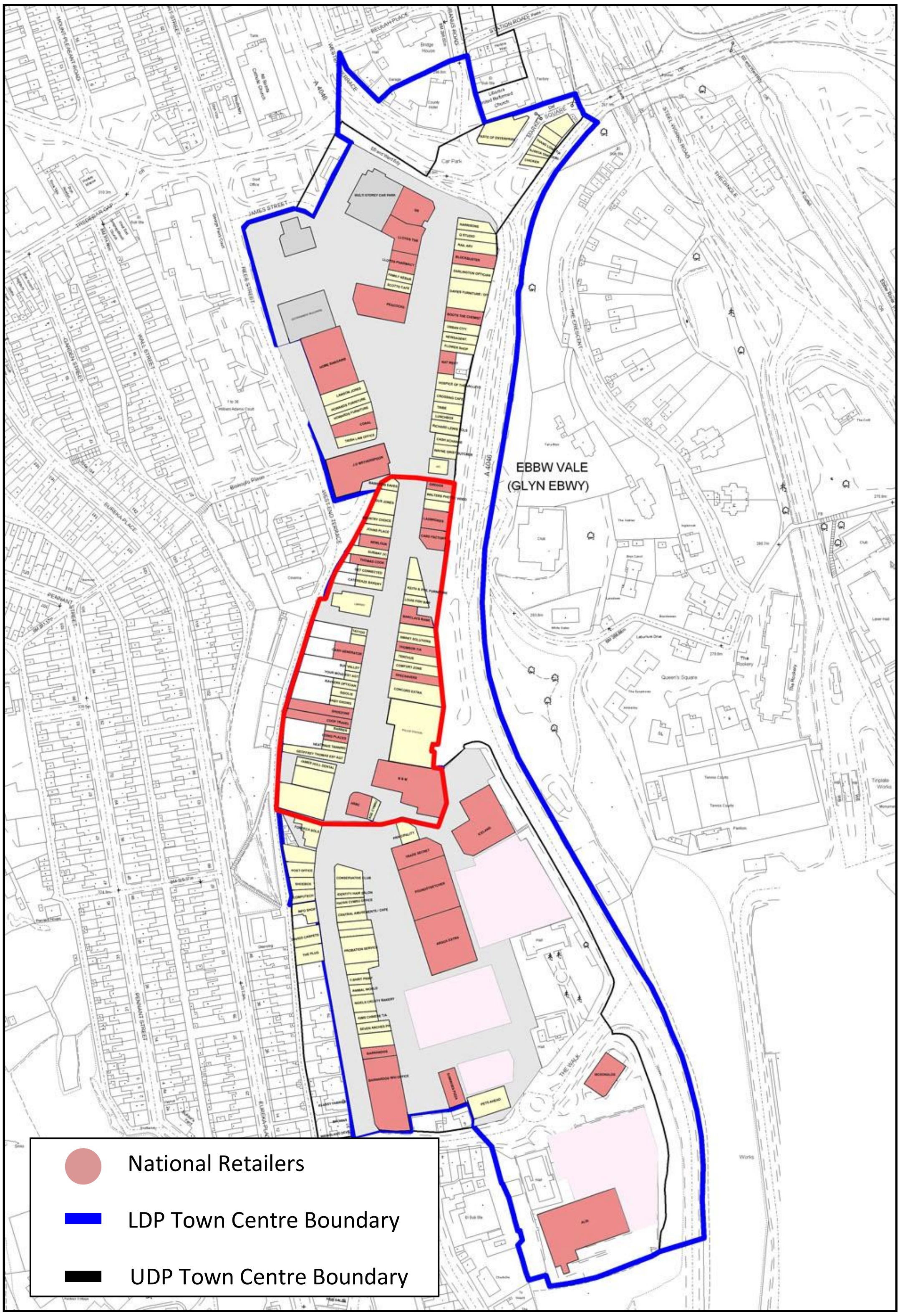
Figure 4: Location of Vacant Units, Ebbw Vale



Source: Stuart Hogg Property, January 2011

The Vacant Unit Analysis Map shows a high level of occupancy both in the Primary Retail Area and also outside. The northern end of Bethcar Street in particular is shown as being well occupied with no void units. The large void units at the southern edge of the core reflect how the prime area in town has tended to move northwards although they are in good proximity to the entrance to the Walk Shopping Centre.

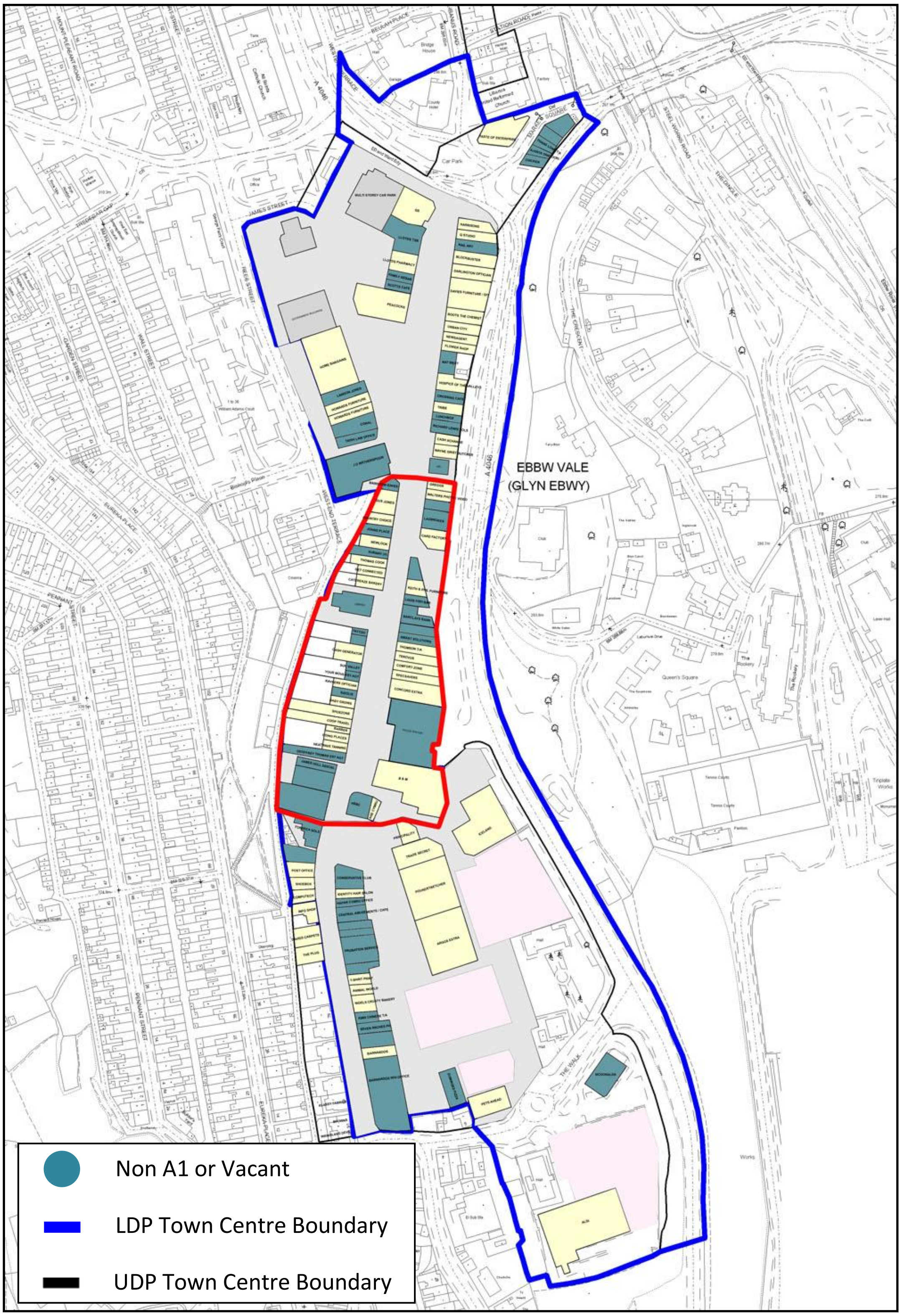
Figure 5: Location of National Retailers, Ebbw Vale



Source: Stuart Hogg Property, January 2011

The National Retailer Analysis Map shows a high proportion of national retailers, reinforcing the town as a principal centre in the retail hierarchy. In addition to the retail area, there are national retailers represented in the northern part of Bethcar Street and also, larger units at the Walk Shopping Centre.

Figure 6: Location of Non A1/Vacant Property, Ebbw Vale



Source: Stuart Hogg Property, January 2011

The Non A1 and Vacant Analysis map shows a reasonable mix of uses. The southern end of Bethcar Street is characterised by non-A1 uses and is unlikely to be a suitable location for most A1 retailers.

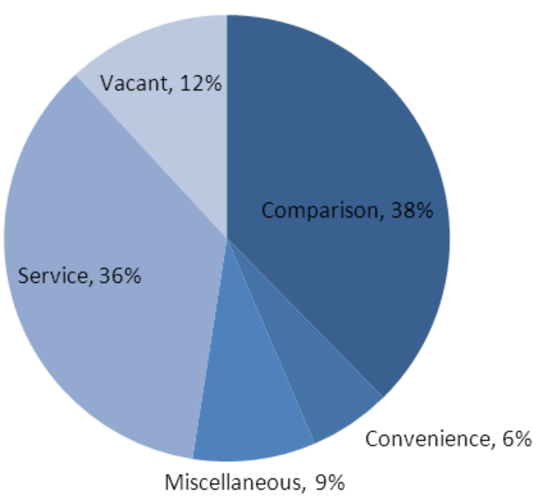
4.1. Category Analysis of Occupiers - Ebbw Vale

The following table presents the key retail statistics for Tredegar with Figure 2 below showing the draft deposit Local Development Plan retail area and the local location of vacant buildings as of 25th January 2011.

Table 2: Occupier Analysis – Retail Category - Ebbw Vale

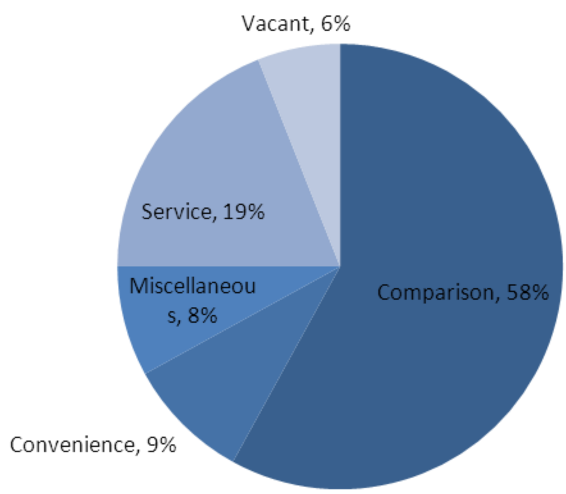
Category	Data	Total
COMPARISON	Count of Occupier	42
	Sum of Total area m2	14,787
CONVENIENCE	Count of Occupier	7
	Sum of Total area m2	2,257
MISCELLANEOUS	Count of Occupier	10
	Sum of Total area m2	1,917
SERVICE	Count of Occupier	40
	Sum of Total area m2	4,730
VACANT	Count of Occupier	13
	Sum of Total area m2	1,625
Total Count of Occupier		112
Total Sum of Total area m2		25,316

Figure 7: Number of Units



Source: Stuart Hogg Property, January 2011

Figure 8: Percent of Floor Space



Source: Stuart Hogg Property, January 2011

The following tables show the breakdown of occupiers (as at January 2011) by specific uses (total ground floor area and number of units). Dominant retail sectors are highlighted in the table.

Table 3: Breakdown of Occupiers by Retail Sector, Ebbw Vale

Sectors	Sum of Total area m2 Total	Count of Occupier Total
ART / BOOKS / STATIONERY	585	1
BABYWEAR	82	1
BAKER	249	3
BETTING OFFICE AMUSEMENTS	532	4
BUTCHER	87	1
CAFÉ	604	5
CHARITY	927	4
CHEMIST / OPTICIAN	832	5
CTN	58	1
DENTAL	168	1
ELECTRICAL	429	4
ESTATE AGENT	258	3
FINANCIAL SERVICES	1,061	7
FLORIST	91	1
FOODSTORE	1,834	2
FOOTWEAR	359	2
FURNITURE	3,573	6
GENERAL CLOTHING	1,404	5
GIFTS	284	1
GREENGROCER	126	1
HARDWARE	340	1
JEWELLER	160	1
OFFICE	926	6
PETS	289	2
PUB	935	3

RECRUITMENT	56	1
SALON	345	6
TAKEAWAY	**752**	**9**
TRAVEL	308	4
VACANT	1,573	13
VARIETY	**4,901**	**6**
WOMENS CLOTHING	1,135	2
Grand Total	**25,316**	**112**

4.2. Distinctive Clusters

Figure 9 shows that there is a strong service sector within Ebbw Vale including travel agents, estate agents, financial services and hair and beauty.

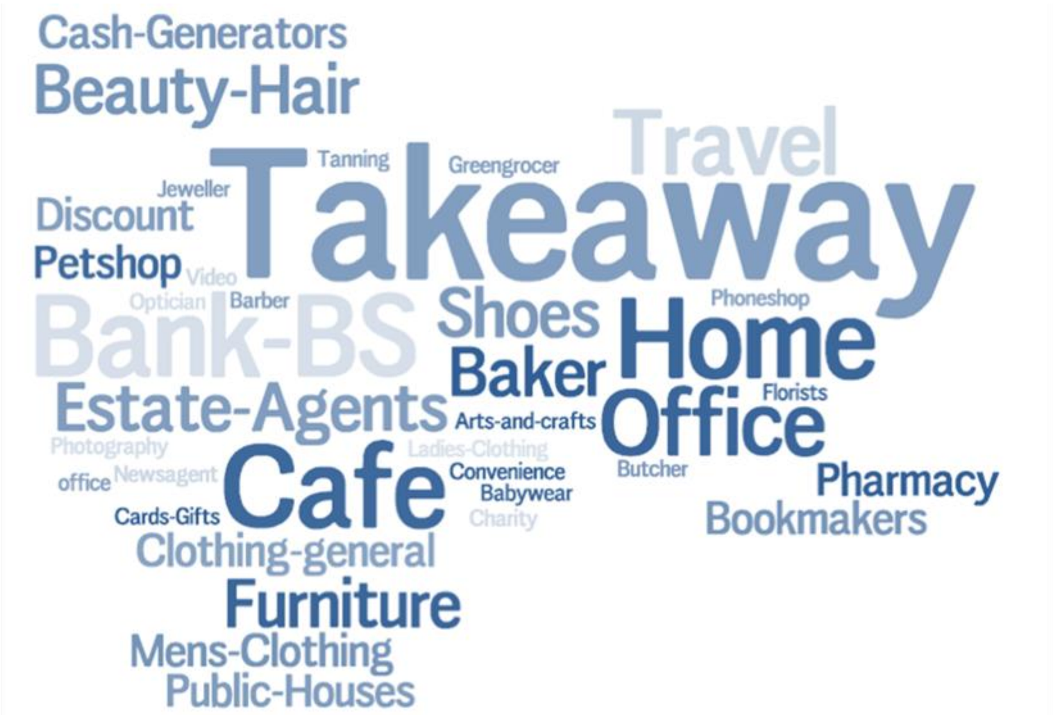
When looking for distinct clusters there are some traditional cafes such as Sidolis, the Crossing with Louis' Fish Bar supported by other cafes and sandwich bars, being a local draw. As with some of the other district centres, furniture and home-ware emerges as a strong sector with Davies, Howards KP Furnishers and Comfort Zone creating a good range and choice. These are further supported by hardware stores, e.g. Harrisons and the carpet shop. With regard to single distinct retail lines, Pins and Things offers specialist needlecraft goods, babywear provided by Baby Grows and Wayne Grist being the only butcher in the town centre.

In terms of specialist stores in the town, Harrison offers hardware and DIY with Walters providing specialist photographic equipment. The Taste of Enterprise centre provides a place to showcase the best of local arts and crafts but due to it being divorced from the main town centre, has not really stimulated any artisan or specialist feel to the town centre.

As recognised by the Council there is a dominance of takeaways within Ebbw Vale town centre, although the town centre has the least number of takeaways across the five town centres and are predominently concentrated in Market Square.

The key challenge in Ebbw Vale is that there is no critical mass of distinct retail groupings due to the physical nature of the town and the presence of neighbouring vacant properties as well as some poorer quality businesses being present. There is however a breadth to the retail offer in terms of comparison shopping that attracts shoppers and this is a key selling point that needs to be developed through the marketing strategy.

Figure 9: Distinctive Clusters - Ebbw Vale



Source: Miller Research (UK) Ltd

5. Market Commentary

Ebbw Vale is seen as a regionally significant town although is competing against new out of town retail developments at Cyfartha in Merthyr Tydfil and the Festival Shopping Centre at Ebbw Vale. There is also competition from the out of townstores of Tesco and Morrison to the north which undoubtedly attract trade from a large catchment but do not connect with the town centre.

Nevertheless, the traditional high street has been resilient to the difficult market conditions over the last four to five years and this is reflected in the relatively few vacant units. There is also a high proportion of national retail representation that is not present in other Blaenau Gwent town centres. However, the town is hampered by a significant number of small units in the high street that are too small for many requirements and it is therefore difficult for national retailers to get representation in the prime area. There is, however, a number of potential development sites identified that provide opportunity for larger format units that are close to the primary retail area.

Bethcar Street, north of its junction with the Walk Shopping Centre and Market Street to the north has performed well and the Walk Shopping Centre itself, not currently shown as being within the primary retail area, but performing the function of the town's prime shopping area is perceived to be trading reasonably well. The southern end of Bethcar Street struggles from a retail perspective and is characterised by non A1 uses and a relatively high level of vacant units.

Zone A rents - a measure of value for retail space are currently in the region of £230 per sq.m for prime units, which is currently being achieved within the primary retail area.

Lettings in Ebbw Vale over the last 5 years include (non-exhaustive):

- 12 Market Street (Urban City Clothing)
- 18 Market Street (Tribe Clothing)
- 20a Market Street (Cash Xchange)
- 24/25 Market Street (Ladbrokes)
- 25a Market Street (Card Factory)
- 23 James Street (Coral)
- Former Kwik Save, James Street (Home Bargains)
- 13 Bethcar Street (Subway)
- 19 Bethcar Street (Catereaze Bakery)
- 6 Bethcar Street (Keith & Phil Furniture)
- 16 Bethcar Street (Smart Solutions - Recruitment)
- 23 Bethcar Street (Tattoo)
- 27 Bethcar Street (Cash Generator)
- 31 Bethcar Street (Your Move Estate Agents)
- 37 Bethcar Street (Baby Grows)
- 32 Bethcar Street - former Woolworths (B&M)

6. Demand

The current / recent national requirements for Ebbw Vale that have been identified are:

- Ramsdens (Pawnbrokers) - 600 to 800 sq.ft
- Wilkinsons - currently looking at options within the town.

We are also aware of a number of smaller, independent requirements for Ebbw Vale derived from our recent marketing of units in the town (accountants, phone shop, furniture shop).

A number of the lettings that have taken place over the last 5 years have been to discount or value retailers (B&M, Home Bargains, Cash Xchange, Cash Generator). This is a trend that has been repeated across other towns in South Wales and indeed the UK as a whole as traditional high streets face competition from retail parks and on-line sales at a time when consumers are focused on getting value for money.

Interviews with agents suggest that there are few current national requirements for the town and the perception is that requirements will tend to favour the Festival Shopping Centre rather than the town centre. However, despite not appearing on retailers active requirement lists, the town's size and existing retail offering will undoubtedly appeal to a number of retailers that could be targeted as part of the Marketing Strategy. It is also reasonable to assume that in the medium and longer term, provided the town centre continues to be a focus for investment, that other retailers will have requirements for the town centre.

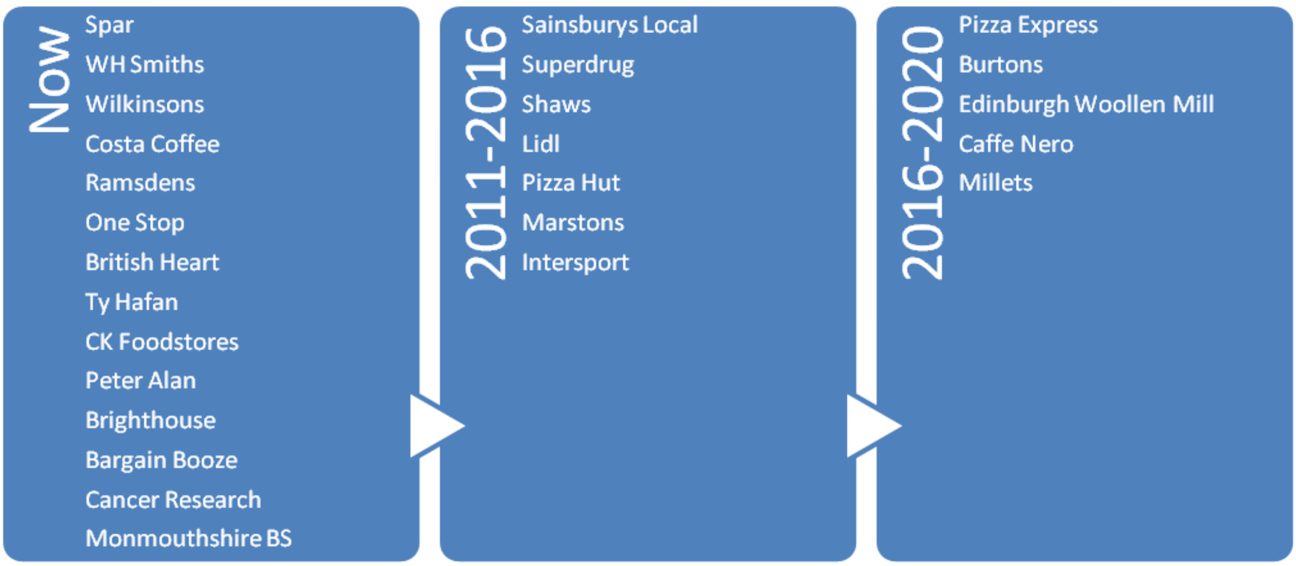
7. Gap Analysis

Retailers / types of retailers that are not represented or under-represented in the town that could be targeted:

- Butcher (only one currently)
- Cafe
- Confectionary / tobacco / news (only one currently)
- Off licence (no representation)
- Toys
- Sports
- Gifts (only one card shop)
- Motor spares (although one currently on the periphery of the town)
- Jeweller (only one currently)
- Florist (only one currently)
- Phone shop - only one currently
- Quality Charity Shops (currently 4)
- Book Shop
- Camping / outdoor
- Estate Agents
- Restaurants (evening economy)

Having carried out the gap analysis and retailer consultation, examples of the retailers that could be targeted over the short / medium / longer term would be as follows:

Figure 10: Future Timeline for Targeting Occupiers - Ebbw Vale



The feedback from our enquiries of retailers and experience in the market is that there is a tendency for the more up market brands to want to be located in the Festival Shopping Centre if they are going to come to Ebbw Vale, unfortunately often at the cost of the town's ability to pull in other retailers.

Sainsburys Local has an aspiration to expand their representation significantly and whilst they looked at the former Woolworths, they felt that the demographics were not appropriate. They do confirm, however, that as they grow their representation they will need to revisit some of the locations previously discounted.

Costa Coffee has confirmed that they would consider a prime location in town.

Wilkinsons have confirmed that they have a current requirement for the town and are considering options.

8. Availability

Properties that are currently being actively marketed are as follows:

- 55 Bethcar Street - this vacant unit (formerly Ethel Austin) comprises ground floor sales of 3,020 sq.ft and a first floor ancillary of 2,036 sq.ft - the quoting rent is £27,000 per annum.
- 23 Market Street - this vacant unit comprises a ground floor sales area of 715 sq.ft plus a first floor of 336 sq.ft. The quoting rental is £15,000 per annum and the Rateable Value £11,000 (£4,499 payable 2010/11).
- 14 Bethcar Street - this vacant unit comprises a ground floor sales area of 876 sq.ft plus a basement stores of 519 sq.ft. The quoting rental is £15,000 per annum and the Rateable Value £11,500 (£4,090 payable 2010/11).
- 2-4 Bethcar Street - a freehold property, formerly Darlington Opticians available at £99,950 or rental at £10,000 per annum - no floor areas quoted (approximate GF sales 500 sq.ft).
- 48/48a Bethcar Street - GF sales 584 sq.ft plus first and second floor rooms available to let at a quoting rent of £10,800 per annum.
- 66 Bethcar Street - lock up shop (no size given) - available at £2,400 per annum.

As with other towns, there are a number of vacant units that do not appear to be currently actively marketed.

9. Ebbw Vale – SWOT Analysis

Table 4: SWOT Analysis - Ebbw Vale

Strengths	**Weaknesses**
High representation of National Retailers at the Walk Availability of parking Diversity of tenants Recognised as an important regional town Relatively low rents Free parking	Large visible vacant units at southern end of Bethcar Street Southern end of Bethcar Street not functioning for retail Shutters create dead frontages Limited spending power Small units – not suitable for national retailers Current linkages between the Walk and the rest of the town centre
Opportunities	**Threats**
Development land owned by Sterling Estates Identification of Action Areas at the Southern Gateway and Market Square Identified development sites Better linkage with the Walk Shopping Centre Potential links with The Works Site Develop shopping experience Festival Shopping Centre - joint marketing Action Area at the Southern Gateway	Competition from neighbouring centres outside of the County Borough Festival Shopping Centre

10. Appraisal of Development Opportunities

The Triangle Site - This is located at the northern end of Bethcar Street and adjacent to existing national multiple retailers (Peacocks, Lloyds TSB, Lloyds Pharmacy). It should provide an opportunity to create additional retail space and has the ability to create modern units of an appropriate size. The site is currently in private hands (Sterling Estates) and in our view represents an obvious future development opportunity that would enhance the northern end of Bethcar Street.

Police Station - this site (approximately 0.25 acres) is located in a strong retail pitch with traditionally high levels of footfall. In the event of the Police deciding to relocate, it would represent an opportunity to create a well-designed addition to the retail area of the high street and would also remove a dead frontage. There could be an opportunity to attract a mid range quality food retailer to this site.

Former County Hotel Site to North of Market Street – this site is shown as being with the town centre boundary (although outside the primary retail area). Physically, it is separated from Bethcar Street by the A4046 and is, in our view, unsuitable as a retail location, especially given the current highway configuration. It is also on the periphery of the town centre and therefore currently unlikely to be suitable for retail requirements. However, the redevelopment of this site is identified as an action area in the Ebbw Vale Sustainable Regeneration Framework. The framework identifies the redesign of the junction arrangement with improved pedestrian movements and development opportunities for mixed-use development.

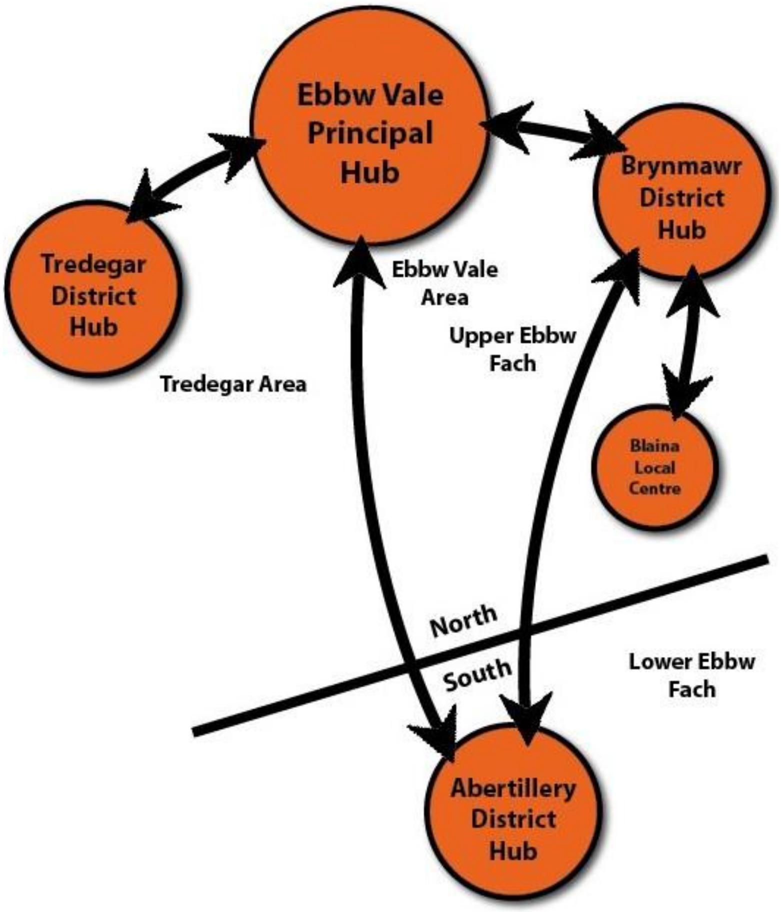
Link Proposals - these involve the potential development of a significant scheme linking the Walk Shopping Centre (and in turn Bethcar Street) with new transport links from the Works. They involve potential creation of retail space of two units around 10,000 sq.ft and 6,500 sq.ft plus upper floor commercial space. These size units could cater for unsatisfied demand for the town (for example Wilkinsons) and also build on the success of the Walk Shopping Centre. In our view they will add further critical mass to the retail centre and help to retain more trade within the town centre and improve the retail offering.

Southern Gateway – the Ebbw Vale Sustainable Development Framework identifies an opportunity for an office development and proposed new food store on land at the Southern Gateway.

11. Role and Function

The Council has sought through this study to further develop specific and complementary retailing roles and functions for each of the five town centres that can be utilised in the development of the town centre branding and associated marketing material.

Figure 11: Proposed Retail Hierarchy – Role and Function –Draft Deposit Local Development Plan 2011



Ebbw Vale town centre is identified as a principal town centre in the draft Deposit Local Development Plan. Its strategic location within the County Borough and within the Heads of the Valleys sub region does lend itself to a town centre that is significant in terms of serving a significant resident population and catchment, is located close to key administrative functions and services and its connectivity to key strategic roads, rail and other infrastructure. The town centre compared to other Blaenau Gwent retail centres has a higher proportion of national retailers with some well known brand names, accommodated within the main Market Street and in new development within the Walk Shopping Centre.

The town centre has located within it a range of community facilities such as a Library, Learning Action Centre, Police Station alongside a number of High Street banks and other key services. The strategic investment taking place on the Works site, with new facilities such as the Aneurin Bevan Hospital and planned Learning Campus developments and new accommodation for Gwent Records and Genealogy Centre adds to the town being a key service and administration hub. There is also additional scope along the Northern Corridor towards the A465 for potential development that adds to the critical mass of services and infrastructure for Ebbw Vale. The town is also in proximity to attractions such as the Festival Shopping Centre placing Ebbw Vale as a principal town centre within the County Borough as well serving shoppers from neighbouring local authority areas. The town also has a number of cultural facilities including Ebbw Vale Institute and nearby Beaufort Theatre, which add to the wider attraction of the town centre.

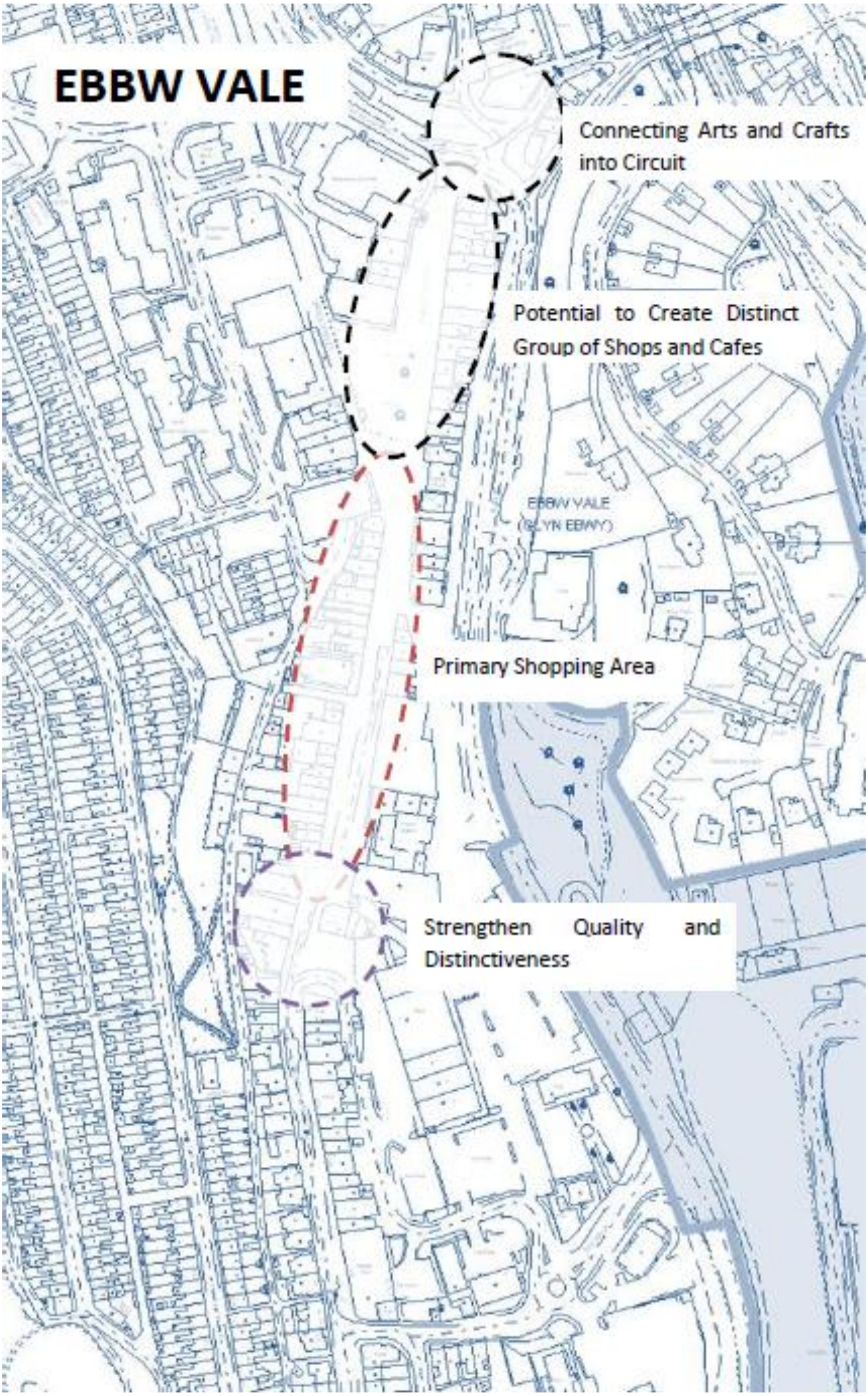
To fulfill its role and function as a principal town centre, it needs to develop a consistent and quality offer and provide a broad range of shopping. With the majority of convenience shopping at the out of centre locations such as Tescos off the A4046 and Morrisons at Rhyd-y-blew, there is a need to improve the quality of comparison shopping within the town centre. This needs to be addressed through occupying key strategic buildings and sites that works towards creating a more cohesive and confident offer. Medium to large format stores need to be provided for with missing or under represented retailers targetted such as sports, books, motor spares with additional support for the independent retail sector so that a balanced offer is achieved. To ensure a balanced town centre offer, the provision of a small “community” type food stores within the town centre would assist in providing basket type food shopping, appealing to town centre workers and shoppers as well as animating the primary retail area of the town centre.

The independent sector has no strong distinct clusters of retail but there are a number of well known businesses, shop-keepers and specialist products that attracts people to the town for specific purchases and for their personal services. This contributes to its key selling points and adds to the objective of consolidating and strengthening its comparison offer.

To ensure the town is welcoming to families, marketing the town centre for toys and general clothing is required with family friendly restaurants such as pizza need to be promoted. In terms of the evening time economy, opportunities for bistro/pub food should be explored so that the town has a more diverse evening time offer for families and visitors.

Finally, in strategic terms, the accessible and extensive nature of the town centre and closeness to the Works site and the Heads of the Valley road need to be marketed as key selling points for retailers and complementary operators.

Figure 12: Analysis - Role and Function - Ebbw Vale Town Centre



12. Conclusion – Key Recommendations

Ebbw Vale is functioning reasonably well as a retail location and has the opportunity to grow in importance as a regional town and to enhance shoppers' experience by improving retail mix.

Specific opportunities and issues to address include:

- The redevelopment of the Sterling Estates site within the main high street -
- Promotion of the Link site as a development opportunity that will accommodate larger format retail units;
- Limiting the number of further non A1 uses in the primary retail area so that a more cohesive range of retail goods and services is presented to shoppers;
- Shutters - discourage external shutters so that the key frontages are attractive during the daytime and in the evening and that the town appears to be open for business;
- Developing a solution or identity for the Southern end of Bethcar Street;
- The town needs to find its identity to compete against neighbouring centres out of the County Borough such as Merthyr Tydfil and Cwmbran so that people perceive Ebbw Vale as destination that has some key brand names, a good range and choice of comparison goods and can meet local shoppers need in terms of convenience and other needs;
- Revision of the Primary Retail Area contained in the draft Deposit LDP to include The Walk development. Consideration should be given to removal of the Former County Hotel site out of the proposed retail area in the LDP to facilitate non-retail uses such as residential, which we would consider a more appropriate use and would help consolidate the existing retail area;
- In light of our analysis, we would recommend that the Council, as local planning authority, make revisions to the draft deposit LDP town centre boundary and the primary retail area.

Appendix 1

A1 – Retailer Feedback

Retailer Consultation - Blaenau Gwent
Feedback
Feb-11

Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	**Would you consider units in any of the 5 towns? If so, which and what is the requirement?**	**If not, why not?**					
Wilkinsons	Considering Ebbw Vale - requirement is for a unit of around 10,000 sq.ft	Looked at Tredegar but discounted due to size of town and other towns too small.	Yes	No	No	No	No
Greggs	Are in all towns apart from Blaina	Would not consider Blaina as too small	Yes	Yes	Yes	Yes	No
Timpsons	Going into the Tesco store as a kiosk.	Other towns too small. Looked at Tredegar but felt it was covered by neighbouring towns.	Yes	No	No	No	No
Ladbrokes	Currently in all towns but would not consider Tredegar as there was too much competition.	Too much competition - already catered for.	No	No	No	No	No
Burton / Top Shop	No to all towns.	Market too small in all towns.	No	No	No	No	No

Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	**Would you consider units in any of the 5 towns? If so, which and what is the requirement?**	**If not, why not?**					
BHS	No to all towns.	Market too small in all towns.	No	No	No	No	No
Coffee No.1	No to all towns.	Demographics not affluent enough.	No	No	No	No	No
Caffe Nero	No to all towns.	Demographics not affluent enough - towns too small and their targets are larger towns and cities.	No	No	No	No	No
Shaws	No to all towns.	Currently in Tredegar but trading poorly. No appetite for expansion in these locations. Felt that town centres were not performing well.	No	No	No	No	No
Costa	Would consider Ebbw Vale - would need a unit of 1,300 sq.ft plus in a prime location in town.	Ebbw Vale is a possibility but other towns not perceived to be attractive enough at the moment.	Yes	No	No	No	No
New Look	In all towns except Blaina	Too small	In	In	In	In	No
Subway	In Ebbw Vale, but need new franchisee to reopen	Other towns too small and not affluent enough	In	No	No	No	No
Marstons	Yes to Tredegar, Ebbw Vale requiring circa 1 acre of land on main arterial routes	Abertillery & Blaina too small	Yes	Yes	In	No	No

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Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	**Would you consider units in any of the 5 towns? If so, which and what is the requirement?**	**If not, why not?**					
Cash Generators	In Ebbw Vale, and no to all other towns	Catchment population too small to justify another branch in the vicinity	In	No	No	No	No
Superdrug	Awaiting feedback			In		In	
Marks & Spencer	Awaiting feedback						
Card Factory	In Ebbw Vale and Tredegar. Would consider trialling Abertillery for a 6/12 month period to see if sufficient demand	Blaina is too small. Unsure on Brynmawr and proximity to Tredegar/Ebbw Vale	In	In	Unsure	Trial	No
Lidl	In Tredegar and no to other towns	Other towns have too small a catchment to get board approval at present. This may change in the next 2 years, but is the reason Brynmawr was rejected.	No	In	No	No	No
Aldi	In Ebbw Vale and recently closed Tredegar.	Insufficient population to justify another store in the vicinity.	In	Closed	No	No	No
One Stop	They would consider all towns but each opportunity is considered on its merits and dependent upon competition analysis. Would need a unit of 2,000 to 2,500 sq.ft.	Blaina is unlikely due to existing offering from Co-op and Premier.	Yes	Yes	Yes	Yes	Unlikely
Tesco Express	Awaiting Feedback						

Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	**Would you consider units in any of the 5 towns? If so, which and what is the requirement?**	**If not, why not?**					
Sainsburys Convenience	Not meet their demographics at present. Looked at Woolworths in Ebbw Vale and turned it down, However demand to take 1000 across the country in next few years so will have to consider less desirable opportunities. Therefore if 3500/4000 sq.ft became available in next couple of years would need to consider.		Future	Future	Future	Future	No
Edinburgh Woollen Mill	In Festival Park but not a great success. However landlord gave them a good deal to stay last year and new landlord is working hard on the factory outlet scheme to make it a destination.	The socio demographics of the region and core customer penetration are far too low in Blaenau Gwent. They require 30% ccp whilst Ebbw Vale, Tredegar and Abertillery currently only have 1%ccp.	No	No	No	No	No
Store Twenty One	In Ebbw Vale and Brynmawr. Would take Abertillery and Tredegar. Want between 3000 and 5000sqft ground floor sales and 1500sqft back up. In prime position but difficulty finding size.		In	Yes	Yes	Yes	No
Sports Direct	In Festival Park and also Merthyr. No other requirements	Not sufficient population to sustain another store in the region. Would not want to relocate from Festival park to town centre as trades satisfactorily at present time	No (in Festival Park)	No	No	No	No
Bargain Booze	In Tredegar and Rassau. They are led by the franchisee coming to them and wanting to become a Bargain Booze store. Cannot be any closer than 1.5 miles from another store	Ebbw Vale too close to Rassau store so franchisee is protected	No	In	Yes	Yes	Yes

TREDEGAR - OCCUPIER REPORT

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1. Purpose

The decline of Blaenau Gwent's town centres has been recognised and identified by Blaenau Gwent County Borough Council's strategic assessment of risks and challenges, and their revitalisation is a priority for the Council.

A number of key strategic regeneration projects are being implemented across their town centres which have a focus on environmental improvements, enhanced visitors infrastructure and the redevelopment of key sites that are close to a number of town centres. In addition to the physical investment taking place, the Council wants to promote the town centres to investors so that there is a co-ordinated approach to physical regeneration and local investment.

The key objectives of this report are therefore:

- To establish an accurate picture of the potential investors that could be attracted to the County Boroughs town centres;
- To target and attract increased retail/mixed use/other investment to the town centres utilising a professional and consistent promotion method; and
- To develop and promote the identified retail hierarchy and complementary roles of our town centres as outlined in the draft deposit BGCBC LDP.

Not a specific task of the Occupier Strategy Report, but linked to the overall project is also the need to develop a Marketing Strategy/Plan which aims to engage and attract both the private sector and members of the public towards the various opportunities within the Town Centres. There is therefore a direct relationship between the Report and the Marketing Strategy/Plan as it provides the current mix of town centre occupiers, potential targeted retailers and investors and finally how the future role and function should be projected to shoppers and to investors. This body of analysis is therefore important to how any town centre brand or marketing strategy is developed and responds to the actual investment opportunities and fulfils the respective role and function of each town.

2. Process & Methodology

In support of preparing a Marketing Strategy for the town, this Occupier Suitability Report sets out the following:

1. Current retail offering within the town;
2. Identifies potential gaps in retail offering in terms of sector and also potential specific retailer identity.

In preparing the Report, the following activities have been undertaken:

- Familiarisation/Information Gathering
    - Detailed site visits to the five town centres;
    - Photographic records of all shop fronts;
    - Obtained occupier data from the current Valuation Office Rating List;
    - Valuation Office information was cross checked with information from site visits; and
    - Categorise occupier lists and input into a database.
- Analysis/Occupier Interviews
    - Analysis of occupiers by sector, category and retailer identity using filters and sorting techniques;
    - Identify retailers with requirements for towns in South Wales and also focusing on towns in Valleys locations;
    - Analysis of other towns to identify retail gaps (Blackwood, Merthyr Tydfil, Abergavenny) as well as detailed analysis of other towns in Blaenau Gwent to identify which retailers are in one town but not others;
    - Direct contact with retailers to establish requirements for towns;
    - Contact with selected stakeholders and investors; and
    - Interviews with a sample of local businesses and business forum representatives.
- Reporting
    - Report on retailer feedback;
    - Review of existing vitality and viability data held by the Council;
    - Analysis of town centre data to identify distinctive clusters;
    - Assessment of the role and function of the town centre;
    - Identify retailers with potential requirements for the town over timescales; now, 2011-2016 and 2016-2020; and
    - The report has also considered the current development opportunities presenting themselves within the town and commented as to potential retailer suitability.

3. Tredegar Town Centre

3.1. Tredegar - Strategic Context

Tredegar is located at the head of the Sirhowy valley in the north western corner of Blaenau Gwent. It has a town population of 3,700[1] (central and west wards) with the wider Tredegar area having a population of 15,057 residents[2]. The town centre is the second largest town centre in terms of floorspace at 226,054 sq.ft[3] in the study area, which is partly due to the presence of Gwent Shopping Centre.

The town centre is accessed from the A4048 which connects the mid valley towns of Blackwood and the A465 Heads of the Valleys. The neighbouring town of Ebbw Vale is linked by the A4047.

The main town centre is contained by the A4048 and the Sirhowy River with the neighbouring residential streets creating the western edge to the shopping area. The main shopping street is Commercial Street which has Gwent Shopping Centre located off it and the main town centre car park. At the southern end of Commercial Street, the shopping area leads into the secondary area of Castle Street and The Circle, on to Bedwellty Park. Lidl supermarket is situated on the edge of the northern side of the town centre with its own off street car park. Bus stops are to the rear of the town centre alongside Gwent Shopping Centre car park. A taxi rank is located within the same car park. Some environmental improvements have taken place in terms of public space with some shops receiving grant support for shop front improvements.

In addition to shops and local services, the town centre has a library with Bedwellty Park and House visitor attraction subject to a major refurbishment through Heritage Lottery Funding. Proposals include the restoration of the House and its conversion into a multi-use facility. This will include offices, workshops and educational space, as well as a café to encourage the local community to use the House for group meetings, social events and lectures. Within the House there will be exhibitions and interpretation panels to help bring the industrial and social history of the site to life for all visitors.

Figure 1: Images of Tredegar Town Centre

Source: Stuart Hogg Property

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[1] 2001 Census
[2] 2001 Census
[3] Stuart Hogg Property / VOA data

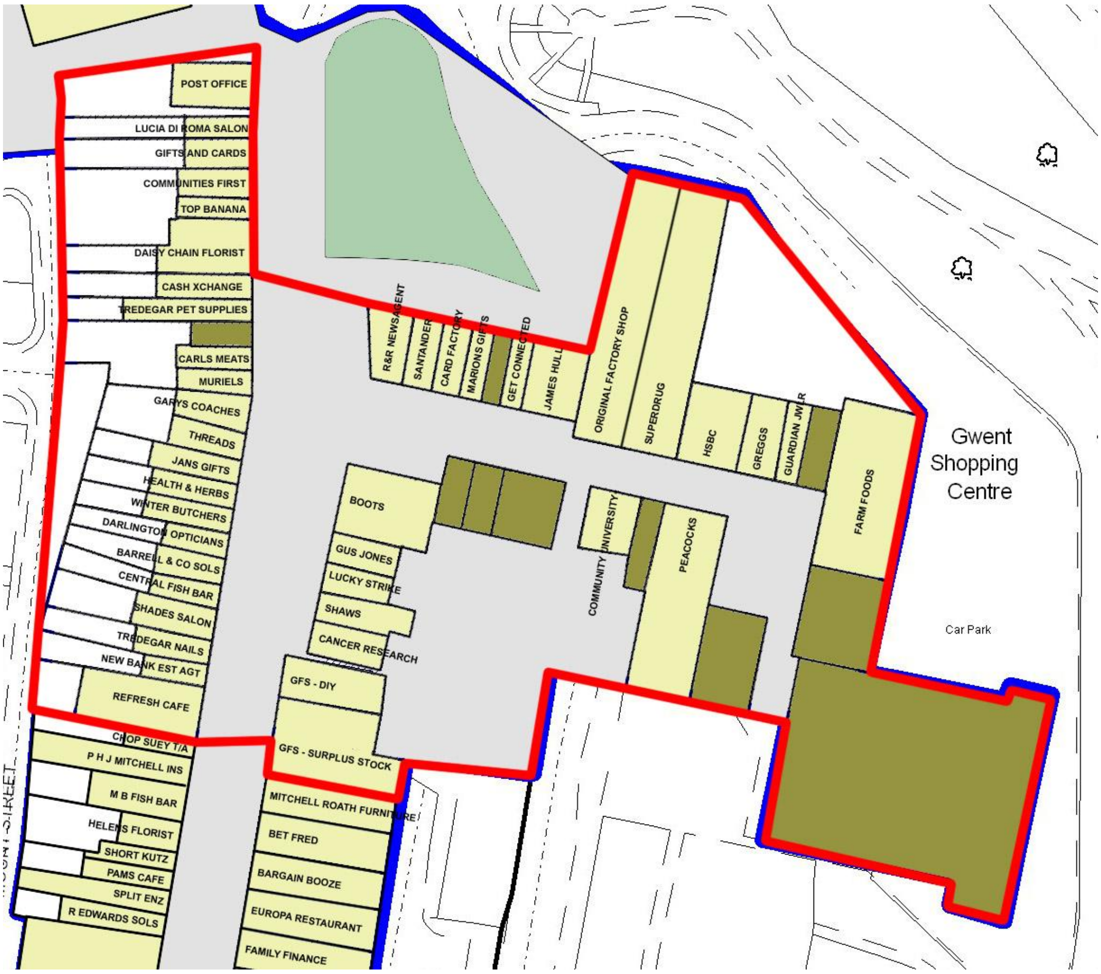
3.2. Headline Statistics

The following table presents the key retail statistics for Tredegar with Figure 2 below showing the draft deposit Local Development Plan Primary Retail Area and the local location of vacant buildings as of 25th January 2011.

Table 1: Tredegar Retail Statistics

Total floor area of retail space	**21,001 sq.m**
Number of retail units	153
52 units in Primary Retail Area	(9,749 sq.m)
101 units outside Primary Retail Area	(11,251 sq.m)
Number of Vacant Units	22 (12 in outside Primary Retail Area and 10 in Primary Retail Area) with a total of 4,059 sq.m which equates to around **19%** of the total retail space. Note that Vacant Aldi unit is 1,605 sq.m

Figure 2: Tredegar – Primary Retail Area (as identified in LDP) showing vacant units as at 25 January 2011 (dark)



Source: Stuart Hogg Property – January 2011

3.3. Vitality and Viability – Key Headlines

The following summary is drawn from existing retail studies[4] that have been provided by Blaenau Gwent County Borough Council and observations from site visits during January 2011:

Shoppers' Attitudes

- CACI data compares Tredegar to centres such as Blackwood and Monmouth in its rural centres classification with it ranked 24th in the Welsh ranking of Rural Centres;
- Tredegar captures 5% of its total annual retail expenditure from its 226,650 residents within its retail catchment;
- In its core catchment, Tredegar retains 18% of its market share with it increasing to 30% as you turn to its primary catchment;
- Clothing and footwear account for 15.7% of the total expenditure, with durables accounting for 12.7% per year; and
- The CACI analysis concludes that Tredegar is under provided for in terms of comparison goods in relation to its catchment population size, and this requires improvement;
- 40% of respondents to a household telephone survey indicate they conduct their main food shop at Morrisons in Ebbw Vale, with 19.2% shopping at the Ebbw Vale Tescos; Asda at Dowlais attracts 11.8% of the main shopping for those that responded;
- 18% of respondents named Lidl and Farmfoods as their local choice for food shopping;
- In terms of locations to purchase non-food items, Cardiff was the most popular at 28.8% with Merthyr Tydfil town centre attracting 22.4% of the non food items; 6.8% of respondents stated that they shop in Tredegar town centre for their non food items;
- 81.6% of all respondents surveyed visit Tredegar for their shopping, with 74% of the 204 people stating that this was due to the closeness and convenience to their home;
- 42.8% of shoppers when asked what would make them visit the area more frequently identified a better choice/range of non-food shops;
- When asked what would improve people's visit to Tredegar, 80% and 69.8% identified a better choice/range of non-food and food shops, respectively;
- An on street survey identified the most popular reason for over a third (39.5%) of respondents' visits to Tredegar town centre was for food and grocery shopping. Non-food shopping was the second largest response, with a third of all respondents (33.2%) stating this as the main purpose of their visit. The third most popular reason is for work and business (10.7%); and
- 71.1% of respondents identified that it was Tredegar's location and convenience was the aspect that was most liked about the area for shopping, leisure/evening activities or services.

Accessibility

Tredegar town centre is physically split into two areas: Commercial Street and Castle Street.

The main shopping street of Commercial Street is flat and from the Gwent Shopping Centre car park easy to access in terms of ramps and generous pedestrian space. The main street is generally easy to get around

[4] CACI Town Centre Health Checks, January 2008

due to parked cars keeping traffic to a safe speed and a general awareness that it is space frequented by shoppers. There is some disabled parking on street with loading provision provided for businesses.

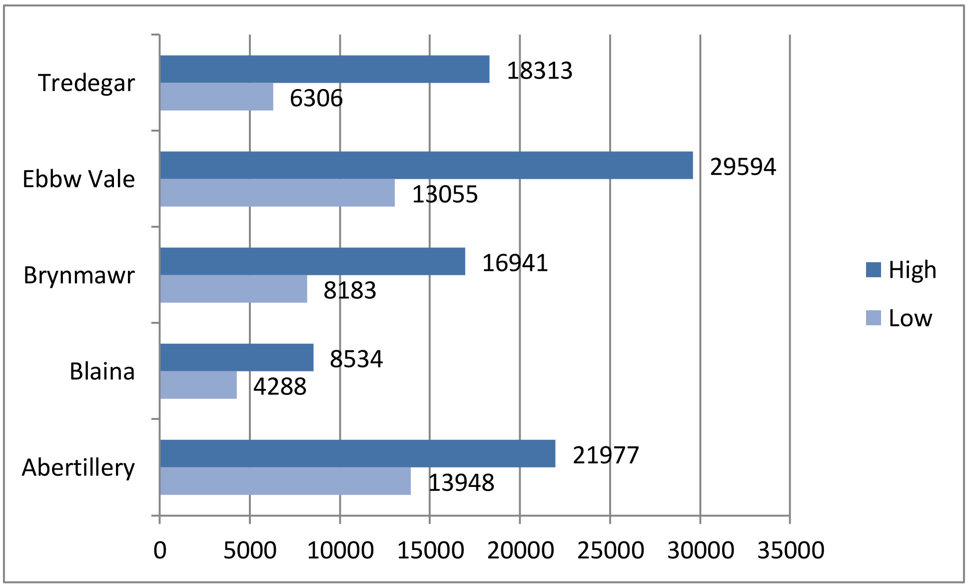
Castle Street is on a hill which is problematic for users in terms of the slope and distance from the main shopping centre. Whilst The Circle area has the potential to be an attractive space that could complement Bedwellty House and Park, the distance from the main shopping area is a major challenge. Public transport and taxis are provided to the rear of Commercial Street on the inner link road next to Gwent Shopping Centre car park.

In conclusion the main shopping street is linear, easy to walk around and generally compact for shoppers and visitors, with the key challenge being how the Castle Street and The Circle area can have a stronger association with the town centre and key attractions.

Footfall

Whilst in retail floor space terms Tredegar is the second largest town centre, its pedestrian footfall does not correspond with it being the third busiest. The compact, flat and linear nature of the town has the right conditions for good pedestrian activity, but this is constrained by a significant number of vacant units in Gwent Shopping Centre as well as a number of units across the town centre that has gradually affected shoppers' confidence in the town centre.

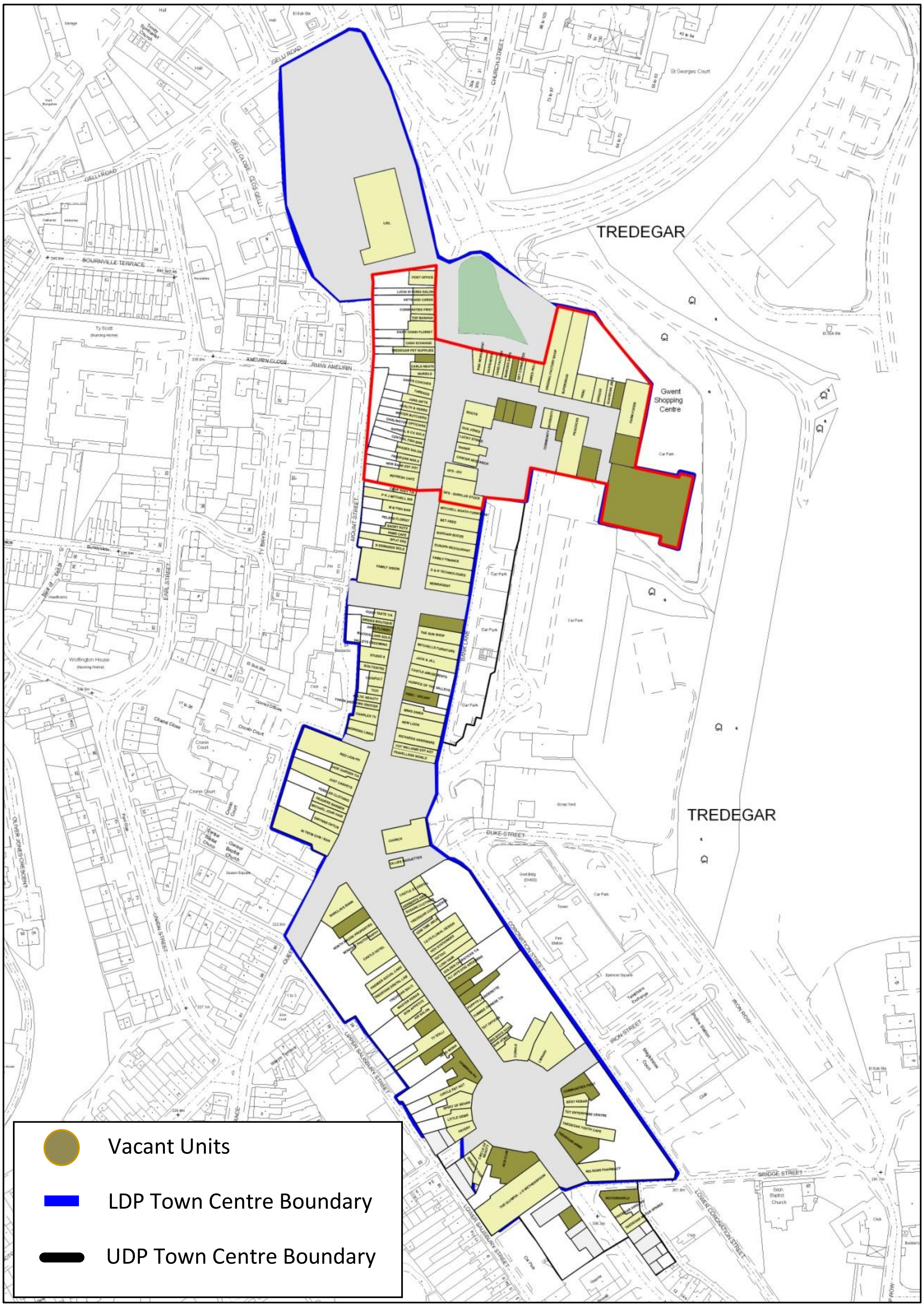
Figure 3: Pedestrian Footfall Figures – Blaenau Gwent Town Centres



Source: Blaenau Gwent Pedestrian Footfall Counts (April 2009 – March 2010)

4. Town Analysis Maps

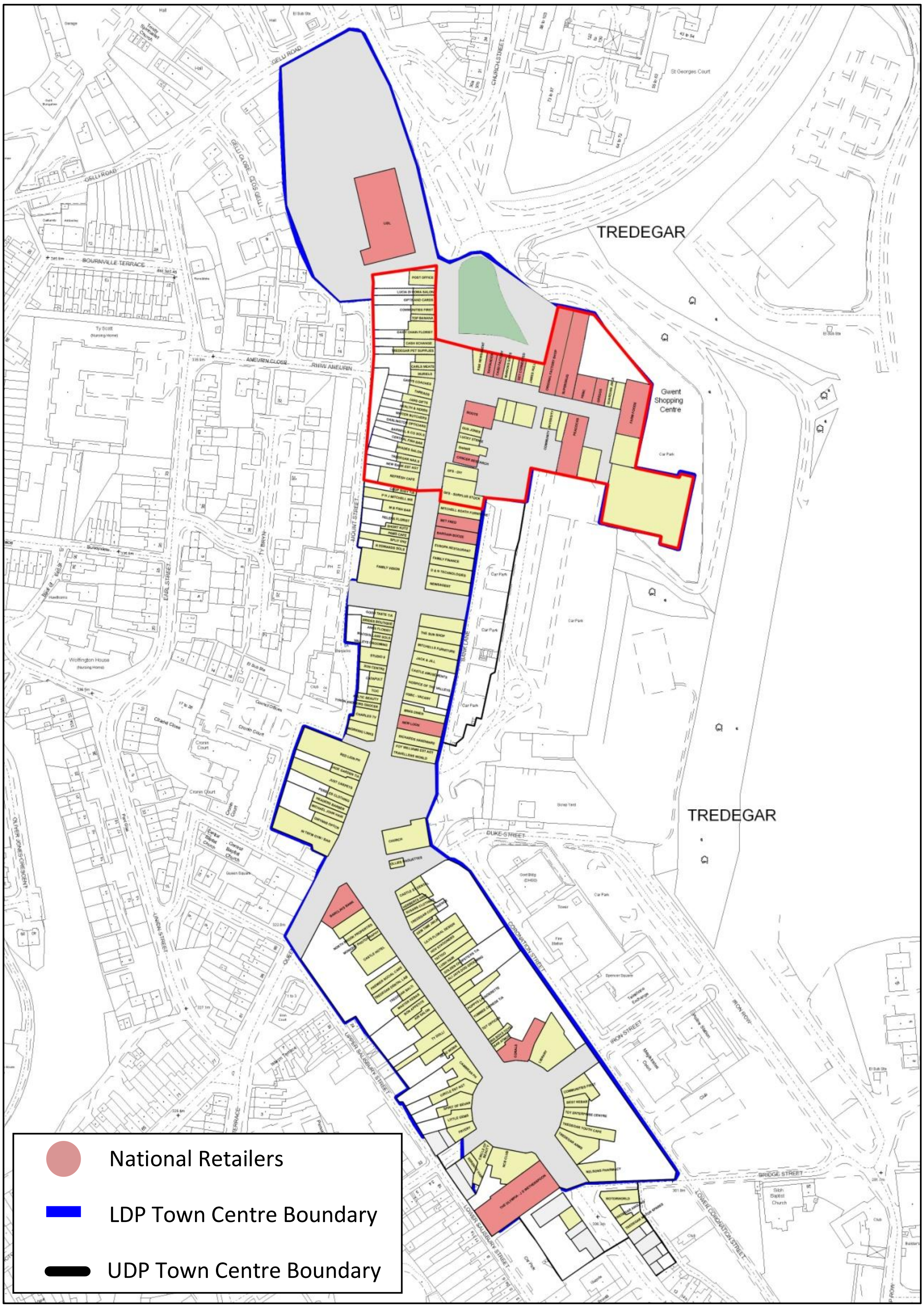
Figure 4: Location of Vacant Units, Tredegar



Source: Stuart Hogg Property, January 2011

The Vacant Unit Analysis Map shows that there is a significant element of Gwent Shopping Centre vacant including the former Aldi store. In addition, there is a cluster of vacant units along Castle Street but relatively few on Commercial Street.

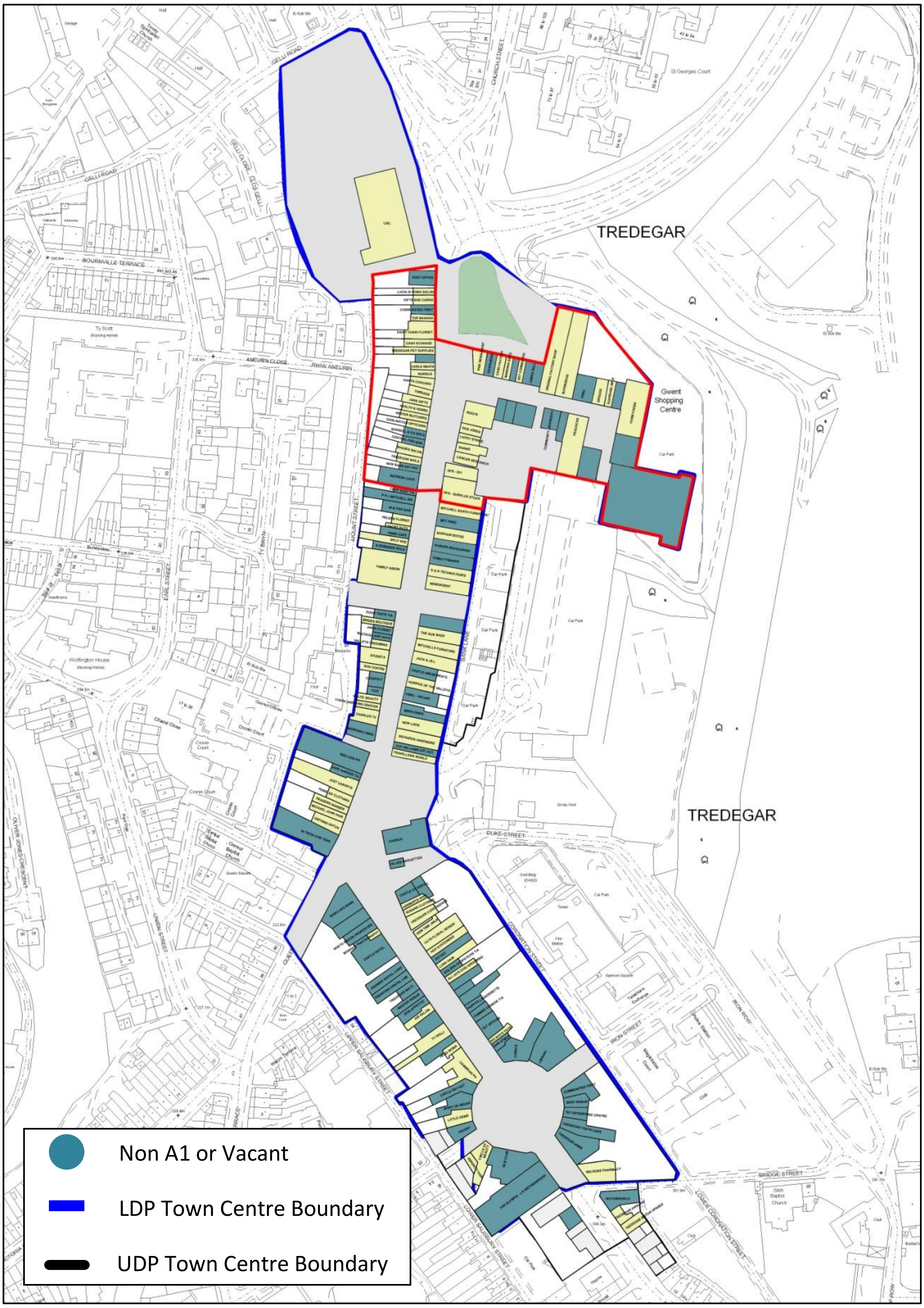
Figure 5: Location of National Retailers, Tredegar



Source: Stuart Hogg Property, January 2011

The National Retailer Analysis Map indicates that there is a cluster of national retailers in the Gwent Shopping Centre. Apart from New Look on Commercial Street, the only other national occupiers outside the core are non A1 users (Barclays, Corals and JD Wetherspoons).

Figure 6: Location of Non A1/Vacant Property, Tredegar



Source: Stuart Hogg Property, January 2011

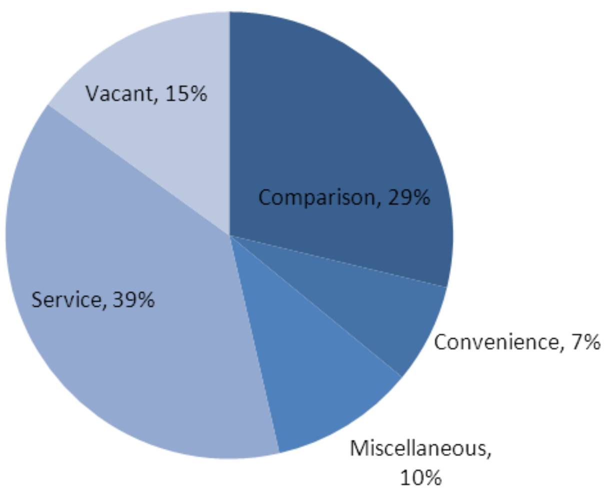
The Non A1 and Vacant Analysis map clearly shows that A1 comparison and convenience retail is focused around the northern end of Commercial Street at the entrance to the Gwent Shopping Centre. The Circle and Castle Street have relatively few A1 uses, which makes it difficult to attract other A1 uses in this location.

4.1. Category Analysis of Occupiers - Tredegar

Table 2: Occupier Analysis – Retail Category - Tredegar

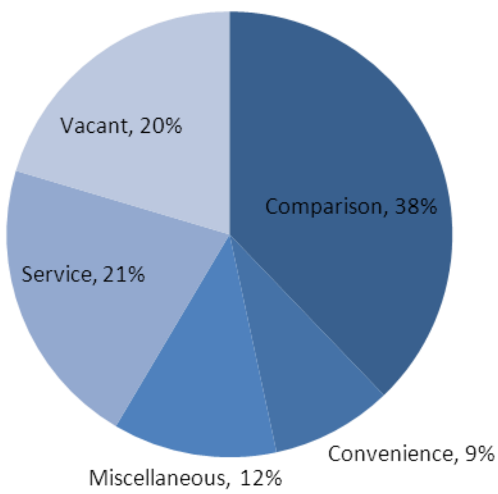
Category	Data	Total
COMPARISON	Count of Occupier	44
	Sum of Total area m2	7,942
CONVENIENCE	Count of Occupier	11
	Sum of Total area m2	1,846
MISCELLANEOUS	Count of Occupier	16
	Sum of Total area m2	2,501
SERVICE	Count of Occupier	59
	Sum of Total area m2	4,430
VACANT	Count of Occupier	23
	Sum of Total area m2	4,282
Total Count of Occupier		**153**
Total Sum of Total area m2		**21,001**

Figure 7: Number of Units



Source: Stuart Hogg Property, January 2011

Figure 8: Percent of Floor Space



Source: Stuart Hogg Property, January 2011

The following table show the breakdown of occupiers (as at January 2011) by specific uses (total ground floor area and number of units). Dominant retail sectors are highlighted in the table.

Table 3: Breakdown of Occupiers by Retail Sector - Tredegar

Sectors	Sum of Total area m2 Total	Count of Occupiers Total
ART / BOOKS / STATIONERY	118.29	1
BABYWEAR	133.79	2
BAKER	60	1
BETTING OFFICE AMUSEMENTS	469.35	4
BRIDAL	41.5	1
BUTCHER	170.68	3
CAFÉ	462.49	6
CHARITY	188.13	2
CHEMIST / OPTICIAN	817.41	5
CTN	261.48	3
DENTAL	283.18	3
ELECTRICAL	1019.33	4
ESTATE AGENT	206.24	3
FINANCIAL SERVICES	759.81	6
FLORIST	223.52	3
FOODSTORE	1784.7	2
FURNITURE	1378.19	4
GENERAL CLOTHING	439.13	1
GIFTS	250.28	4
GREENGROCER	67.53	1
HARDWARE	150	1
HEALTH FOODS	40.2	1
JEWELLER	266.85	3

LAUNDERETTE	35.63	1
LIBRARY	200	1
MISCELLANEOUS	114.77	3
OFF LICENCE	160.33	1
OFFICE	1400.73	12
OTHER	50.6	1
PETS	51.08	1
PUB	1250	4
SALON	981.64	17
SPORTS	80.4	1
TAKEAWAY	733.51	13
TEXTILES	184.43	3
TRAVEL	233.19	2
VACANT	4281.87	23
VARIETY	1452.98	2
WOMENS CLOTHING	397.79	4
Grand Total	**21001.03**	**153**

4.2. Distinctive Clusters

Whilst Tredegar has some significant issues facing its retail offer, there are some notable retailers and businesses that are distinct. These however are lost within the general retail street scene in Tredegar with a lack of consistency in quality, appearance and generally contributing to a whole experience. Hair and Beauty business are well represented with seventeen outlets covering salons, nails and tanning. As with a number of other Blaenau Gwent town centres, hardware and DIY is well represented with Richards of Tredegar and Charles Ltd providing good quality electrical equipment. There is also a good retail offer in terms of carpets and homeware.

There are also a strong collection of cafes with Restaurant Europa, Minis Diner, Refresh, Ty Dolli, Ollies Sandwich Bar and Pam's Café providing choice for locals and visitors. Another strong cluster of retail is fashion and babywear with Jack and Jill's, Little Gems and Threads providing quality babywear/toddlers clothes and accessories and Pebbles and Susan's Clothing targeting boutique ladies fashion. This is also complemented by Bride's Boutique and jewellers like Gem Time and Gus Jones.

Speciality food is well provided for with three butchers in Commercial Street and a green grocers. Some niche shops and services include Tredegar Angling Centre, Big Boys Toys and two dog grooming services. There is a need to develop a strong cohesive cluster of distinctive retail includes arts and crafts and more home and giftware, building on the presence of Jan's and Heads of the Valleys Stationers.

Figure 9: Distinctive Clusters - Tredegar

Source: Miller Research (UK) Ltd

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5. Market Commentary

The market's perception of Tredegar has been of a town in decline. There are few national retailers represented and the town has suffered pressure from competing centres. The high vacancy rate of units within the Gwent Shopping Centre including the vacant Aldi unit reflects poorly on the town and it is clear that retailers have struggled in the centre. However, a number of the vacancies have been as a result of failures of the retail chain and not, necessarily, the location in Tredegar. However, it is true to say that vacant units within the Gwent Shopping Centre have remained vacant for a considerable time, which is, in itself, evidence of a lack of demand. The centre is currently owned by a property company, London & Lothian based in London.

Commercial Street has fared a lot better than the shopping centre in terms of vacancy rates, in part due to the lower occupancy costs (rent, rates and service charge) and a number of owner occupied units. At the time of our inspection, there appeared to be only 3 vacant units along Commercial Street where demand is mainly from independent retailers with a high proportion of non A1 uses being represented. There is, in particular, a high percentage of service uses with a weak comparison offer.

Zone A rents - a measure of value for retail space are currently in the region of £250 per sq.m for prime units - traditionally within the Gwent Shopping Centre. In the best part of Commercial Street, Zone A rents are in the region of £125 to £135 per sq.m.

Castle Street and the Circle are characterised by a very high proportion of non A1 uses. This is also where most of the vacant units in the town are located. It has traditionally been regarded as a tertiary retail location and with the exception of Corals Bookmakers comprises smaller, independent traders. The low occupancy costs in this location make it suitable for small start-up enterprises but the low levels of complementary trade and footfall currently make it difficult to sustain a viable retail business in this location. This will start to change with new investment and renewed activity.

Lettings in Tredegar over the last 5 years include (non-exhaustive):

- Unit 27 Gwent Shopping Centre (Original Factory Shop)
- Unit 26, Gwent Shopping Centre (Santander)
- Unit 25, Gwent Shopping Centre (Card Factory)
- 52 Commercial Street (Gifts & Cards)
- 51 Commercial Street (Communities First)
- 47 Commercial Street (Cash Xchange)
- 41 Commercial Street (Threads)
- 36 Commercial Street (Barrell & Co)
- 32 Commercial Street (Tredegar Nails)
- 31 Commercial Street (New Bank Estate Agents)
- 29-30 Commercial Street (Refresh Cafe)
- 25 Commercial Street (Helens Florists)
- 24B Commercial Street (Short Kutz salon)
- 23 Commercial Street (Split Enz salon)

- 95 Commercial Street (Newsagent Tobacconist)
- 94 Commercial Street (D & N Technology)
- 8/9 Commercial Street (TCIC)
- 1 Commercial Street (Working Links)
- 108 Commercial Street (Foy Williams & Travellers World)

6. Demand

Current / recent national requirements for Tredegar that have been identified include:

Wilkinsons. This requirement is now no longer active. The feedback is that the retailer felt that the town was too small to justify their requirement.

Interviews with agents marketing units suggest that requirements for the town are from independent traders and predominantly for salon use or A3 takeaway. Apart from those requirements identified above, no national or larger regional requirements have been identified for the town.

However, as can be seen from the list of recent lettings, there is evidence of a reasonably active market place in the town although again, the majority of the lettings have been to smaller, independent retailers or national discount retailers.

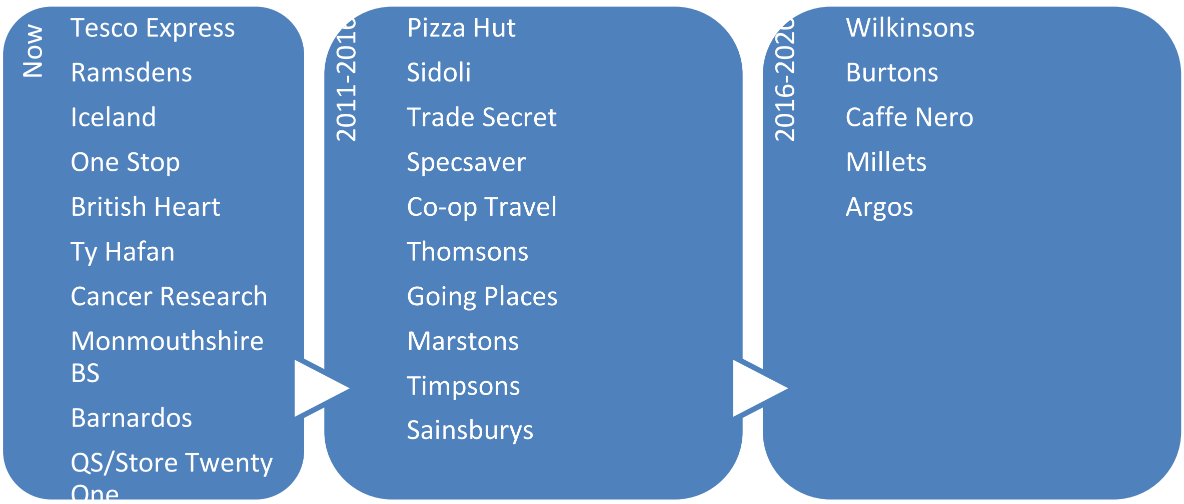
7. Gap Analysis

Retailers / types of retailers that are not represented or under-represented in the town that could be targeted:

- Footwear
- Clothing
- Phone shop - only one currently
- Bakers - only one currently
- Banks
- Sports
- Charity Shops aimed at higher quality chains
- Fashion including men's fashion / sportswear
- Estate Agent
- Delicatessen
- Optician
- Book Shop
- Coffee shop
- DIY Hardware
- Travel agency
- Camping / outdoor
- Motor spares
- Restaurant

Having carried out the gap analysis and retailer consultation, examples of the retailers that could be targeted over the short / medium / longer term would be as follows:

Figure 10: Future Timeline for Targeting Occupiers - Tredegar



stuarthogg property consultants www.stuarthogg.com

MILLER Research Evaluation Consulting

8. Availability

Properties that are currently being actively marketed are as follows:

- Unit 27 Gwent Shopping Centre - ground floor sales of 6,177 sq.ft plus ancillary 8,877 sq.ft (former Aldi) available. Having spoken with agents for Tesco, we understand the owners of the shopping centre are close to agreeing terms with them and also Iceland although the latter has not been formally confirmed by the centre owners.
- Unit 9/10 Gwent Shopping Centre - this vacant unit comprises a ground floor sales area of 1,380 sq.ft plus a basement of 560 sq.ft. The quoting rental is £28,500 per annum and the Rateable Value is £24,250 (£9,918.25 payable 2010/11).
- Unit 7, Former Blockbuster, Gwent Shopping Centre - this unit comprises a ground floor sales area of 64.1 sq.m (690 sq.ft) plus a basement store of 26.8 sq.m (288 sq.ft). The passing rental is £13,000 per annum but incentives are available for a sub-tenant or assignment. Blockbuster's lease expires in April 2015. The Rateable Value is £12,250 (£5,010.25 payable 2010/11).
- Unit 13 Gwent Shopping Centre - ground floor sales of 2,340 sq.ft plus basement 2,431 sq.ft available at a quoting rent of £37,000 pa.
- Unit 15a Gwent Shopping Centre - ground floor sales of 700 sq.ft plus basement 285 sq.ft available at a quoting rent of £14,500 pa.
- 13 Commercial Street - a freehold property let as an investment (Valleys Grooming plus one other tenant) available at £59,950.

There are a significant number of retail units that are vacant outside of the primary retail area but are not being apparently actively marketed.

9. Tredegar – SWOT Analysis

Table 4: SWOT Analysis, Tredegar

Strengths	Weaknesses
Gwent Shopping Centre links well with town centre Availability of parking Diversity of tenants Low rents outside the Gwent Shopping Centre	High vacancy rate in Gwent Shopping Centre Fabric condition of buildings Shutters creating dead frontages Limited spending power Some existing occupiers do not complement the wider quality retail offer, with a high proportion of non A1 uses
Opportunities	**Threats**
Development land adjacent to Gwent Shopping Centre Lettings pending within Gwent Shopping Centre Develop shopping experience Promotion as a low rent location for business start ups Identified properties proposing improvement works within the Conservation area Heritage-led visitor offer - Bedwellty Park Raising quality of properties within the declared conservation area of Castle Street/The Circle	Competition from neighbouring centres Potential for a single large retailer to have adverse effect on smaller independents

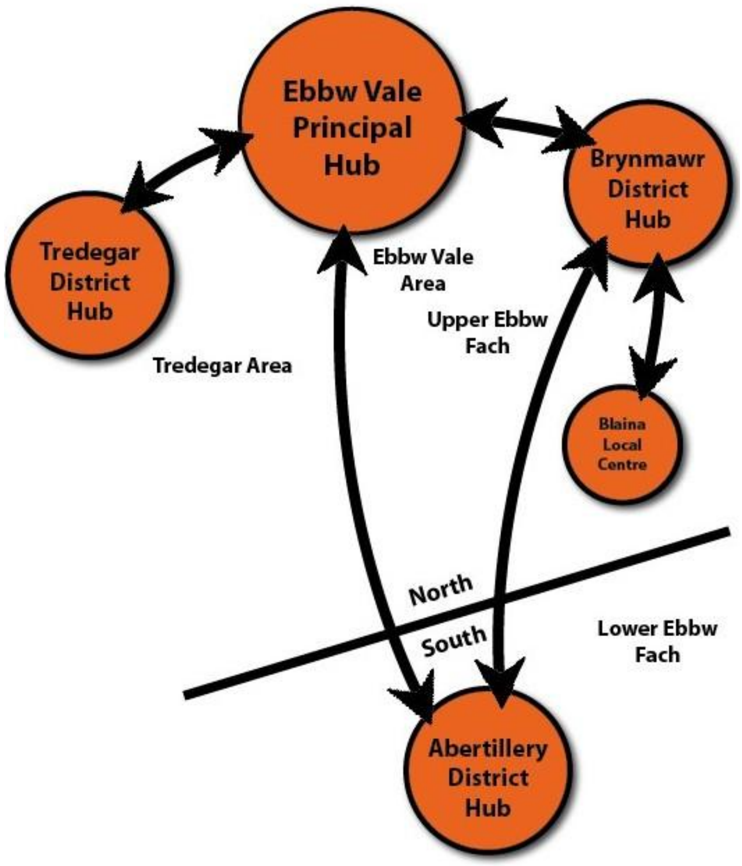
10. Appraisal of Development Opportunities

The Corner Site - The corner site north of the Gwent Shopping Centre has been identified as a development opportunity and has been included in the draft deposit Local Development Plan town centre boundary. This is a prominent site and very visible to visitors to the town. It may present an opportunity to raise the profile of the town at an important gateway entrance by attracting a high quality scheme. For example a family restaurant / family pub use here would encourage visitors to spend more time in the town. It may be possible to attract an occupier such as Marstons, Brewers Fayre, M&B, Pizza Hut for example or potentially a quality regional operator - eg Sidolis or a coffee chain in a small retail pod scheme.

11. Role and Function

The Council has sought through this study to further develop specific and complementary retailing roles and functions for each of the five town centres that can be utilised in the development of the town centre branding and associated marketing material.

Figure 11: Proposed Retail Hierarchy – Role and Function – Draft Deposit Local Development Plan 2011



Tredegar, compared to Ebbw Vale has a tighter hinterland in terms of shoppers and also has an association with Merthyr Tydfil for shopping trips. It therefore serves its immediate area and is rightly identified within the draft deposit Local Development Plan as a district centre.

As in the case of Ebbw Vale, Tredegar tends to be a comparison centre with its convenience floorspace only represented by Lidl and a number of independent retailers, such as the three butchers in Commercial Street. The proximity of Tescos and Morrison in Ebbw Vale and Asda at Dowlais Top does attract food shoppers away from the town centre.

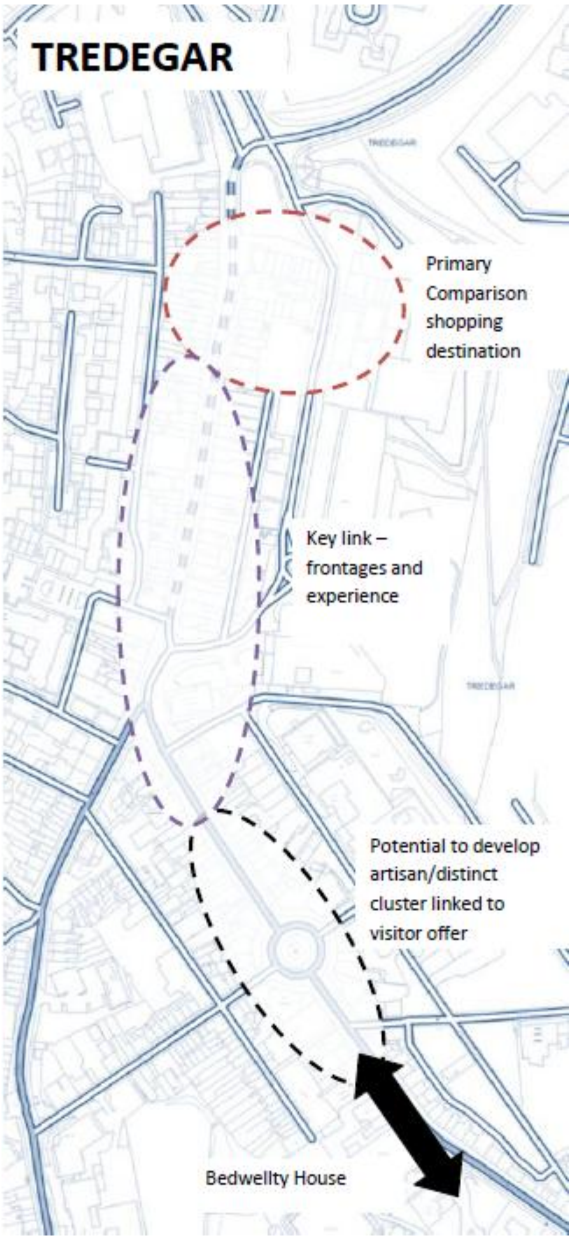
The majority of the town centre is represented by regional and local retailers within Gwent Shopping Centre hosting most of the nationals, albeit with some significant vacancies. The location of a number of High Street banks, a library, health centre and other office/administrative functions re-enforces its role as a district service centre.

Whilst the number of vacant shops are not scattered throughout the town centre, there is a significant cluster within Gwent Shopping Centre and Castle Street which does have an adverse effect on peoples' perception of the town centre as not being a buoyant shopping destination. The need to accommodate more convenience retail space in terms of a medium size format supermarket along with a bakers and delicatessen would attract local shoppers and consolidate the vitality and viability of the town centre.

Tredegar's comparison shopping offer is reasonably well provided for with a good variety and quality, in spite of the town centre's sometimes weak perception. This needs to be built on with missing or under represented retailers in footwear, general clothing, fashion, books and camping/outdoor to be attracted. In addition to day to day shoppers, the town centre has potential to be attractive to visitors with some established destination independent retailers in ladies fashion, babywear, wedding and gift wear. These distinct clusters along with jewelers, hair/beauty and cafes have opportunities for cross marketing and joint promotion.

The visitor opportunities from the renovation works to Bedwellty House and Parkland and the town centre's proximity to Bryn Bach Park and Sirhowy Valley trails are also significant if a comprehensive visitor management approach is adopted. This needs to ensure there is linkage and complementary attractions in the town centre as well as necessary infrastructure such as accommodation, hospitality and event based activities. The role of the Circle and iconic Town Clock needs to be developed in a distinct way that creates linkage with the primary shopping area of Commercial Street.

Figure 12: Analysis Role and Function within Tredegar Town Centre



Source: Miller Research (UK) Ltd

12. Conclusion – Key Recommendations

Tredegar has the opportunity to be reinvigorated as a district town centre and with improvement has the opportunity to retain more local trade and also potentially draw trade from a wider area.

Specific opportunities and issues to address include:

- Reinvigoration of the Gwent Shopping Centre is critical to the future of the town and could provide a good shopping experience that would retain trade in the town and potentially attract trade from a wider area;
- Promotion of the Corner Site as a development opportunity;
- Limiting the number of further non A1 uses in the primary retail area so that a more cohesive range of retail goods and services is presented to shoppers;
- Shutters - discourage external shutters so that the key frontages are attractive during the daytime and in the evening and that the town appears to be open for business;
- Castle Street / The Circle - potentially capable of fostering crafts and artisan type uses;
- The town centre has a distinct and strong cluster of shops, food and drink outlets and other services that has the potential to be packaged into a co-ordinate marketing strategy that will present Tredegar's role and function in a more legible way.

A1 – Retailer Feedback

Retailer Consultation - Blaenau Gwent

Feedback

Feb-11

Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	**Would you consider units in any of the 5 towns? If so, which and what is the requirement?**	**If not, why not?**					
Wilkinsons	Considering Ebbw Vale - requirement is for a unit of around 10,000 sq.ft	Looked at Tredegar but discounted due to size of town and other towns too small.	Yes	No	No	No	No
Greggs	Are in all towns apart from Blaina	Would not consider Blaina as too small	Yes	Yes	Yes	Yes	No
Timpsons	Going into the Tesco store as a kiosk.	Other towns too small. Looked at Tredegar but felt it was covered by neighbouring towns.	Yes	No	No	No	No
Ladbrokes	Currently in all towns but would not consider Tredegar as there was too much competition.	Too much competition - already catered for.	No	No	No	No	No
Burton / Top Shop	No to all towns.	Market too small in all towns.	No	No	No	No	No

Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	**Would you consider units in any of the 5 towns? If so, which and what is the requirement?**	**If not, why not?**					
BHS	No to all towns.	Market too small in all towns.	No	No	No	No	No
Coffee No.1	No to all towns.	Demographics not affluent enough.	No	No	No	No	No
Caffe Nero	No to all towns.	Demographics not affluent enough - towns too small and their targets are larger towns and cities.	No	No	No	No	No
Shaws	No to all towns.	Currently in Tredegar but trading poorly. No appetite for expansion in these locations. Felt that town centres were not performing well.	No	No	No	No	No
Costa	Would consider Ebbw Vale - would need a unit of 1,300 sq.ft plus in a prime location in town.	Ebbw Vale is a possibility but other towns not perceived to be attractive enough at the moment.	Yes	No	No	No	No
New Look	In all towns except Blaina	Too small	In	In	In	In	No
Subway	In Ebbw Vale, but need new franchisee to reopen	Other towns too small and not affluent enough	In	No	No	No	No

Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	**Would you consider units in any of the 5 towns? If so, which and what is the requirement?**	**If not, why not?**					
Marstons	Yes to Tredegar, Ebbw Vale requiring circa 1 acre of land on main arterial routes	Abertillery & Blaina too small	Yes	Yes	In	No	No
Cash Generators	In Ebbw Vale, and no to all other towns	Catchment population too small to justify another branch in the vicinity	In	No	No	No	No
Superdrug	Awaiting feedback			In		In	
Marks & Spencer	Awaiting feedback						
Card Factory	In Ebbw Vale and Tredegar. Would consider trialling Abertillery for a 6/12 month period to see if sufficient demand	Blaina is too small. Unsure on Brynmawr and proximity to Tredegar/Ebbw Vale	In	In	Unsure	Trial	No
Lidl	In Tredegar and no to other towns	Other towns have too small a catchment to get board approval at present. This may change in the next 2 years, but is the reason Brynmawr was rejected.	No	In	No	No	No
Aldi	In Ebbw Vale and recently closed Tredegar.	Insufficient population to justify another store in the vicinity.	In	Closed	No	No	No
One Stop	They would consider all towns but each opportunity is considered on its merits and dependent upon competition analysis. Would need a unit of 2,000 to 2,500 sq.ft.	Blaina is unlikely due to existing offering from Co-op and Premier.	Yes	Yes	Yes	Yes	Unlikely
Tesco Express	Awaiting Feedback						

Retailers			Ebbw Vale	Tredegar	Brynmawr	Abertillery	Blaina
Name of Company	**Would you consider units in any of the 5 towns? If so, which and what is the requirement?**	**If not, why not?**					
Sainsburys Convenience	Not meet their demographics at present. Looked at Woolworths in Ebbw Vale and turned it down, However demand to take 1000 across the country in next few years so will have to consider less desirable opportunities. Therefore if 3500/4000 sq.ft became available in next couple of years would need to consider.		Future	Future	Future	Future	No
Edinburgh Woollen Mill	In Festival Park but not a great success. However landlord gave them a good deal to stay last year and new landlord is working hard on the factory outlet scheme to make it a destination.	The socio demographics of the region and core customer penetration are far too low in Blaenau Gwent. They require 30% ccp whilst Ebbw Vale, Tredegar and Abertillery currently only have 1%ccp.	No	No	No	No	No
Store Twenty One	In Ebbw Vale and Brynmawr. Would take Abertillery and Tredegar. Want between 3000 and 5000sqft ground floor sales and 1500sqft back up. In prime position but difficulty finding size.		In	Yes	Yes	Yes	No
Sports Direct	In Festival Park and also Merthyr. No other requirements	Not sufficient population to sustain another store in the region. Would not want to relocate from Festival park to town centre as trades satisfactorily at present time	No (in Festival Park)	No	No	No	No
Bargain Booze	In Tredegar and Rassau. They are led by the franchisee coming to them and wanting to become a Bargain Booze store. Cannot be any closer than 1.5 miles from another store	Ebbw Vale too close to Rassau store so franchisee is protected	No	In	Yes	Yes	Yes

Appendix 3

Hot Food Takeaways & Public Houses in Town Centres

Supplementary Planning Guidance Note 9

Blaenau Gwent County Borough Council

Unitary Development Plan

September 2008

Contents

Blaenau Gwent County Borough Council

Supplementary Planning Guidance

HOT FOOD TAKEAWAYS AND PUBLIC HOUSES IN TOWN CENTRES

1.0 INTRODUCTION

1.1 The purpose of this Supplementary Planning Guidance (SPG) is to expand upon the Council's existing planning policy on food and drink uses contained within the adopted Blaenau Gwent Unitary Development Plan. It will outline how the Council will treat planning applications for hot food takeaway establishments and public houses in town centres and the specific policy issues which will be considered in the determination of such applications.

1.2 Following adoption by the Council, this SPG will be a material consideration in the determination of all planning applications for hot food takeaway establishments and public houses in the town centres, including applications for renewal of consents.

2.0 BACKGROUND

2.1 Blaenau Gwent County Borough Council, as the Local Planning Authority receive numerous planning applications each year to build new and change the use of buildings and retail units to hot food takeaway establishments and public houses in the town centres. In recent years, there has been a significant increase in the number of hot food takeaway establishments and public houses within the town centres. The increase in the number of people using these facilities has led to concern being expressed by local residents, local businesses and others, in terms of their impact on both the character of the area, vitality of the shopping areas and residential amenity. However, food and drink uses are considered to be more appropriately located in town centres, rather than outside as they add to the vitality of the town centres, providing diversity and support to the daytime retail and evening time leisure economies.

2.2 In response to this, research has been carried out to look at how the balance of uses in the town centres has changed, what effect this has had and whether specific planning guidance is required to regulate new build and further proposed changes of retail units and buildings to hot food takeaway establishments and public houses.

2.3 This has led to the production of this guidance, which provides a detailed planning policy framework in which future decisions on individual applications can be made. The overall aim of the guidance is to ensure that an appropriate balance of food and drink businesses with other uses is retained, to support the retail function and to protect residential amenity.

2.4 For the purpose of this SPG 'Hot Food Takeaway' establishments are defined as any use falling within the Use Class A3 of the Town and Country Planning (Use Classes Order) 1987 where the primary purpose of the business is the sale of hot food for consumption off the premises. Table 1 below gives an indication of the uses which are included and excluded from this definition and which are covered by this SPG.

Specific Use included in this SPG	**Specific use excluded from the SPG**
Chinese / Indian / Other Takeaways	Restaurants/ Bistros
Kebab House	Coffee Shop
Fish and Chip Shop	Night Clubs
Pizzeria	Café (predominantly day-time opening)
Drive-Through Premises	
Public Houses	
Wine Bars	

Table 1: Examples of Specific A3 uses included and excluded from this Supplementary Planning Guidance Note

2.5 This SPG takes into account the imminent changes that are expected to the Use Class Order, where separate use classes will be created for restaurants and cafes, drinking establishments and hot food takeaways.

2.6 The Council would urge anyone seeking to submit an application for a hot food takeaway establishment or a public house within the town centre to read this SPG and to contact the Local Planning Authority (see Appendix B for contact details) in advance of submitting an application to discuss the issues which are raised in this document on a site specific basis.

3.0 THE POLICY CONTEXT

3.1 This note has been prepared in accordance with guidance contained in Planning Policy Wales, Technical Advice Notes and the adopted Blaenau Gwent Unitary Development Plan.

National Planning Policy

3.2 National Planning policy (as contained in *Planning Policy Wales 2002 and amended by the Ministerial Interim Planning Policy Statement 02/2005: Planning for Retailing and Town Centres*) seeks to:

- "promote established town and district centres as the most appropriate locations for retailing, leisure and for other functions complementary to it"; and
- "enhance the vitality, attractiveness and viability of town, district, local and village centres.

3.3 Paragraph 10.1.3 of Planning Policy Wales (as amended) states that:

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

3.4 However, paragraph 10 of Technical Advice Note 4: *Retailing and Town Centres* states that:

“Changes of use can create concentrations of single uses, such as restaurants and takeaway food outlets, where cumulative effects can cause local problems. Such proposals should be assessed against development plan policies on their contribution to diversification and on the cumulative effects on matters such as parking and local residential amenity.”

Local Planning Policy

3.5 Policy S6 (see Appendix A) of the adopted Unitary Development Plan sets out particular criteria by which individual proposals for food and drink establishments within the defined urban area will be assessed. The broad aims of the policy are:

- To help maintain the viability and vitality of the designated central shopping areas as outlined in the Unitary Development Plan proposal maps; and

- Locate hot food takeaways where they would not have a detrimental impact on the highway network, highway safety and ensuring acceptable amenity standards to residents of nearby properties.

4.0 THE NEED FOR PLANNING PERMISSION

4.1 The Town and Country Planning (Use Classes) Order 1987 subdivides different types of use classes into separate classes of use. In general, any proposal to change the use of premises from one use class to another class requires planning permission.

4.2 Part A of the Use Classes Order covers three classes of use which are generally found in shopping areas:

A1 Shops
A2 Financial and Professional Services
A3 Food and Drink

4.3 Use Class A3 broadly covers the following uses: restaurants, cafes, snack bars, wine bars, public houses and hot food takeaways. Planning permission is not required to change the use of premises already in the use class to a hot food takeaway, e.g. fish and chips to one selling a different type of hot food, e.g. Chinese takeaway. However, in some cases, conditions attached to a planning permission may restrict the particular uses which are allowed at a property. For example, a restaurant or a café may be prevented from operating as a hot food takeaway, wine bar or public house, if the additional noise and nuisance likely to arise from such uses would be unacceptable to nearby residents.

4.4 However, if it is intended to use the property for a food and drink business and is currently not used for that purpose then a change of use planning application will be required.

4.5 In addition to permission to change the use of the premises, planning permission will be required for:

- Extensions to a property and may be required for external alterations (including shop front alterations and external shutters. Further guidance is available on what is acceptable in Supplementary Planning Guidance Note 1 – Design Guidance for Shopfronts, Abertillery Design Guidance and policy S7 of the adopted Unitary Development Plan – see Appendix A.)
- New or altered signs may require advertisement consent; and
- Special consent may be necessary for certain proposals affecting listed buildings or buildings in conservation areas.

5.0 APPROPRIATE LOCATIONS FOR FOOD AND DRINK USES

5.1 Proposals to locate a food and drink use in a town centre is generally acceptable and encouraged, subject to them not leading to a concentration of non A1 uses within the town centre (see Appendix C-G for town centre boundaries as defined in the Unitary Development Plan). However, the number and concentration of such uses should not detract from the overall character and function of the centres. Particular care needs to be exercised in locating such uses in or near primarily residential areas, including residential accommodation above or adjacent to the proposal.

The number and concentration of uses

5.2 Generally, in Blaenau Gwent, food and drink uses are dispersed. However, there are pockets where there is a concentration of such uses, including premises such as public houses and hot food takeaway establishments, which have a distinctive character and late night opening. In order to minimise the impact on vitality and viability, concentrations or clusters of hot food takeaways and public houses should be avoided as they often have an adverse impact on the character of the area.

In order to minimise the impact on vitality and viability, no more than 3 hot food takeaways and/ or public houses should be located within close proximity to each other in the town centres*. Advice should be sought from the architectural liaison officer and the planning policy team (see Appendix B for contact details) and each application will be assessed in terms of the crime and police incident records and the town centre land use survey.

*****Close proximity will be defined on a case-by-case basis due to the difference in the topography and layout of the town centres.

As far as the town centres are concerned, the number of hot food takeaway establishments should be equal to or no greater than 7.0% of the total number of retail units/ buildings in the town centre and the number of public houses should be equal to or no greater than 4.0% of the total number of retail units/ buildings in the town centre.

5.3 A working group comprising of Planning Policy, Planning Control, Regeneration, Environmental Health and the Police was established to create the thresholds for hot food takeaways and public houses. The thresholds are based on local knowledge and extensive survey information undertaken by the Police and Planning Policy. The survey undertaken by the Police analysed A3 premises compared with locations of anti social behaviour.

5.4 A town centre land use survey was conducted in April 2008. The table below shows the current position (April2008) in terms of the number of hot food takeaways and public houses occupying the retail units and buildings in the town centres.

Town Centre	Number of Ground Floor Units	A3 Uses	Hot Food Takeaway Establishments	Public Houses
Abertillery	162	23 (14.2%)	12 (7.4%)	7 (4.3%)
Blaina	66	13 (19.7%)	6 (9.1%)	7 (10.6%)
Brynmawr	155	20 (12.9%)	11 (7.1%)	7(4.5%)
Ebbw Vale	140	20 (14.3%)	12 (8.6%)	4 (2.9%)
Tredegar	173	25 (14.5%)	12 (6.9%)	6 (3.5%)

Table 2: The current position (April 2008) in terms of the number of hot food takeaways and public houses in the town centres

5.5 Applications relating to a combination of A3 uses, for instance the mixed use of public houses and restaurants or restaurants and takeaway use will be considered on their own merits, and where appropriate, the guidelines contained within this SPG will be applied. Where an A3 use is ancillary to the primary use of the proposal this too will also be considered on a case-by-case basis and if necessary, the guidelines contained within this SPG will be applied.

Ground Floor Land Use Survey

5.6 One of the products of the research has been a survey of the ground floor uses along the shopping frontages of the five town centres of Abertillery, Blaina, Brynmawr, Ebbw Vale and Tredegar. This in itself will assist with the consideration of future proposals in the town centres. However developers will be required to carry out an up to date survey of the ground floor uses of the town centre at the time of the application. The Planning Policy Team will assist where necessary (see Appendix B for contact details).

6.0 DETAILED GUIDELINES

6.1 This section provides detailed guidance on other considerations against which all planning applications for food and drink establishments are assessed. The relative importance attached to these factors varies according to the precise nature and location of the proposal. It is therefore important that applicants provide as much detail as possible about their proposals, especially in relation to the requirements outlined in the following section of the guidelines.

6.2 The other main considerations in relation to hot food takeaway establishments and public houses are summarised below:
- Highway matters;
- Smells / Discharge of fumes;
- Litter;
- Noise and disturbance;
- Hours of opening; and
- Crime and Disorder (section 17 considerations) / Anti-social behaviour.

Highway Matters

6.3 The effect, which a proposed use is likely to have on Highway Matters, is an important consideration. Planning permission is unlikely to be granted where increased traffic flows would cause or aggravate congestion or otherwise affect highway safety. Concurrently, pedestrian access must be safe and convenient to all highway users and not be prejudiced by any such proposal.

6.4 A feature of hot-food takeaways is their tendency to generate short-term on-street car parking, directly outside the premises and on adjacent side streets. This can cause obstruction on main roads and inconvenience to local residents, especially in the evenings when residential areas are fully parked. Proposals, which might encourage short-stay car parking near to junctions, traffic lights, pedestrian crossings, bus stops and double yellow lines, are likely to be unacceptable. It follows therefore that they may be best located on secondary roads or on sites not fronting directly onto the highway. Policy T4 (see Appendix A) of the adopted Unitary Development Plan requires that new development be adequately served from the existing highway network, if it cannot the scheme should be designed, to ensure that highway safety will not be prejudiced; and environmental harm is avoided.

6.5 Public Houses on the other hand, generate longer-term parking requirements, and applicants must show that adequate arrangements exist for customer and staff parking, either on site where appropriate or in the vicinity of the proposed site within established shopping areas. If an area is already congested with parking in the evening, the proposal may increase this problem to an unacceptable degree.

Smells and Discharge of Fumes

6.6 Smells and smoke resulting from the preparation and cooking of hot food can cause nuisance to nearby residents. Problems relating to smells should be mitigated by the installation of suitably designed extraction systems. The actual design of the extraction system will vary from premises to premises, but most should be located to the rear of the property. Modern equipment, combined with high-level ventilation is adequate to reduce smell to prevent nuisance at any sensitive location. Advice on the design, suitability and installation of the extraction system should be sought from Environmental Health (see Appendix B for contact details).

Litter

6.7 No matter how careful the owner of the hot food take-away, there is a tendency to generate litter, resulting in nuisance to the nearby residents, as well as the area looking unsightly. Where appropriate, the applicant may be required to provide a litterbin(s) outside the take-away premises as part of a condition of the planning permission.

6.8 Proposals should include adequate facilities on the premises for the storage of refuse generated by the business. Refuse bags or receptacles should not be left outside the premises or nearby streets (except for collection purposes) as this can attract rodents and create a public health hazard. Suitable access must be provided for the collection of refuse.

Noise Disturbance

6.9 The proximity of a proposal to residential premises is also important because of the nuisance which can be caused to residents by noise and increased activity associated with customers and their cars or taxis arriving and leaving premises. In general, proposals are unlikely to be acceptable where residents live immediately above or next-door. However, should planning permission be granted under such circumstances, applicants will need to demonstrate the provision of satisfactory noise insulation of all equipment and soundproofing between floors or walls before the use commences.

Hours of Opening

6.10 Most businesses usually operate on a 9:00am-5:30pm basis, for example a coffee shop located in a town centre. However, premises wishing to provide hot food or drink between 11.00 pm and 5.00 am require a premises licence issued in accordance with the Licensing Act 2003. The types of premises that may require a licence would include hot food takeaways, public houses, night-clubs etc. An application for a premises licence must be submitted to the Council's licensing section (see Appendix B for contact details) and if, no objections are received, a licence will be granted for an indefinite period. If objections are received, the Council's Licensing Committee would decide if a licence can be granted and on what terms. Opening for other uses may also be subject to environmental health and other legislation. All hours of opening in Blaenau Gwent are controlled by the licensing regime.

Crime & Disorder / Anti-social Behaviour

6.11 Section 17 of the Crime and Disorder Act 1988 imposes a statutory duty on local and police authorities to consider the impact that their daily functions and services will have on crime and disorder. The aim is to anticipate the likely consequences on crime of decisions and look to ensure that any negative impact is avoided and positive outcomes are promoted. This guidance has been prepared in consultation with the police authority.

6.12 A3 uses by their very nature attract large numbers of people. Statistics show that where there is a gathering of people during the evenings/nights there tends to be instances of Crime & Disorder/ Anti-social behaviour. Concentrations of A3 uses in a particular area exacerbate the problem, particularly when hot food takeaways are situated in close proximity to licensed premises such as public houses. These factors and figures for Crime & Disorder / Anti-social behaviour must be taken into account when an application is made. Blaenau Gwent has a formal protocol with Gwent Police. They will be consulted on every application for an A3 use. The view of the police will be key to determining every planning application for uses covered in this SPG.

7.0 OTHER LEGISLATION

7.1 Proposals will also require any approvals under other legislation e.g. environmental protection, licensing and building regulations. Applicants are responsible for compliance with these requirements.

8.0 MONITORING AND REVIEW

8.1 The Council will need to ensure that the guidelines set out in this document continue to be relevant, and to do this the SPG will be kept under review through annual land use retail surveys in the town centres and monthly retail take up surveys. In this way, it will be possible for the Council to ensure that the SPG remains effective as a land-use planning document.

APPENDIX A: RELEVANT POLICIES OF THE ADOPTED BLAENAU GWENT UNITARY DEVELOPMENT PLAN

S6 FOOD AND DRINK

WITHIN THE DEFINED URBAN AREA, FOOD AND DRINK ESTABLISHMENTS WILL ONLY BE PERMITTED WHERE:

(A) THEY WOULD NOT BE DETRIMENTAL TO THE AMENITIES OF OCCUPANTS OF NEIGHBOURING RESIDENTIAL PROPERTIES; AND

(B) THERE IS NO DETRIMENTAL IMPACT ON THE HIGHWAY NETWORK OR HIGHWAY SAFETY; AND

(C) THE PROPOSAL DOES NOT HARM THE VITALITY, VIABILITY AND RETAIL MIX OF THE AREA AS A RESULT OF A PROLIFERATION OF THIS TYPE OF USE.

S7 SHOP FRONT ALTERATIONS

ALTERATIONS TO SHOP FRONTS WILL ONLY BE PERMITTED WHERE:

(A) EXISTING VICTORIAN, EDWARDIAN AND OTHER SHOPFRONTS OF QUALITY AND HISTORIC VALUE ARE RETAINED OR RESTORED;

(B) THE STYLE AND DESIGN OF NEW AND REPLACEMENT SHOPFRONTS ARE COMPATIBLE WITH AND RESPECT THE STYLE OF THE BUILDING INTO WHICH THEY ARE INSERTED AND THE CHARACTER OF THE STREET SCENE IN WHICH THEY ARE SITUATED.

T4 HIGHWAY CONSIDERATIONS IN NEW DEVELOPMENT

NEW DEVELOPMENT WILL BE PERMITTED PROVIDED THAT IT CAN BE ADEQUATELY SERVED FROM THE EXISTING HIGHWAY NETWORK. IF IT CANNOT, THE SCHEME SHOULD BE DESIGNED TO ENSURE THAT:

(A) HIGHWAY SAFETY WILL NOT BE PREJUDICED; AND

(B) ENVIRONMENTAL HARM IS AVOIDED.

APPENDIX B: USEFUL CONTACTS

Planning Control
Blaenau Gwent County Borough Council
Planning Control
Blaina District Office
High Street
Blaina

Tel: (01495) 355555

Planning Policy
Blaenau Gwent County Borough Council
Regeneration Division
Business Resource Centre
Tafarnaubach Industrial Estate
Tredegar
NP22 3AA

Tel: (01495) 355538

Commercial Improvement Grants
Blaenau Gwent County Borough Council
Regeneration Division
Business Resource Centre
Tafarnaubach Industrial Estate
Tredegar
NP22 3AA

Tel: (01495) 355540

Building Control
Blaenau Gwent County Borough Council
Building Control
Blaina District Office
High Street
Blaina

Tel: (01495) 355520

Environmental Health
Blaenau Gwent County Borough Council
Environmental Health
Abertillery Council Offices
Mitre Street
Abertillery

Tel: (01495) 355011

Trading Standards and Licensing
Blaenau Gwent County Borough Council
Trading Standards and Licensing
Brynmawr District Office
Beaufort Street
Brynmawr
NP23 4AG

Tel: (01495) 356138/355050

Community Safety
Blaenau Gwent County Borough Council
Community Safety Partnership
Bedwellty House
The Lodge
Tredegar

Tel: (01495) 356145

Highways and Transportation
Blaenau Gwent County Borough Council
Highways and Transportation
Baldwin House
Victoria Business Park
Ebbw Vale
NP23 8ED

Tel: (01495) 355371

Police Architectural Liaison Officer
Suite 2
Newbridge Police Station
High Street
Newbridge
NP11 4FH

Tel: (01495) 232479

Ebbw Vale and Tredegar Town Centre Manager
Blaenau Gwent County Borough Council
Regeneration Division
Business Resource Centre
Tafarnaubach Industrial Estate
Tredegar
NP22 3AA

Tel: (01495) 355539

Abertillery, Blaina and Brynmawr Town Centre Manager
Blaenau Gwent County Borough Council
Regeneration Division
Business Resource Centre
Tafarnaubach Industrial Estate
Tredegar
NP22 3AA

Tel: (01495) 355565

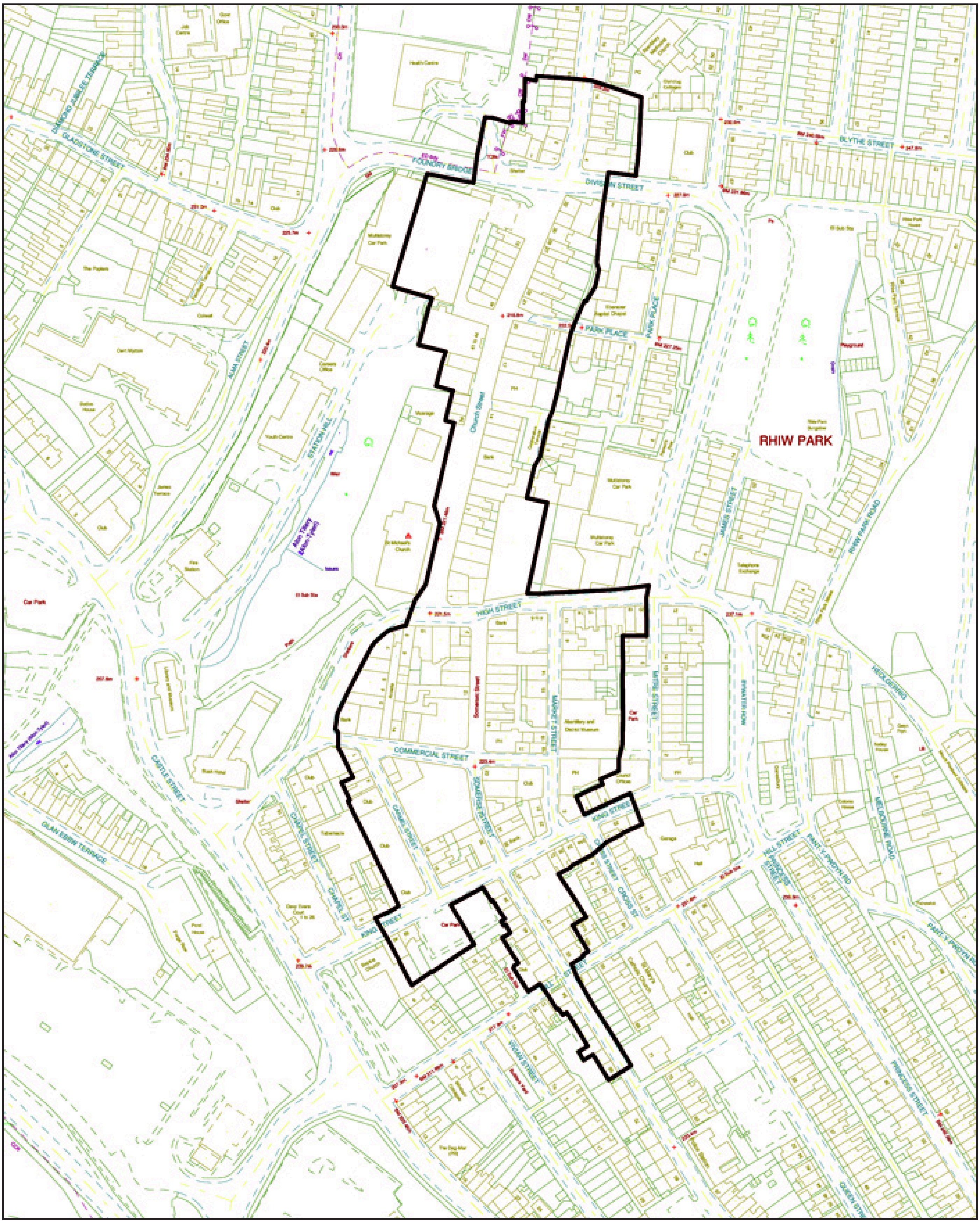
Cyngor Bwrdeisdref Sirol
Blaenau Gwent
County Borough Council

Blaenau Gwent County Borough Council
Environment Directorate
Regeneration Division
Business Resource Centre
Tafarnaubach Industrial Estate
Tredegar, NP22 3AA

G.P.Jones - B.Sc Hons, DipTM, DMS, MRTPI
Chief Regeneration Officer

N

Title : **Appendix C - Abertillery Town Centre** (as defined in the Blaenau Gwent Unitary Development Plan) Scale 1 : 2200



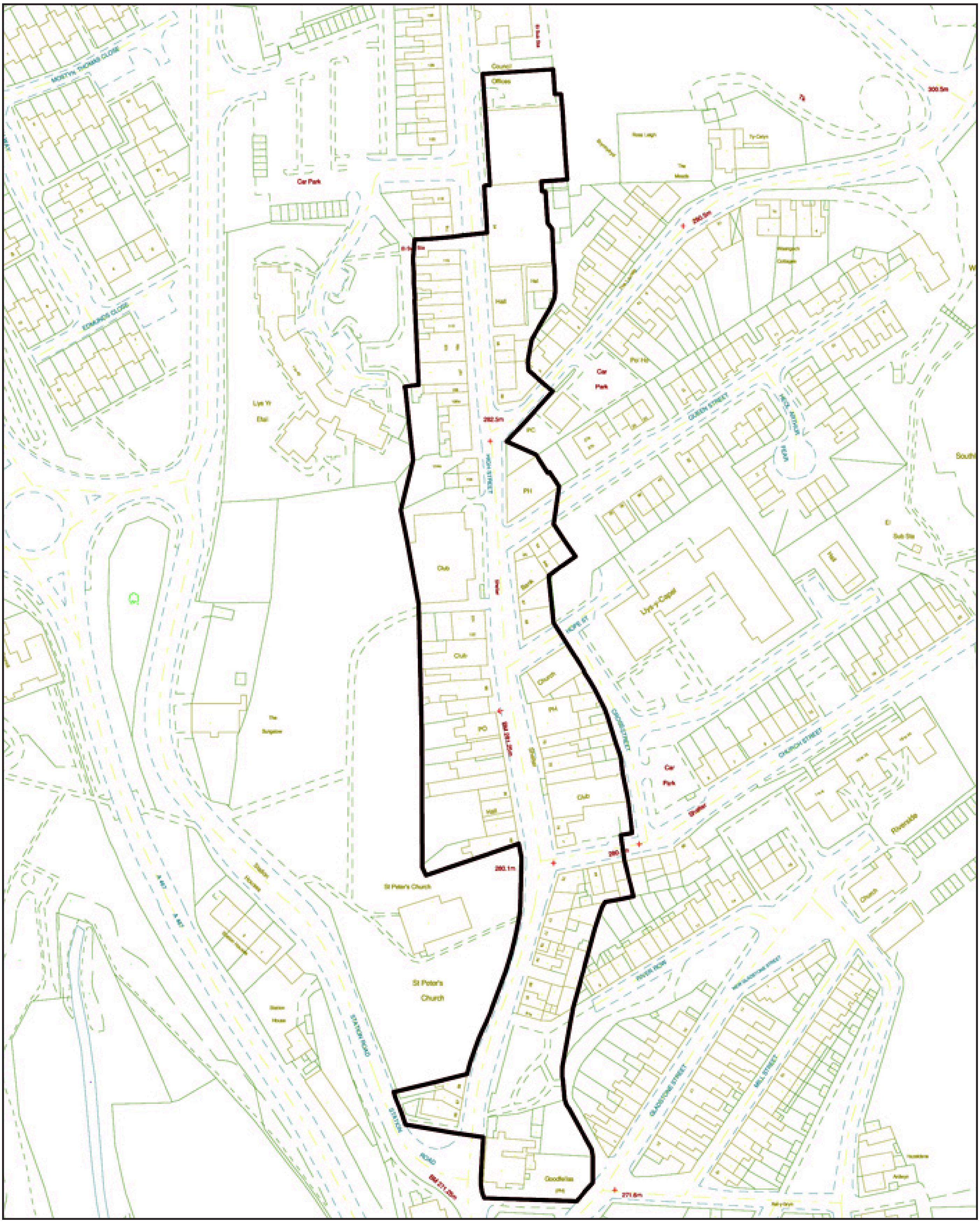
Cyngor Bwrdeisdref Sirol
Blaenau Gwent
County Borough Council

Blaenau Gwent County Borough Council
Environment Directorate
Regeneration Division
Business Resource Centre
Tafarnaubach Industrial Estate
Tredegar, NP22 3AA

G.P.Jones - B.Sc Hons, DipTM, DMS, MRTPI
Chief Regeneration Officer

N

Title : **Appendix D - Blaina Town Centre** (as defined in the Blaenau Gwent Unitary Development Plan) Scale 1 : 2000



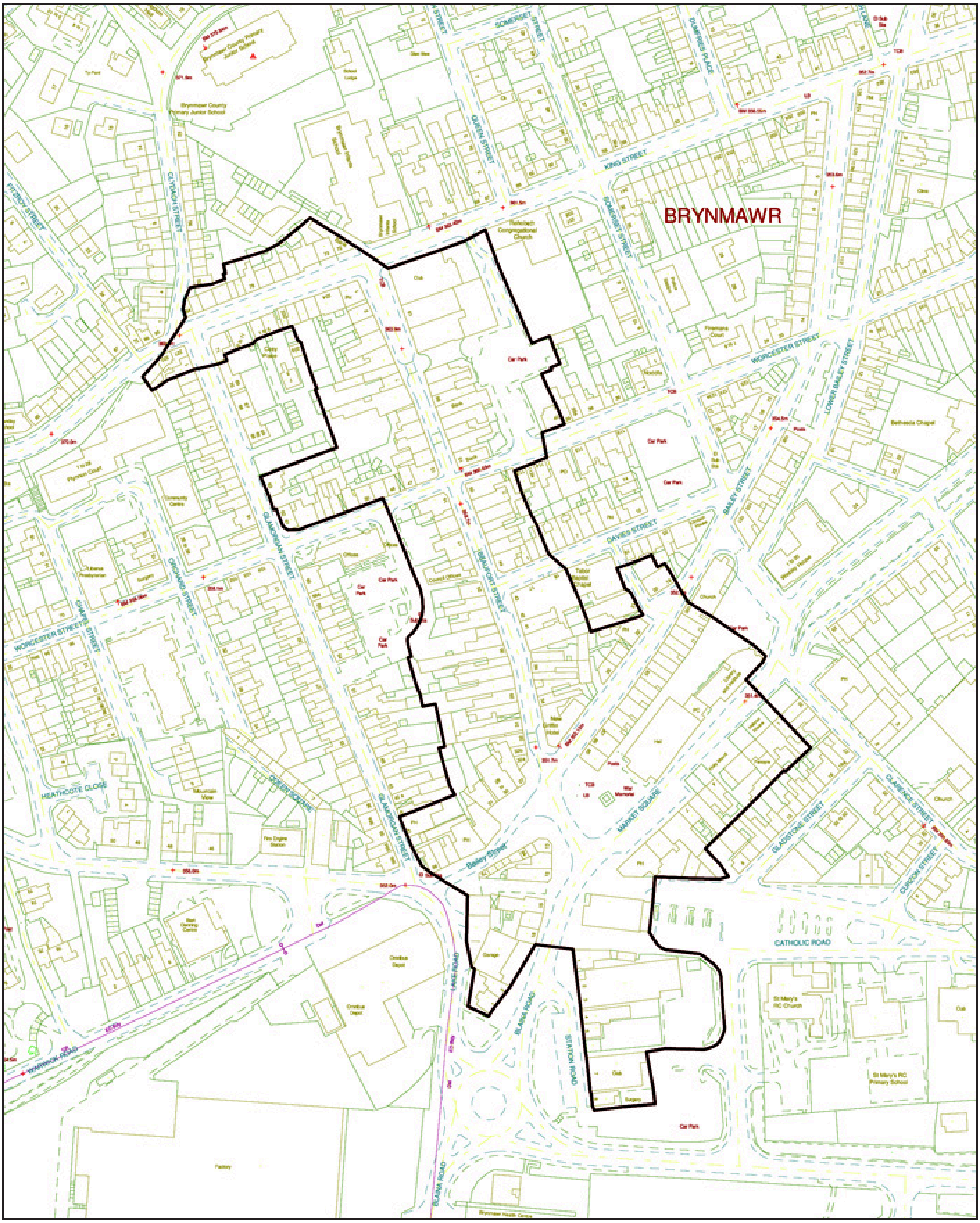
Cyngor Bwrdeisdref Sirol
Blaenau Gwent
County Borough Council

Blaenau Gwent County Borough Council
Environment Directorate
Regeneration Division
Business Resource Centre
Tafarnaubach Industrial Estate
Tredegar, NP22 3AA

G.P.Jones - B.Sc Hons, DipTM, DMS, MRTPI
Chief Regeneration Officer

N

Title : **Appendix E - Brynmawr Town Centre** (as defined in the Blaenau Gwent Unitary Development Plan) Scale 1 : 2200

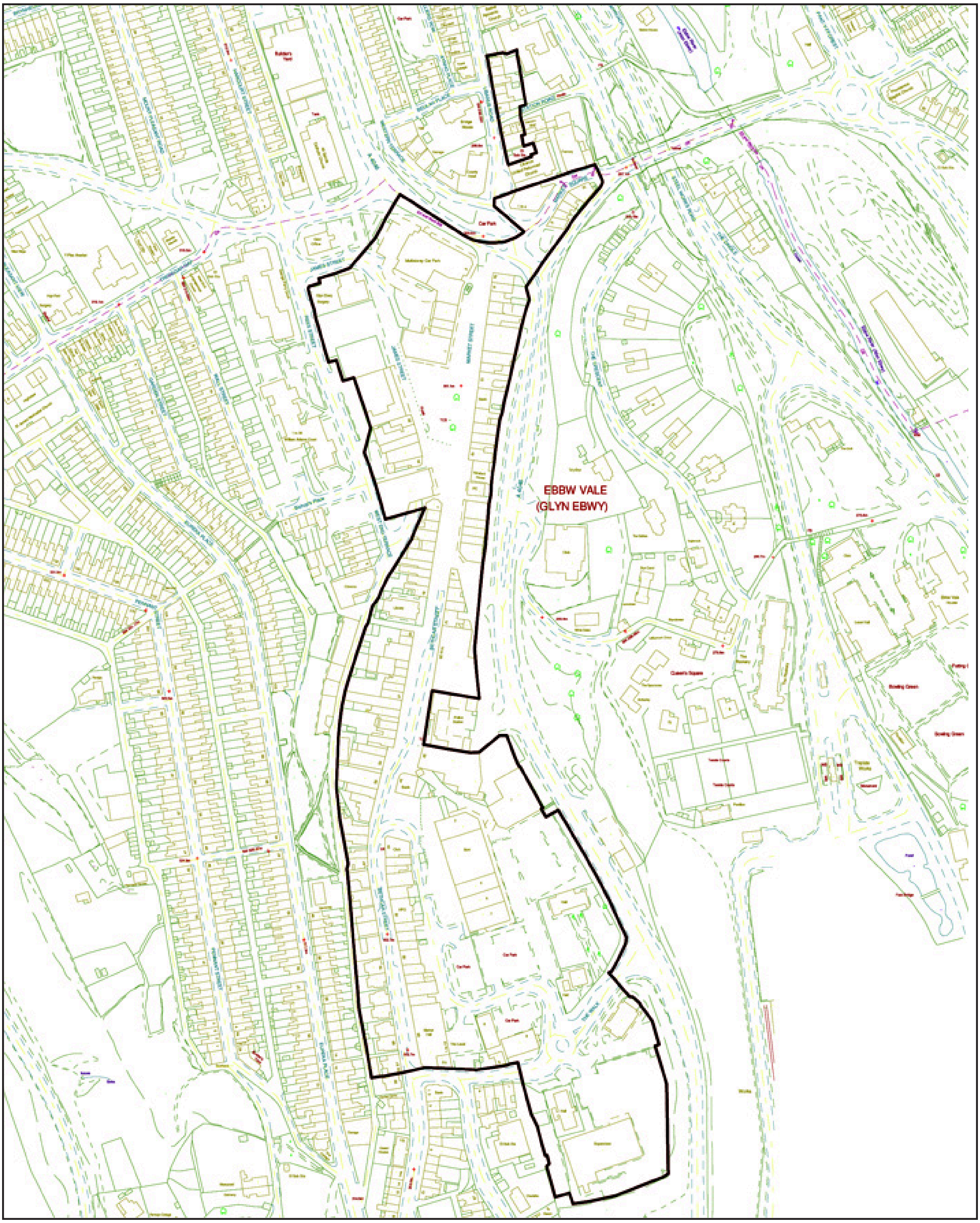


Blaenau Gwent County Borough Council
Environment Directorate
Regeneration Division
Business Resource Centre
Tafarnaubach Industrial Estate
Tredegar, NP22 3AA

G.P.Jones - B.Sc Hons, DipTM, DMS, MRTPI
Chief Regeneration Officer

N

Title : **Appendix F - Ebbw Vale Town Centre** (as defined in the Blaenau Gwent Unitary Development Plan) Scale 1 : 3500



Cyngor Bwrdeisdref Sirol
Blaenau Gwent
County Borough Council

Blaenau Gwent County Borough Council
Environment Directorate
Regeneration Division
Business Resource Centre
Tafarnaubach Industrial Estate
Tredegar, NP22 3AA

G.P.Jones - B.Sc (Hons) DipTm, DMS, MRTPI
Chief Regeneration Officer

N

Title : **Appendix G - Tredegar Town Centre** (as defined in the Blaenau Gwent Unitary Development Plan) Scale 1 : 3400