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Planning Design Economics

**RHONDDA CYNON TAFF**

**RETAIL STUDY**

**SUPPLEMENTARY REPORT ON  
PROPOSED TOWN CENTRE  
LLANTRISANT**

March 2008

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## **1.0 INTRODUCTION**

- 1.1 This report has been prepared by Nathaniel Lichfield and Partners (NLP) on behalf of Rhondda Cynon Taff County Borough Council (RCT).
- 1.2 It is a supplementary report to the 2007 Quantitative Update to the RCT Retail Study, and should be read in conjunction with that document.
- 1.3 RCT are currently progressing their Local Development Plan (LDP), and representations have been made through this process to promote a new retail centre in Llantrisant.
- 1.4 Consideration has therefore been given to what, if any would be an appropriate size, function and format of a new retail centre in Llantrisant.
- 1.5 In investigating this, consideration has been given to national planning policy (Section 2.0) the strength of the existing retail provision in and around the proposed new centre (Section 3.0) and the impact on other centres in the Borough if the market share and penetration rate of the new town centre was increased to three different levels (Section 4.0).

## 2.0 PLANNING POLICY

### Planning Policy Wales (MIPPS 02/2005)

2.1 Chapter 10 of PPW (as amended by MIPPS 02/2005) contains the Assembly Government's planning policy guidance for retailing and town centres.

2.2 It states that the Assembly Government's objectives for retailing and town centres are to:

- Secure accessible, efficient, competitive and innovative retail provision for all communities of Wales, in both urban and rural areas;
- Promote established town, district, local and village centres as the most appropriate locations for retailing, leisure and for other functions complementary to it;
- Enhance the vitality, attractiveness and viability of town, district, local and village centres; and to
- Promote access to these centres by public transport, walking and cycling.

2.3 Local planning authorities should consider through their development plans whether new sites should be identified in town, district, local or village centres for retail development. Paragraph 10.2.2 states that:

*“new regional shopping centres, with more than 50,000 sq m of gross floorspace, can have a substantial impact over a wide area and severely harm the nearest major centres. Although there may be circumstances where they could fulfil an important retail need, full account needs to be taken of all likely impacts and it is unlikely that opportunities exist for such a centre in Wales at present.”*

2.4 Local authorities should adopt a sequential approach to selecting sites where a need is identified. The guidance goes on to advise that local planning authorities should take a positive approach, in partnership with the private sector, in identifying additional sites which accord with this approach.

## **3.0 TOWN CENTRE AUDITS**

### **Introduction**

3.1 Before assessing the need and potential impact of a new retail centre in Llantrisant, it is important to gain an understanding of the current form and function of the local centres that would be immediately affected by the proposal and their vitality and viability. Consideration has been given to the retail centres of Talbot Green and Pontyclun.

### **Pontyclun**

3.2 Pontyclun is a small shopping centre located in the south of the Borough. It is approximately 12 miles north-west of Cardiff and close to Junction 34 of the M4. The centre is located along one road. Although the centre is small, it performs a number of important functions:

- Convenience Shopping – a medium size Spar, a Ferrari's bakers, Bargain Booze and two independent butchers;
- Comparison Shopping – a number of independent retailers are present within the town. However, there are no national chains;
- Entertainment and leisure – including public houses and restaurants; and
- Services – including banks and a range of professional services.

3.3 Pontyclun has 49 ground floor non-residential units as shown in Table 3.1. The Town Centre has a relatively low proportion of units (34.7%) devoted to comparison retail compared with the national average (48.3%). Conversely the centre has a high proportion of services and miscellaneous uses.

3.4 The vacancy rate is much lower than the national average at only 4.1%. One unit which was previously a newsagent's has only recently become vacant and both units are relatively small.

**Table 3.1: Pontyclun Mix of Uses**

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Pontyclun	GB Average (%)
Comparison Retail	15	33.3	48.3
Convenience Retail	5	11.1	9.4
Services/Misc	23	51.1	31.6
Vacant/Under Construction	2	4.5	10.7
<b>Total</b>	<b>45</b>	<b>100</b>	<b>100</b>

3.5 Pontyclun has a small number of convenience outlets with a butchers, bakers and Spar shop present. In terms of comparison shops, there is representation in less than half of the categories outlined in Table 3.2.

**Table 3.2: Pontyclun Breakdown of Comparison Shops**

Type of Unit	Pontyclun		GB Average (%)
	Number of Units	%	
Clothing and Footwear	2	13.3	26
Furniture, carpets and Textiles	2	13.3	10
Booksellers, arts, craft and stationers	0	0	9
Electrical, games, music, photography	1	6.7	11
DIY, hardware and homewares	0	0	6
China, glass, gifts and fancy goods	0	0	4
Cars, motorcycles and motor accessories	0	0	3
Chemist, drugstore, opticians	3	20	8
Variety, Department and catalogue	0	0	2
Florists, nurserymen and seedsmen	1	6.7	2
Toys, hobby, cycle, sport	0	0	6
Jewellers	0	0	5
Other Comparison retailers	6	40	8
<b>TOTAL</b>	<b>15</b>	<b>100</b>	<b>100</b>

3.6 The centre has a relatively high number of service uses for its size in particular banks and other financial services and hair salons and beauty parlours. There is also a high number of restaurants, cafés, takeaways and pubs. However, due to the size of the centre this does not give rise to concern.

**Table 3.3: Pontyclun Breakdown of Service Uses**

Type of Use	Pontyclun		GB Average
	Number of Units	%	%
Restaurant, café, takeaways & pubs	8	34.8	41
Banks and Financial and other services	7	30.5	19
Estate Agents and Valuers	1	4.3	11
Travel Agents	1	4.3	6
Hairdressers and Beauty Parlours	6	26.1	19
Laundries and Dry Cleaners	0	0	4
<b>TOTAL</b>	<b>23</b>	<b>100</b>	<b>100</b>

- 3.7 The topography of the town centre is flat. The majority of the shopping units are in traditional units resembling the prevailing residential style and are housed by predominantly local independent traders rather than national multiples. It is a relatively busy centre in terms of both pedestrian and vehicular flows and appears to be well used by local residents.
- 3.8 The centre is accessed via strong road links from the A4222 as well as benefiting from a rail link within the centre. There is limited off-street car parking to the south-west of the centre, along the road Heol Yr Orsaf. However, there is some on-street parking spaces provided along the main street.
- 3.9 Pontyclun is relatively vibrant for its position in the retail hierarchy, with low vacancy rates and a range of shops and services catering for the everyday needs of local residents. The independent retailers appear to be able to compete with the Leekes department store outside the town and the national multiple retailers at Talbot Green.

### **Talbot Green**

- 3.10 Talbot Green is a district centre which lies approximately 12 miles north-west of Cardiff. The original shopping area comprises one main street, Talbot Road and a secondary street around the local bus station. It extends approximately 400 metres east to west. This original retail core of the town lies immediately adjacent to the modern Talbot Green Retail Park and a short walk from the Glamorgan Vale Retail Park both of which house a number of large retail units (Next, Matalan, Comet etc) and a Tesco Extra Superstore.

3.11 Talbot Green performs a number of important roles:

- Convenience shopping – the Tesco and Aldi stores and a limited range of other small convenience retail facilities;
- Comparison Shopping – a small number of comparison shops in the original core and a range of national retailers in large units on the retail parks;
- Eating Establishments – a limited range of fast food takeaways and restaurants; and
- Services – a range of services including banks and financial/professional services.

3.12 Talbot Road comprises 72 ground floor non-residential units as shown in Table 3.4. This is a decrease of one unit since the NLP Street Survey in 2003. As in 2003 the centre has a small number of retail uses and a high proportion of service and miscellaneous uses. There are only 2 vacant units along Talbot Road, representing a vacancy rate of less than 3%. Within the two retail parks there are 28 units all of which are occupied.

**Table 3.4: Talbot Green Mix of Uses**

Type of Unit	Number of Units				Proportion of Total Units (%)				
	Talbot Road	Talbot Green Retail Park	G V Retail Park	Total	Talbot Green High Street	Talbot Green Retail Park	G V Retail Park	Total	UK Average
<b>Comparison Retail</b>	22	14	10	<b>46</b>	30.5	87.5	83.33	<b>46</b>	<b>48.3</b>
<b>Convenience Retail</b>	3	1	1	<b>5</b>	4.2	6.25	8.33	<b>5</b>	<b>9.4</b>
<b>Services/ Misc.</b>	45	1	1	<b>47</b>	62.5	6.25	8.33	<b>47</b>	<b>31.6</b>
<b>Vacant/ Under Construction</b>	2	0	0	<b>2</b>	2.8	0	0	<b>2</b>	<b>10.7</b>
<b>Total</b>	<b>72</b>	<b>16</b>	<b>12</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

3.13 Talbot Green's retail centre has a convenience offer dominated by the Tesco Extra store on the Retail Park, and has a small number of comparison retailers covering most categories of goods (Table 3.5), which is a slight improvement since 2003. Most of the comparison shops along Talbot Road are small independent traders with the major UK multiple retailers located within the retail parks.

**Table 3.5: Talbot Green Breakdown of Comparison Shops**

Type of Unit	Talbot Road		Talbot Green Retail Park		Glamorgan Vale Retail Park				GB Average (%)
	No. of Units	%	No. of Units	%	No. of Units	%	Total	%	
Clothing and Footwear	2	9.1	6	42.9	3	30			26
Furniture, carpets and Textiles	2	9.1	0	0	2	20	4	8.7	10
Booksellers, arts, craft and stationers	2	9.1	1	7.1	0	0	3	6.5	9
Electrical, games, music, photography	3	13.7	2	14.3	0	0	5	10.9	11
DIY, hardware and homewares	0	0	0	0	1	10	1	2.2	6
China, glass, gifts and fancy goods	1	4.5	0	0	0	0	1	2.2	4
Cars, motorcycles and motor accessories	1	4.5	0	0	1	10	2	4.3	3
Chemist, drugstore, opticians	2	9.1	1	7.1	0	0	3	6.5	8
Variety, Department and catalogue	0	0	1	7.1	1	10	2	4.3	2
Florists, nurserymen and seedsmen	2	9.1	0	0	0	0	2	4.3	2
Toys, hobby, cycle, sport	1	4.5	2	14.3	1	10	4	8.7	6
Jewellers	1	4.5	0	0	0	0	1	2.2	5
Other Comparison retailers	5	22.8	1	7.1	1	10	7	15.3	8
<b>TOTAL</b>	<b>22</b>	<b>100</b>	<b>14</b>	<b>100</b>	<b>10</b>	<b>100</b>	<b>46</b>	<b>100</b>	<b>100</b>

3.14 Talbot Road has a particularly high level of financial and professional services, which account for over half of the service outlets. Talbot Green is represented by five banks/building societies and a large number of other associated financial services (Table 3.6). This high level of services is expected given the size of the centre and therefore does not give rise to concern.

3.15 The centre also has 3 restaurants, 2 public houses, 4 takeaways and 1 café. However, it is also considered that due to the limited size of the centre that this high level of eating establishments is to be expected and is not seen as detrimental to the vitality and viability of the centre.

**Table 3.6: Talbot Green Breakdown of Service Uses**

Type of Use	Talbot Road		Talbot Green Retail Park		Glamorgan Vale Retail Park		Total		GB Average (%)
	Number of Units	%	Number of Units	%	Number of Units	%	Number of Units	%	
Restaurant, café, takeaways & pubs	10	22.3	1	100	1	100	12	25.5	41
Banks and Financial and other services	22	48.9	0	0	0	0	22	46.8	19
Estate Agents and Valuers	6	13.3	0	0	0	0	6	12.8	11
Travel Agents	2	4.4	0	0	0	0	2	4.3	6
Hairdressers and Beauty Parlours	4	8.9	0	0	0	0	4	8.5	19
Laundries and Dry Cleaners	1	2.2	0	0	0	0	1	2.1	4
<b>TOTAL</b>	<b>45</b>	<b>100</b>	<b>1</b>	<b>100</b>	<b>1</b>	<b>100</b>	<b>47</b>	<b>100</b>	<b>100</b>

- 3.16 Shop units within the original retail core include traditional shop designs and converted residential dwellings and larger purpose built retail units behind the bus station and within the retail parks.
- 3.17 Talbot Green has good accessibility via the A4119 dual carriageway and the centre is generally congestion free. The centre has limited car parking provision but there is some on-street parking and considerable parking space within the retail park, although the retail park car parks suffer from congestion at peak times.
- 3.18 In addition to good car access, Talbot Green has a bus station in the centre of the original shopping area. This provides excellent links for shoppers to travel to the centre by public transport.
- 3.19 In conclusion, the land use mix and low vacancy rates in Talbot Green indicate a relatively vital and viable retail centre. The composition of Talbot Road has not changed to a dramatic extent since the NLP Street Survey undertaken in 2003, and therefore the development of the Talbot Green retail park has not damaged the vitality and viability of the original retail core. This is most likely because Talbot Road was already dominated by service uses and the original retail centre of the town now complements the higher order retailing of the Retail Park.

## 4.0 GROWTH SCENARIOS

### Background

- 4.1 The Borough Retail Study and 2007 quantitative update assesses retail capacity and quantitative need, making some adjustments for retail commitments such as the Pontypridd town centre development and Asda at Tonypany which are anticipated to have some affect on shopping patterns within the Borough.
- 4.2 The extent of the Borough within the study area broadly equates to Zones 1 – 4 as follows, with the proposed town centre located in Zone 4:
- Zone 1 – Aberdare
  - Zone 2 – Tonypany/Porth
  - Zone 3 – Pontypridd/Mountain Ash
  - Zone 4 – Llantrisant/Talbot Green
- 4.3 For the Borough as a whole the following projections of quantitative need for additional convenience and comparison goods floorspace were identified:

**Table 4.1 Borough Floorspace Requirements  
(Including allowance for Commitments)**

	<b>2011</b>	<b>2016</b>	<b>2021</b>
<b>Convenience floorspace sq m net</b>	748	1,616	2,507
<b>Comparison goods floorspace sq m net</b>	-	-	21,777
<b>Comparison goods floorspace sq m gross</b>	-	-	31,099

- 4.4 The hiatus in any significant quantitative need for comparison goods floorspace to 2021 is predominantly as a result of the Angharad Walk commitment in Pontypridd and Tirfounder Fields commitment in Aberdare being anticipated before 2016 and absorbing the majority of capacity in the Borough.
- 4.5 In qualitative terms it was concluded that there was no specific need for further retail warehouse floorspace in the Borough.
- 4.6 Whilst the overall need in the Borough for convenience floorspace at 2011 and 2016 is assessed to be low (748 and 1,616 sq net), this reflects the fact that most zones in the Borough were assessed to have an over-supply of existing and committed floorspace, whilst Zone 4, had expenditure capacity of around £18 million,

predominantly due to the high turnover of the Tesco at Talbot Green. It was therefore recommended that a new supermarket in the Zone 4 area (Talbot Green) would be desirable to meet future need and alleviate customer congestion at the Tesco Talbot Green store.

- 4.7 The floorspace requirements identified in Table 4.1 were projected in the Retail Study on the basis of market shares estimated from the results of a household survey of the study area, adjusted at 2011 to take account of retail commitments such as the Asda at Tonypany, Tirfounder Fields in Aberdare and the Angharad Walk scheme.

### **Future Shopping Patterns**

- 4.8 Major retail development at Llantrisant will inevitably change shopping patterns in the sub-region. The consideration of the appropriate level of retail development at Llantrisant will be dependant on a number of interrelated issues, as follows:

- What level of increase in market share/expenditure retention is realistically achievable bearing in mind over-lapping catchment areas and the competition from other centres e.g. Cardiff and Pontypridd?
- Will the likely changes in shopping patterns lead to more or less sustainable patterns of shopping i.e. changes to the number and length of car borne shopping trips?
- Will the likely trade draw from other centres harm the vitality and viability of those centres e.g. Pontypridd and Angharad Walk?

- 4.9 The market shares anticipated at 2011 for convenience and comparison goods are set out in Tables 4.2 and 4.3 below. The Retail Study assumes that these 2011 market shares will remain constant at 2016 and 2021.

**Table 4.2 Existing Comparison Goods Market Shares 2011 Adjusted for Commitments**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow
<b>Market Share</b>									
Aberdare	40%	6%	8%	0%	1%	0%	0%	2%	5%
Pontypridd/Upper Boat	4%	19%	55%	20%	6%	2%	1%	0%	10%
Talbot Green	1%	22%	4%	27%	1%	1%	4%	2%	20%
Tonypandy	0%	10%	0%	0%	0%	0%	0%	0%	0%
Mountain Ash	0%	0%	2%	0%	0%	0%	0%	0%	5%
Porth	0%	3%	1%	0%	0%	0%	0%	0%	0%
Treorchy	0%	3%	0%	0%	0%	0%	0%	0%	0%
Llantrisant	0%	0%	0%	4%	0%	0%	0%	0%	5%
RCT Local Centres	0%	2%	1%	1%	0%	0%	0%	0%	0%
Merthyr Tydfil	24%	2%	8%	0%	55%	4%	0%	2%	n/a
Caerphilly	0%	0%	1%	1%	2%	32%	0%	0%	n/a
Bridgend/McArthur Glen	1%	5%	1%	11%	1%	1%	51%	8%	n/a
Cardiff	18%	19%	15%	27%	20%	28%	18%	3%	n/a
Swansea	8%	1%	0%	1%	2%	0%	13%	31%	n/a
Other outflow	4%	8%	4%	8%	12%	32%	13%	52%	n/a
<b>Market Share Total</b>	<b>100%</b>	<b>n/a</b>							

**Table 4.3 Convenience Goods Market Shares 2011 Adjusted for Existing Commitments**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow
Aberdare	92%	13%	16%	0%	2%	0%	0%	7%	5%
Porth	0%	10%	3%	1%	0%	0%	0%	0%	0%
Tonypandy	0%	37%	0%	0%	1%	0%	0%	0%	0%
Tonyrefail/Ferndale/Treorchy	0%	15%	0%	0%	0%	0%	0%	1%	0%
Mountain Ash/Yns y Bwl	1%	0%	5%	0%	0%	0%	0%	0%	0%
Pontypridd/Upper Boat	1%	4%	62%	30%	2%	2%	0%	1%	5%
Talbot Green	0%	15%	3%	55%	0%	0%	2%	2%	5%
Merthyr Tydfil	3%	1%	1%	0%	85%	3%	0%	3%	n/a
Caerphilly/Blackwood	0%	0%	5%	1%	6%	81%	2%	1%	n/a
Maesteg	0%	0%	0%	0%	0%	0%	20%	5%	n/a
Glyn Neath	0%	0%	0%	0%	0%	0%	0%	20%	n/a
Outflow	3%	5%	5%	13%	4%	14%	76%	60%	n/a
<b>Total</b>	<b>100%</b>	<b>n/a</b>							

4.10 Currently the primary catchment area of shopping facilities at Talbot Green extends to Zones 2 and 4 for convenience and comparison goods.

4.11 For comparison goods, no one centre dominates shopping patterns in the Borough and in this respect the retention rate for Talbot Green (27% for comparison goods) in Zone 4 reflects the general pattern of retention in the Borough, with Pontypridd, Bridgend/MacArthur Glen and Cardiff all attracting reasonable proportions of expenditure from Zones 2 and 4.

4.12 Whilst it is unrealistic to expect any shopping centre to retain 100% of expenditure in its primary catchment area, there is scope for a new town centre in Llantrisant to attract some of the expenditure from Zones 2 and 4 if a critical mass of new retail floorspace was introduced.

- 4.13 The benefits of increasing the level of expenditure retention (increasing market share) in Zones 2 and Zone 4 could be more sustainable shopping patterns with local residents not travelling as far to undertake their food and non-food shopping, and an increase in local employment opportunities.
- 4.14 The disbenefit of an increased market share could be reduced trade in other centres, which may impact upon the vitality and viability of those centres. Furthermore, if the catchment area of shopping facilities in the Talbot Green/Llantrisant area is significantly extended, and increases trade draw from beyond Zones 2 and 4, this could run counter to sustainability arguments in favour of increased retention, i.e. it would encourage longer car borne trips.
- 4.15 Therefore there is a fine balancing act in considering what is an appropriate level of development and increased market share within Zones 2 and 4, through new provision at Llantrisant.

#### **The Llantrisant Proposal**

- 4.16 Interest has been shown through the LDP process in creating a new 'town centre' for Llantrisant to the north of the retail centre of Pontyclun to support the recent and future high levels of housing growth in the area. The intended role and function of this proposed centre is at yet unknown.
- 4.17 Pontyclun currently offers only lower order comparison retailing, limited convenience retailing and a high proportion of service uses. It is appropriate to consider the feasibility and impact of introducing higher order comparison goods shopping and a new large food store in the area.
- 4.18 Three different scenarios have been considered based on different levels of uplift in market share. These scenarios have been explored below and then translated into a floorspace capacity figure for the new town centre.
- 4.19 The consequential impact of this uplift in market share on other centres is also considered, i.e. trade diversion and impact on surrounding centres and commitments (e.g. Pontypridd and Angharad Walk) in the Borough. The adjustments to market shares are based on judgement, although they have been informed by assessing the changes in market share that occurred before and after the redevelopment of the Talbot Green Retail Park.

4.20 It is assumed that, if pursued through the LDP, the new town centre will have a design year of 2016, with implementation in the period 2011 to 2016.

### Convenience Goods

4.21 As shown in Table 4.3, it is currently projected that the convenience goods retention rate will be 55% in Zone 4 at 2011. An increase in market share in this zone could result in more sustainable patterns of shopping. We have considered two scenarios whereby the retention rate is increased to either 60% or 65% through the provision of a new large food store in the proposed town centre, as shown in Tables 4.4 – 4.5.

4.22 It is anticipated that a new food store should be capable of increasing expenditure retention in Zone 4, and should also relieve existing congestion in the Talbot Green Tesco.

**Table 4.4 Projected Convenience Goods Market Shares at 2016 – Scenario 1**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow
Aberdare	92%	13%	16%	0%	2%	0%	0%	7%	5%
Porth	0%	9%	3%	1%	0%	0%	0%	0%	0%
Tonypandy	0%	35%	0%	0%	1%	0%	0%	0%	0%
Tonyrefail/Ferndale/Treorchy	0%	14%	0%	0%	0%	0%	0%	1%	0%
Mountain Ash/Yns y Bwl	1%	0%	5%	0%	0%	0%	0%	0%	0%
Pontypridd/Upper Boat	1%	4%	61%	30%	2%	2%	0%	1%	5%
Talbot Green	0%	20%	4%	60%	0%	0%	5%	2%	5%
Merthyr Tydfil	3%	1%	1%	0%	85%	3%	0%	3%	n/a
Caerphilly/Blackwood	0%	0%	5%	0%	6%	81%	2%	1%	n/a
Maesteg	0%	0%	0%	0%	0%	0%	20%	5%	n/a
Glyn Neath	0%	0%	0%	0%	0%	0%	0%	20%	n/a
Outflow	3%	4%	5%	9%	4%	14%	73%	60%	n/a
<b>Total</b>	<b>100%</b>	n/a							

**Table 4.5 Projected Convenience Goods Market Shares at 2016 – Scenario 2**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow
Aberdare	92%	13%	16%	0%	2%	0%	0%	7%	5%
Porth	0%	9%	3%	1%	0%	0%	0%	0%	0%
Tonypandy	0%	34%	0%	0%	1%	0%	0%	0%	0%
Tonyrefail/Ferndale/Treorchy	0%	14%	0%	0%	0%	0%	0%	1%	0%
Mountain Ash/Yns y Bwl	1%	0%	5%	0%	0%	0%	0%	0%	0%
Pontypridd/Upper Boat	1%	4%	60%	28%	2%	2%	0%	1%	5%
Talbot Green	0%	22%	5%	65%	0%	0%	5%	2%	5%
Merthyr Tydfil	3%	1%	1%	0%	85%	3%	0%	3%	n/a
Caerphilly/Blackwood	0%	0%	5%	1%	6%	81%	2%	1%	n/a
Maesteg	0%	0%	0%	0%	0%	0%	20%	5%	n/a
Glyn Neath	0%	0%	0%	0%	0%	0%	0%	20%	n/a
Outflow	3%	3%	5%	5%	4%	14%	73%	60%	n/a
<b>Total</b>	<b>100%</b>	n/a							

4.23 Within Scenario 1, in addition to the uplift in market share in Zone 4 (55% to 60%) assumed through the introduction of a new large food store, an uplift in the market share in Zone 2 (15% to 20%) is assumed and a small increase in market share of Zone 3 is assumed (3% to 4%).

4.24 Within Scenario 2 there is a slightly higher increase in market share in Zone 4 (55% to 65%). The increase in zone 2 is 15% to 22%, and 3% to 5% in Zone 3.

### Comparison Goods

4.25 The NLP study currently projects at 2016 Zone 4 will have a comparison goods retention rate of 27%. We have considered three scenarios whereby the retention rate in Zone 4 is increased to 35%, 40% and 45% as shown in Tables 4.7 – 4.9 below.

**Table 4.7 Projected Comparison Goods Market Share at 2016 (Scenario 1)**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow
<b>Market Share</b>									
Aberdare	40%	6%	8%	0%	1%	0%	0%	2%	5%
Pontypridd/Upper Boat	4%	18%	55%	18%	6%	2%	1%	0%	10%
Talbot Green	1%	25%	4%	35%	1%	1%	4%	2%	20%
Tonypandy	0%	9%	0%	0%	0%	0%	0%	0%	0%
Mountain Ash	0%	0%	2%	0%	0%	0%	0%	0%	5%
Porth	0%	3%	1%	0%	0%	0%	0%	0%	0%
Treorchy	0%	3%	0%	0%	0%	0%	0%	0%	0%
Llantrisant	0%	0%	0%	4%	0%	0%	0%	0%	5%
RCT Local Centres	0%	2%	1%	1%	0%	0%	0%	0%	0%
Merthyr Tydfil	24%	2%	8%	0%	55%	4%	0%	2%	n/a
Caerphilly	0%	0%	1%	1%	2%	32%	0%	0%	n/a
Bridgend/McArthur Glen	1%	4%	1%	9%	1%	1%	51%	8%	n/a
Cardiff	18%	19%	15%	25%	20%	28%	18%	3%	n/a
Swansea	8%	1%	0%	1%	2%	0%	13%	31%	n/a
Other outflow	4%	8%	4%	6%	12%	32%	13%	52%	n/a
<b>Market Share Total</b>	<b>100%</b>	<b>n/a</b>							

**Table 4.8 Projected Comparison Goods Market Share at 2016 (Scenario 2)**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow
<b>Market Share</b>									
Aberdare	40%	6%	7%	0%	1%	0%	0%	2%	5%
Pontypridd/Upper Boat	4%	16%	53%	16%	6%	2%	1%	0%	10%
Talbot Green	1%	30%	8%	40%	1%	1%	4%	2%	20%
Tonypanyd	0%	8%	0%	0%	0%	0%	0%	0%	0%
Mountain Ash	0%	0%	2%	0%	0%	0%	0%	0%	5%
Porth	0%	3%	1%	0%	0%	0%	0%	0%	0%
Treorchy	0%	3%	0%	0%	0%	0%	0%	0%	0%
Llantrisant	0%	0%	0%	4%	0%	0%	0%	0%	5%
RCT Local Centres	0%	2%	1%	1%	0%	0%	0%	0%	0%
Merthyr Tydfil	24%	2%	8%	0%	55%	4%	0%	2%	n/a
Caerphilly	0%	0%	1%	1%	2%	32%	0%	0%	n/a
Bridgend/McArthur Glen	1%	5%	1%	8%	1%	1%	51%	8%	n/a
Cardiff	18%	18%	14%	23%	20%	28%	18%	3%	n/a
Swansea	8%	1%	0%	1%	2%	0%	13%	31%	n/a
Other outflow	4%	6%	4%	6%	12%	32%	13%	52%	n/a
<b>Market Share Total</b>	<b>100%</b>	<b>n/a</b>							

**Table 4.9 Projected Comparison Goods Market Share at 2016 (Scenario 3)**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow
<b>Market Share</b>									
Aberdare	38%	5%	6%	0%	1%	0%	0%	2%	5%
Pontypridd/Upper Boat	4%	15%	45%	15%	6%	2%	1%	0%	10%
Talbot Green	5%	37%	20%	45%	5%	5%	10%	5%	25%
Tonypanyd	0%	7%	0%	0%	0%	0%	0%	0%	0%
Mountain Ash	0%	0%	2%	0%	0%	0%	0%	0%	5%
Porth	0%	3%	1%	0%	0%	0%	0%	0%	0%
Treorchy	0%	3%	0%	0%	0%	0%	0%	0%	0%
Llantrisant	0%	0%	0%	3%	0%	0%	0%	0%	5%
RCT Local Centres	0%	2%	1%	1%	0%	0%	0%	0%	0%
Merthyr Tydfil	23%	2%	6%	0%	53%	4%	0%	2%	n/a
Caerphilly	0%	0%	1%	0%	2%	31%	0%	0%	n/a
Bridgend/McArthur Glen	1%	4%	1%	8%	1%	1%	50%	7%	n/a
Cardiff	17%	16%	13%	22%	19%	26%	17%	3%	n/a
Swansea	8%	1%	0%	1%	2%	0%	12%	30%	n/a
Other outflow	4%	5%	4%	5%	11%	31%	10%	51%	n/a
<b>Market Share Total</b>	<b>100%</b>	<b>n/a</b>							

4.26 In addition to uplifts in the market share of Zone 4 and consequential reductions in trade draw to other zones, some adjustments to the trade draw from other zones to Zone 4 have also been assumed, varying for each scenario.

4.27 Scenario 1 would have a predominantly local impact on market shares, Scenario 2 would predominantly affect the southern half of the Borough and Scenario 3 would have a sub-regional impact which would also result in increased inflow from beyond the study area.

## Floorspace Capacity

- 4.28 The uplifts in market share will make more expenditure available in Zone 4, which in turn could support new convenience and comparison goods floorspace.
- 4.29 It has been assumed that the new food store would be operated by one of the top four operators - Morrisons, Tesco, Asda and Sainsburys (although it is unlikely to be Tesco given the proximity to their Talbot Green store). An average convenience turnover density of £12,500 per sq m has been assumed.
- 4.30 For convenience goods, the two different market share scenarios would support the following amounts of convenience floorspace:

**Table 4.10 Convenience Floorspace Capacity in Zone 4**

	Scenario 1	Scenario 2
Surplus convenience expenditure £M	£37.68	£46.35
Turnover density £ per sq m	£12,500	£12,500
Net convenience floorspace sq m	3,015	3,708

- 4.31 It should be noted that this relates to net convenience goods only. The total store size will be dependant on the net to gross ratio and the amount of comparison goods.
- 4.32 Both of these sizes of store would be attractive to the main operators and would meet the main food shopping needs of local residents.
- 4.33 The size of store should be viewed in the context of the existing Tesco at Talbot Green, which has a net convenience floorspace of 3,375 sq m and a total net floorspace of 7,180 sq m. Therefore either store size scenario would be capable of competing with the Tesco store.
- 4.34 For comparison goods, the three different scenarios have been explored with differing levels of uplift in market share. The following quantum of floorspace for each scenario is shown below, assuming a turnover density of £5,000 per sq m and a net to gross ratio of 70%:

**Table 4.11 Comparison Floorspace Capacity in Zone 4**

	<b>Scenario 1</b>	<b>Scenario 2</b>	<b>Scenario 3</b>
Surplus comparison expenditure £M	£60.96	£97.68	£224.51
Turnover density £ per sq m	£5,000	£5,000	£5,000
Net comparison floorspace sq m	12,192	19,536	44,902
Gross comparison floorspace sq m	17,417	27,909	64,146

- 4.35 The introduction of around 17,500 sq m gross of comparison retailing, could be supported under Scenario 1 which would place the new town centre at a similar level to Aberdare in the retail hierarchy. In this respect it would predominantly serve residents of Zone 4 and would have some influence on Zone 2.
- 4.36 The quantum of floorspace that could be supported under Scenario 2 would be similar to the quantum of floorspace in Pontypridd once the Angharad Walk scheme is implemented, and the new town centre would be a relatively large centre in the hierarchy. In this respect it would primarily serve residents of Zone 2 and 4.
- 4.37 The quantum of floorspace that could be supported under Scenario 3 would amount to a new sub-regional centre being created in Llantrisant, which would serve all of the Borough and surrounding areas. It would be the largest centre in the Borough.

### **Impact Assessment**

- 4.38 It is important to consider what the impact of the various market share scenarios will be on the other centres in the Borough, before a recommendation on appropriate quantum of floorspace can be made. The figures above show a theoretic level of floorspace that could be supported if the uplifts in market share outlined above were achieved. However, this uplift in market share will result in trade diversion from other centres. The acceptability of each scenario needs to be tested.
- 4.39 At this stage it is difficult to accurately assess the likely impact of each scenario because the precise nature of retail development is not known. The analysis below provides a broad brush assessment of the potential levels of trade diversion and impact. If and when more detailed proposals emerge a more detail assessment of impact will need to be prepared.

### *Convenience Goods*

4.40 The reduction in convenience goods turnover from different centres as a result of a new food store in Llantrisant is assessed in terms of impact on the centre in Table 4.12 below.

**Table 4.12 Impact of Convenience Goods Scenarios at 2016**

<b>Zone</b>	<b>turnover 2016 £M (a)</b>	<b>turnover 2016 £M (1)</b>	<b>turnover 2016 £M (2)</b>	<b>Impact (1)</b>	<b>Impact (2)</b>
Zone 1	£91.10	£91.10	£91.10	0.0%	0.0%
Zone 2	£80.05	£75.17	£73.95	-6.1%	-7.6%
Zone 3	£94.47	£93.73	£90.85	-0.8%	-3.8%
Zone 4	£82.26	£96.59	£105.25	n/a	n/a

*(a) turnover without proposal*

*(1) turnover/impact scenario 1*

*(2) turnover/impact scenario 2*

4.41 Taking into account existing commitments in Tonypany (Asda) and a supermarket in Pontypridd, there is already estimated to be an over-supply of convenience provision in these parts of the Borough at 2011.

4.42 Whilst a new food store in Llantrisant under Scenario 1 would slightly exacerbate this deficit in expenditure in Zone 2 by 2016 it would mainly compete with the new out of centre Asda in Tonypany. It is considered that the benefits of relieving congestion and meeting future need in Zone 4 could outweigh this impact on large food stores in Zone 2.

4.43 Scenario 2 has a slightly wider and higher impact on Tonypany, but is still considered to be within an acceptable level.

4.44 Either size store would therefore be acceptable within Llantrisant provided that no further large food stores are permitted in Zones 2 or 4.

### *Comparison Goods*

4.45 The reduction in comparison goods turnover of different centres as a result of a new town centre in Llantrisant is assessed in terms of impact Borough centres in Table 4.13 below.

**Table 4.13 Impact of Comparison Goods Scenarios at 2016**

Zone	turnover 2016 £M (a)	turnover 2016 £M (1)	turnover 2016 £M (2)	turnover 2016 £M (3)	Impact (1)	Impact (2)	Impact (3)
Zone 1	£84.03	£84.03	£82.49	£75.78	0.0%	-1.8%	-9.8%
Zone 2	£40.26	£37.84	£35.41	£32.99	-6.0%	-12.0%	-18.1%
Zone 3	£223.88	£216.12	£202.41	£184.20	-3.5%	-9.6%	-17.7%
Zone 4	£177.43	£209.35	£246.07	£372.90	n/a	n/a	n/a

(a) turnover without proposal

(1) turnover/impact scenario 1

(2) turnover/impact scenario 2

(3) turnover/impact scenario 3

### Scenario 1

- 4.46 Scenario 1 would involve around 17,500 sq m of new comparison goods floorspace which would primarily serve Zones 2 and 4. Under Scenario 1 the main impact at 2016 will be on Zone 2, however, it is not likely to worsen the impact that the comparison goods commitments of Asda Tonypany and Ynys Fields would have on the zone at 2011.
- 4.47 Zone 3 will experience some impact however, the centre would be smaller than an extended Pontypridd and it is not considered that Scenario 1 would jeopardise the implementation of Angharad Walk or unduly affect the vitality and viability of Pontypridd.
- 4.48 The current average turnover density of comparison goods floorspace in Zone 2 is £1,771 per sq m and £4,723 per sq m in Zone 3. Under Scenario 1 the turnover density in both zones will be above this 2007 level at 2016, demonstrating that the impact on both zones will be offset by growth in available expenditure. The disbenefits of trade diversion/impacts of Scenario 1 should be acceptable given the benefits of increased retention in Zone 4. This is conditional, however, on no further significant levels of comparison goods floorspace being permitted in zones 2, 3 or 4 before 2016.

### Scenario 2

- 4.49 Scenario 2 would involve the creation of around 28,000 sq m gross of comparison goods floorspace, creating a centre 60% greater than the size of scenario 1. Under

Scenario 2, the main impact is again on Zone 2 although the impacts would extend to other centres as well, because the primary catchment area of the proposal would be more extensive.

- 4.50 The impact would be such that the average turnover densities of comparison goods floorspace in Zone 2 would be around 2% lower than current 2007 levels.
- 4.51 Whilst this is unlikely to unduly harm the vitality and viability of centres within each zone it could have implication for the timing and delivery of Angharad Walk, and demonstrates that Scenario 2 is on the limits of acceptability in terms of impact on other centres in the Borough. Further impact on Pontypridd is only avoided if Angharad Walk is implemented before Scenario 2 as both centres would then offer a similar quantum of floorspace and therefore would have only limited overlap in their catchment areas.

### *Scenario 3*

- 4.52 Under Scenario 3 the impact would be felt across the Borough. The quantum of floorspace suggested in this scenario would be in the realms of a sub-regional centre and the impact would extend beyond the Borough.
- 4.53 The level of impact on Zone 2 is considered unacceptable and the viability of the new Angahrad Walk scheme in Zone 3 could be compromised. The impact would be such that average comparison goods turnover density levels Zone 2 at 2016 would be around 10% below current 2007 levels and 16% below in Zone 3.
- 4.54 It is considered that the impacts of Scenario 3 are not justifiable and would be contrary to Assembly policy.

### **Qualitative Issues**

- 4.55 Whilst the introduction of additional retailing is likely to affect existing market shares, the precise influence of the centre will be affected by qualitative factors such as size of shop units, range of goods sold, types of operator and quality of product.
- 4.56 Under comparison goods Scenario 1 it is envisaged that a new town centre would comprise an additional c.15,000 sq m gross of comparison goods floorspace (in addition to c.2,500 sq m of comparison floorspace in a new food store). The impacts of this quantum of floorspace appear reasonable, although the nature of the units

should be controlled. Units of around 100 – 500 sq m in size, would be of an optimum size to attract both multiple retailers and independent operators, and would create a scale of development that would reflect the proportions of a traditional 'High Street'. In addition, the Leekes department store could be redeveloped to a similar size to provide an anchor to the new centre.

- 4.57 A further 1,000 – 1,400 sq m of complementary retail uses such as A2, A3 and A1 services could also be accommodated within the new retail centre.
- 4.58 By serving a predominantly local catchment, accessibility by foot and cycle should be ensured and car parking should be subordinate to the development rather than the dominating impact it has at Talbot Green.
- 4.59 The impacts of Scenario 2 are considered to be on the limits of acceptability and the floorspace would therefore need to be carefully controlled. Around 50% of the floorspace should be restricted to units of less than 500 sq m in order to ensure the centre performs a mainly local role which would not overly compete with Angahrrad Walk. Some large units including a redeveloped Leekes department store would provide for anchor retailers that would reduce outflow to Cardiff.
- 4.60 The impacts of Scenario 3 are considered unacceptable and the quantum of floorspace should not be pursued through the LDP.