RETAIL AND COMMERCIAL LEISURE STUDY

ON BEHALF OF CARDIFF RETAIL AND LEISURE ASSESSMENT STUDY

January 2023

Contents

Appendices

1. Executive Summary

1.1 This Retail and Leisure Study has been commissioned by Cardiff Council. The preparation of the Study has been led and co-ordinated by Nexus Planning, with specialist input from NEMS Market Research on the empirical survey work, and Experian on data production.

1.2 The purpose of the Study is to inform the preparation of the Replacement Local Development Plan 2021 -2036 (RLDP). It aims to provide the Council with an up-to-date, objective assessment of retail and leisure development needs in the Council area and considers possible strategic policy responses to any prevalent or emerging issues.

1.3 The Study has been prepared to reflect the requirements of Planning Policy Wales (PPW) Edition 11 (2021) and Technical Advice Note (TAN) 4: Retail and Commercial Development (2016); and it has also been informed by the relevant local retail policy context of the Adopted Cardiff Local Development Plan (2016), Food, Drink and Leisure Uses SPG (2017) and Consultation Paper on Draft Vision, Issues and Objectives (2021).

1.4 The Study starts by summarising the key current and future retail trends. The current economic circumstances arising from the Covid-19 pandemic, Brexit and the conflict in Ukraine cause the retail and leisure market to continue to be somewhat unstable. Sluggish expansion in household incomes and tepid consumer confidence mean a limited ability or appetite for consumer spending across retail goods and leisure activities. In the meantime, the rise in internet retailing has been accelerated and this continues to have clear implications on the viability of some 'bricks and mortar' retailers. However, this does not mean that physical retail is to become obsolete. Omni-channel is retailing increasingly becoming the norm across the industry. Overall, in a market disrupted by continued changes in consumer behaviour, investing in the consumer experience is anticipated to be the key to success in securing resiliency in retail stores moving forward. Planning policy can play an important role in helping to future-proof city, town and village centres against the ongoing uncertainty.

1.5 The Study then goes on to review existing market shares across the Study Area, as informed by the telephone Household Survey which comprised 2,052 interviews split between the 18 Zones. Overall, the Study summarises the key findings on internet shopping patterns, as well as a survey-derived market share analysis for convenience and comparison goods spending at 'bricks and mortar' locations. We also examine the level of take-up for various leisure activities and examine any locally identified deficiencies in provision.

1.6 There is no capacity to support further convenience or comparison goods floorspace across the City when considered as a whole, by 2036. As such, we do not recommend that any sites are brought forward as part of the Local Plan to accommodate convenience or comparison retailing. Neither our qualitative nor the quantitative assessment of leisure need identified any significant gaps in the provision of larger commercial leisure facilities in the City. Notwithstanding our capacity assessments, there is a level of dissatisfaction with the provision of facilities for children in the City as a whole, and this may be a focus for future Plan policy.

1.7 The Study also provides detailed health check assessments for the city centre and for all eleven district centres. For the twenty local centres, a more concise health-check assessment is provided. Health checks are recognised as important planning 'tools' for appraising and monitoring the changes in the overall vitality and viability of town centres and informing both plan-making and decision-taking at the local level. For each centre, the Study recommends place-specific interventions.

1.8 The Study concludes by providing guidance to inform the emerging Local Development Plan on the following matters: The hierarchy of centres; the spatial extent of centres; and recommended planning policy approach.

2. Introduction

Overview

2.1 This Retail and Leisure Study has been commissioned by Cardiff Council (the Council). The preparation of the Study has been led and co-ordinated by Nexus Planning ("Nexus"), with specialist input from NEMS Market Research on the empirical survey work, and Experian on data production.

2.2 The purpose of the Study is to inform the preparation of the Replacement Local Development Plan 2021 -2036 (RLDP). It aims to provide the Council with an up-to-date, objective assessment of retail and leisure development needs in the Council area and considers possible strategic policy responses to any prevalent or emerging issues.

2.3 The Study has been prepared to reflect the requirements of Planning Policy Wales (PPW) Edition 11 (2021) and Technical Advice Note (TAN) 4: Retail and Commercial Development (2016).

Structure of the Study

2.4 This report is structured as follows:

a. Section 3 provides a summary of the key national and local retail policy context relevant to the Study.

b. Section 4 summarises key current and future retail trends and, in doing so, provides the overarching context for this Study and how it can be used to guide plan-making.

c. Section 5 defines the Study Area and describes the Household Survey undertaken to inform this Study. It summarises the key findings on internet shopping patterns, and the survey-derived market-share analysis for convenience and comparison goods retailing at 'bricks and mortar' locations, as well as comments on the existing leisure trends. The results of the quantitative capacity assessment for new retail (comparison and convenience goods) and leisure floorspace in the Council area are described in detail.

d. Section 6 describes our health-check methodology.

e. Sections 7 to 9 set out health-check assessments for the City Centre, District and Local Centres.

f. Section 10 provides guidance to inform the emerging Local Development Plan on the following matters: The hierarchy of centres; the spatial extent of centres; and recommended planning policy approach.

3. Policy and Legislative Context

Introduction

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

National and Regional Planning Policy Context

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

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

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

3.4 Therefore, the planning system must:

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

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

3.6 In particular, TAN 4 provides additional detail on the methodology for presenting and interpreting the tests of need, impact and the sequential approach for all retail and main town centre use applications in Wales. We discuss these aspects in more detail in section 10.

Local Planning Policy Context

3.7 The **Adopted Cardiff Local Development Plan (2016)** sets out a range of retail and town centre use related policies and considerations in its Section 5. We discuss each of the most relevant policies in detail in our Section 10, and so do not repeat that assessment here. Broadly speaking, the policies of the adopted Plan set out the aims and objectives for governing retail and other town centre uses in Cardiff's Central Shopping Area, and its District (11 no.) and Local (20 no.) Centres, within the context of PPW and TAN 4 guidance. The Plan sets out a Hierarchy of Centres, and how policy looks to share a 'town centres first' approach by encouraging appropriate uses into existing centres, and carefully controlling new uses outside of those centres.

3.8 In addition, the Council has a number of related Supplementary Planning Guidance (SPG) documents. The key SPG of relevance to this study is the one titled **Food, Drink and Leisure Uses (2017)**. The SPG builds on the guidance contained in the adopted Plan and provides a detailed explanation of the factors which are important to creating successful spaces in Cardiff City Centre, and the District and Local Centres. This Study will assist with empirical evidence to inform future iterations of the SPG and policies of the main Plan.

3.9 Turning to emerging guidance, the Council has recently begun consulting on a Replacement Local Development Plan with the issue of a **Consultation Paper on Draft Vision, Issues and Objectives (2021)**. This document is a high-level assessment of options and focuses on the future of Cardiff city centre and Cardiff Bay. Themes of the document are that it acknowledges the greater levels of flexibility which are required in traditional shopping centres coming out of COVID-19 and looking forward to the future, as well as the creating of more healthy and sustainable places in terms of green infrastructure and travel.

4. Current National Retail and Leisure Trends

Introduction

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

The Current State of the UK Economy

4.2 Between February 2020 and February 2022, the UK economy has experienced a significant shock as a result of the Covid-19 pandemic, and the subsequent restrictions on movement and behaviour which have sought to mitigate its impact. The uncertain background has caused business investment and expenditure to decline. The Office of National Statistics ('ONS') estimated that UK GDP contracted by 11.0% in 2020, reflecting the effects of Covid-19 restrictions, albeit recovery began to emerge in 2021 when UK GDP expanded by 7.5%[1]. In June 2022 the level of real GDP was estimated to be 0.2% below where it was pre-coronavirus at Quarter 4 of 2019.[2] However, a deteriorating economic outlook – a combination of instability within UK government, soaring inflation reaching 10.1% in October 2022[3] (which is comfortably outpacing average earnings growth), tax rises, weak businesses investment, and the implications of the war in Ukraine - continues to prevail and the growth outlook for the UK is deteriorating. Over 2022, UK GDP growth is predicted to average between 3.1% and 3.6%, followed by two years of slow, or even negative GDP growth, with the UK potentially entering a recession in 2024.

4.3 Looking specifically at Wales, it has seen the second greatest economic growth since the financial crisis, where between Q1 2010 and Q4 2021 Wales saw a cumulative growth in regional gross value-added of 14.7%. - that was dwarfed by London's 35.2%, but higher than any other nation or region of the UK[5]. During Covid-19, Wales saw the largest decrease amongst the 12 UK countries and English regions in GDP of -11.2% between 2019 and 2020[6]. However, by August 2022 Welsh output (GVA) has recovered to pre-pandemic levels[7]. In general, the Welsh economy has kept pace with changes in the UK economy over the medium term across range of indicators[8]. However, structural weaknesses remain which can hinder Wales' future economic growth. Brexit continues to be a key challenge for Wales due to a large concentration of agricultural and manufacturing firms that have been hit by the negative consequences of the UK's changing trade relations with the EU [9].

The Retail and Leisure Economy

4.4 The retail sector has endured a particularly difficult pandemic, with multiple lockdowns and online competition leading to the permanent closure of many shops and businesses. UK high streets have already been in continuous decline since

[1] ONS, GDP quarterly national accounts, UK: April to June 2022
[2] ONS, GDP quarterly national accounts, UK: April to June 2022
[3] Banks of England, 19 October 2022
[4] PWC, September 2022
[5] Nation.cymru, 05 Jun 2022
[6] gov.wales, Regional gross domestic product and gross value added: 1998 to 2020, May 2022
[7] NIESR, National Institute UK Economic Outlook, 2022
[8] gov.wales, Welsh economy in numbers, 3 October 2022
[9] NIESR, National Institute UK Economic Outlook, 2022

the 2007 recession[10], with consumer habits moving away from the traditional high street experience. The pandemic, however, accelerated these pre-existing challenges, including creating an unprecedented rise in online shopping.

4.5 CoStar's Retail National Report UK 2022 comments[11] as follows:

- Over 2021/2022 the recovery in the retail sector has been observed as the lifting of pandemic restrictions has boosted both footfall and retail sales, and the revival in leasing.
- However, recent positivity comes with its caveats - rising inflation and the rapidly escalating cost-of-living has dented consumer confidence in recent months, with GfK's confidence index falling to a record low in August 2022.
- Meanwhile, retail rents continue to fall and further rent losses are likely in the near term, although retail parks and supermarkets are well placed to outperform given recent demand trends.
- On the supply side, the pandemic has caused the delay, cancellation or amendment of many retail projects across the UK. The 6.7 million square foot of retail space currently under construction nationally represents the lowest figure in more than a decade and less than half the amount underway at the height of the financial crisis in early 2009. Plans are in place to convert many shopping centres and department stores into other uses, too. Little new space is therefore likely to be added on a net basis in the coming years. The trend of converting retail space to other uses is also likely to accelerate.
- UK retail investment has slowed sharply since the coronavirus crisis began. Investor sentiment towards the retail sector, which was already weak prior to the pandemic, has worsened, with property prices dropping to a greater extent than for other sectors. Retail parks have proved popular over the past year or so, thanks to their relative outperformance during the crisis, while shopping centre transactions have also picked up as some investors target redevelopment or repositioning plays. Concerns are present over rising inflation and interest rates and faltering retail sales.

4.6 Looking at the hospitality sector, according to latest research[12], it saw the biggest economic declines of all sectors during the pandemic. Periods of public health restrictions saw large falls in output. The peak of the economic downturn was in April 2020, where economic output in the food & accommodation sector was 90% below pre-pandemic levels (February 2020). Overall, hospitality economic output over 2020 was 42% lower than 2019; and in 2021, hospitality output was 21% lower than 2019. The hospitality industry's share of the UK economy fell from 3% in 2019 to 2% in 2020 and 2021. However, as all coronavirus restrictions were lifted from early 2022, the hospitality sector continues its recovery, particularly as international tourists return. It is forecast that the hospitality and leisure sectors are expected to be the fasted growing parts of the economy over the next five years. This in part reflects the large ground to be recovered following the pandemic.

4.7 To address the growing concerns associated with the High Street, in September 2021, Audit Wales prepared a report named the Regenerating Town Centres in Wales[13]. This report summarised the key challenges and provides six recommendations to the Welsh Government to support the growth of local town centres and villages, which we summarise below:

[10] In 2011, the Portas Review summarised the challenges for high street retailers as follows: "The phenomenal growth of online retailing, the rise of mobile retailing, the speed and sophistication of the major national and international retailers, the epic and immersive experiences offered by today's new breed of shopping mall, combined with a crippling recession, have all conspired to change today's retail landscape".
[11] CoStar's Retail National Report UK 2022, October 2022
[12] House of Commons Library – Research Briefing - Hospitality industry and Covid 19, 11 May 2022
[13] Audit Wales, Regenerating Town Centres in Wales, September 2021

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

Consumer Spending

4.8 Experian Retail Planner Briefing Note 19 (January 2022) makes a number of comments regarding consumer spending (albeit these pre-dates the recent conflict in Ukraine and its wider economic impacts on the UK).

4.9 Retail spending bounced back swiftly following the easing in Covid 19 related restrictions. However, it is losing momentum in the near term as weak confidence and cost pressures weigh on the recovery. Spending should grow over the course of 2022 assuming government measures successfully limit the fallout on jobs and business failures, though its strength is likely to be weakened by muted real wage increases.

4.10 Over the medium term, retail sales volumes are expected to return to a stronger footing with the removal of Brexit and Covid-19 related uncertainty and a strengthening economic backdrop. However, the weakened financial positions of households, businesses and government will be a constraint and spending volumes will remain, on average, 6% below levels expected before the crisis. In the long term, the Covid-19 crisis is unlikely to impact on the economy's growth potential. Although increasing inflation will also be an important factor.

4.11 The short-term outlook for convenience goods has been upgraded by Experian to reflect the boost to spending on food from social distancing measures such as working from home. However, these are expected to unwind over the medium/longer-term, returning the growth-per-head back down to 0.1% per annum.

4.12 Comparison goods retailer margins are under considerable pressure due to rising costs and price discounting, threatening store viability. Experian predicts that sluggish expansion in household incomes and tepid consumer confidence will result in a limited ability or appetite for spending.

4.13 As also forecast by CoStar, leisure spending is expected to increase dramatically over 2022/2023 as confidence grows amongst the consumers to visit public places and to "make up for lost time" during the lockdown period. Over the medium term, the spend per head will continue to increase, albeit with the spend per head being marginally lower compared to the pre-pandemic levels.

Figure 4.13.1 **Experian's Identified UK retail spending (including non-store) and leisure spending**[14]

Volume Growth Per Head (%) Annual averages	2021-30	2031-40	2021-40	1997-2007	2008-11	2012-20	1997-2020
Retail Spend	1.8	2.1	1.9	5.2	0.0	2.1	3.2
Convenience goods	-0.1	0.1	-0.2	-0.6	-2.8	0.5	-0.6
Comparison goods	2.8	2.9	2.8	8.3	1.0	3.2	5.1
of which bulky	3.4	3.4	3.4	10.7	2.6	3.6	6.6
Non-bulky	2.5	2.7	2.5	6.9	0.0	2.9	4.2
Leisure	3.4	0.8	3.0	-0.3	-3.7	-4.2	-2.4
Consumer spending	1.8	1.4	1.7	2.8	-1.0	0.0	1.1

Source: Figure 2 of Experian Retail Planner Briefing Note 19

Online Shopping

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

4.15 Generally, Experian shows that growth in non-store retail is expected to be maintained, particularly through the wider adoption of commonplace technology such as mobile phones and tablets combined with 5G and fibre networks, faster delivery times and easier returns processes to make internet shopping even more convenient. Experian expects that market share will continue to grow strongly in the mid-term, whereby in 2025, 30% of retail expenditure would be spent online. The pace of e-commerce growth is anticipated to moderate over the longer term, reaching 36.5% of total retail sales by 2040[15].

Figure 4.15.1 **Experian's Identified and Forecast Market Share of Non-Retail Sales**[16]

Volume Growth Per Head (%)	2022	2025	2030	2035	2040
Total	27.4	30.4	33.5	35.3	36.5
Convenience goods	19.1	21.8	23.6	27.7	25.7
Comparison goods	31.9	34.8	37.8	39.3	40.2

Source: Figure 5 of Experian Retail Planner Briefing Note 19

Omni-Channel Retail

4.16 The ongoing popularity of internet shopping continues to have clear implications in respect of the viability of some 'bricks and mortar' retailers. However, this does not mean that physical retail is to become obsolete.

4.17 Omni-channel retail (or omni-channel commerce) is increasingly becoming the norm across the industry. This is a multichannel approach to sales that focuses on providing a seamless customer experience whether the client is shopping

[14] Experian, Retail Planner Briefing Note 19, January 2022
[15] Experian, Retail Planner Briefing Note 19, January 2022
[16] Experian, Retail Planner Briefing Note 19, January 2022

online or in a brick-and-mortar store. For example, many stores sell online but fulfil orders from regular stores rather than warehouses[17]. Such purchases, therefore, help to sustain tangible retail floorspace.

4.18 Specifically looking at Wales, a report by Barclays Corporate Banking, indicates that click and collect shopping will be worth £1.4bn in Wales in 2022[18]. In essence, goods that are bought online but picked up from a physical store, now accounts for 31% of sales for retailers who offer the service in Wales[19]. This report therefore shows how online and retail sales channels are becoming more intertwined.

4.19 The acceleration in consumer behaviour change in 2020 has made an omni-channel strategy more important than ever. In research conducted by BigCommerce and Retail Dive in 2020, 46% of retail executives said they planned to increase their investment in omni-channel retailing moving forward, a move away from their plans prior to COVID-19[20].

4.20 When it comes to shopping in physical stores, 2021 research by Klarna[21] (an online shopping platform) highlights that physical retail is still an important channel even for digital-savvy shoppers: Shoppers are nearly twice as likely to value seeing and feeling items they're buying in real life (88% Klarna shoppers); meanwhile, half (49%) of shoppers value being able to visit showrooms and see items in store but pay online.

Conclusion

4.21 The retail market has experienced significant changes in recent years and the prevailing retail environment continues to be somewhat unstable. In response to this unpredictability, those operating in the market are forced to adapt quickly or otherwise face falling profits.

4.22 In a market disrupted by continued changes in consumer behaviour, investing in the consumer experience is anticipated to be the key to success in securing resiliency in retail stores moving forward. Planning policy can play an important role in helping to future-proof city, town and village centres against the ongoing uncertainty, and we come back to this issue in Section 10.

[17] This is particularly the case with food shopping and speciality comparison goods purchases, where retailers often try to tap into a wider market through an online presence.
[18] Business News Wales, Click-and-Collect Economy Worth Over £1.44bn in Wales as 'Hybrid' Shopping Grows, October 2022
[19] Business News Wales, Click-and-Collect Economy Worth Over £1.44bn in Wales as 'Hybrid' Shopping Grows, October 2022
[20] bigcommerce.co.uk
[21] Internet Retailing, 13 October 2021

5. Market Shares and Capacity Assessment

Introduction

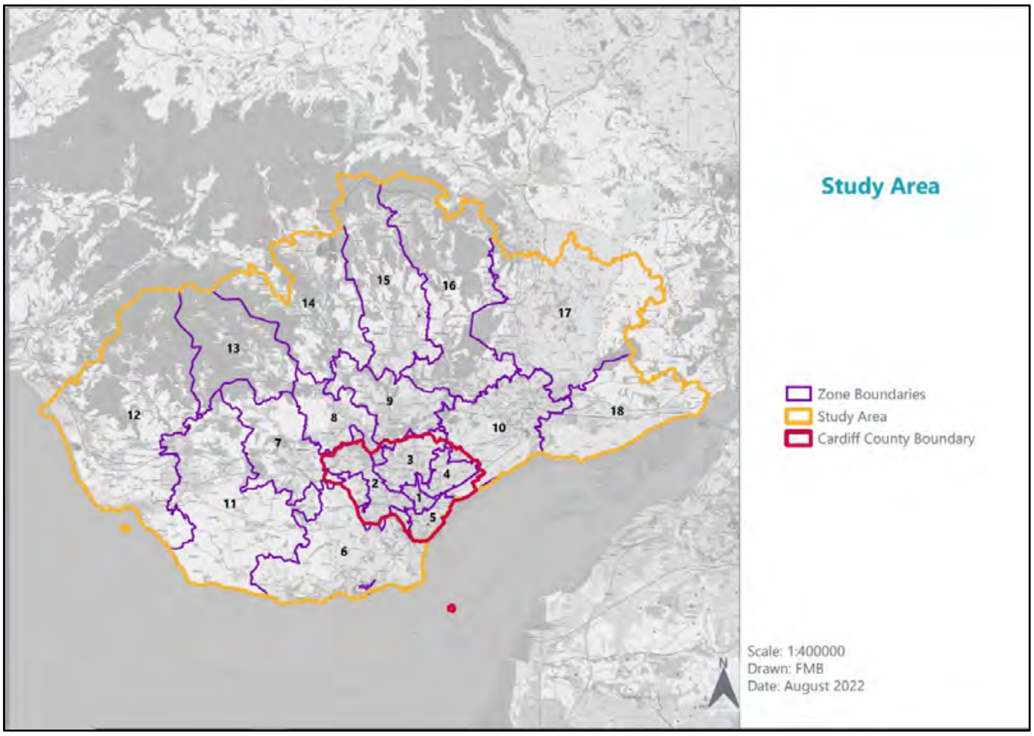
5.1 This section defines the Study Area and describes the Household Survey undertaken to inform this Study. It summarises the key findings on internet shopping patterns, as well as a survey-derived market share analysis for convenience and comparison goods spending at 'bricks and mortar' locations. We also examine the level of take-up for various leisure activities and examine any locally identified deficiencies in provision.

5.2 As part of this analysis, we set out the results of our quantitative capacity assessment for new retail (comparison and convenience goods) and leisure floorspace in the Council area, covering the period from 2022 to 2036.

Study Area & Household Telephone Surveys

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

Figure 5.3.1 **Study Area**



Source: Appendix A

5.4 The Study Area is the subject of a household telephone survey undertaken by NEMS Market Research. Household Surveys are widely recognised across the retail and leisure industry, and within TAN 4 guidance, as an excellent means of understanding where people within a specified area carry out their retail and leisure expenditure. The purpose of the

Study Area Household Survey is to inform our quantitative analysis of the turnover of specific retailers, towns and other destinations, as well as its qualitative findings on attitudes and perceptions of different centres.

5.5 Study Area Household Survey comprised 2,052 interviews split between the eighteen Zones and was based on population ratios in order to obtain accurate samples. A full description of the research methodology, sampling size, weightings and sample profiles is contained at the beginning of the NEMS report in **Appendix B**. NEMS quote their work as being within a 95% confidence range.

5.6 The figure below sets out the postcode sectors which comprise each Zone.

Figure 5.6.1 **Study Area Postal Sectors and Number of Interviews**

Zone	Postal Sectors	Household Survey Interviews
1	CF10 1, CF10 2, CF24 0, CF24 1, CF24 3, CF24 4, CF10 3, CF14 3	150
2	CF 5 1, CF 5 2, CF 5 3, CF 5 4, CF 5 5, CF11 9, CF15 8, CF15 9	150
3	CF14 0, CF14 1, CF14 2, CF14 4, CF14 5, CF14 6, CF14 7, CF14 9, CF23 6	150
4	CF 3 0, CF 3 1, CF 3 3, CF 3 4, CF 3 5, CF23 9, CF23 5, CF23 7, CF23 8	150
5	CF24 2, CF24 5, CF10 4, CF10 5, CF11 0, CF11 6, CF11 7	150
6	CF 5 6, CF62 3, CF62 4, CF62 5, CF62 6, CF62 7, CF62 8, CF62 9, CF63 1, CF63 2, CF63 3, CF63 4, CF64 1, CF64 2, CF64 3, CF64 4, CF64 5, CF11 8	100
7	CF39 8, CF72 8, CF72 9	100
8	CF37 1, CF37 2, CF37 5, CF38 1, CF38 2, CF15 7	100
9	CF37 4, CF83 1, CF83 2, CF83 3, CF83 4, CF83 8	100
10	CF 3 2, CF 3 6, NP10 0, NP10 8, NP10 9, NP18 3, NP19 0, NP19 7, NP19 8, NP19 9, NP20 1, NP20 2, NP20 3, NP20 4, NP20 5, NP20 6, NP20 7	100
11	CF31 1, CF31 2, CF31 3, CF32 9, CF35 5, CF35 6, CF61 1, CF61 2, CF71 7	100
12	CF31 4, CF31 5, CF32 0, CF32 8, CF33 4, CF33 6, CF34 0, CF34 9, CF36 3, CF36 5, SA13 1, SA13 2, SA13 3	100
13	CF32 7, CF39 0, CF39 9, CF40 1, CF40 2, CF41 7, CF42 5, CF42 6, CF43 3, CF43 4	100
14	CF37 3, CF44 6, CF44 7, CF44 8, CF45 3, CF45 4, CF46 5, CF46 6, CF47 0, CF47 8, CF47 9, CF48 1, CF48 3, CF48 4	100
15	CF81 8, CF81 9, CF82 6, CF82 7, CF82 8, NP12 0, NP12 1, NP12 2, NP12 3, NP22 3, NP22 4, NP22 5, NP24 6	100
16	NP 4 6, NP 4 7, NP 4 9, NP11 3, NP11 4, NP11 5, NP11 6, NP11 7, NP13 1, NP13 2, NP13 3, NP23 4, NP23 5, NP23 6, NP23 7, NP23 8, NP44 6, NP44 7	102
17	NP 4 0, NP 4 5, NP 4 8, NP15 1, NP18 1, NP44 1, NP44 2, NP44 3, NP44 4, NP44 5, NP44 8	100
18	NP18 2, NP19 4, NP26 3, NP26 4, NP26 5	100
Study Area Total		**2,052**

Source: Appendix B

Study Area Population

5.7 Population data for Zones 1 to 5 (Inner Study Area) is sourced from Experian MMG3 data (2021 report). The 2022 figures are projected forward to 2036 on a pro-rata basis reflecting the Council's latest housing and population forecasts. In relation to Zones 6 to 18, the population data for all years is sourced from Experian MMG3 data (2021 report).

Figure 5.7.1 **Population Projections**

Zone	Population				Population Growth
Zone	**2022**	**2025**	**2030**	**2036**	**2022-2036**
Zone 1 – Cardiff Central	64,470	64,915	65,373	65,839	2.1%
Zone 2 – Cardiff West	84,555	85,139	85,739	86,351	2.1%
Zone 3 – Cardiff North	78,119	78,658	79,213	79,778	2.1%
Zone 4 – Cardiff East	76,718	77,248	77,792	78,347	2.1%
Zone 5 – Cardiff South	53,713	54,084	54,465	54,854	2.1%
Inner Study Total	**357,575**	**360,044**	**362,582**	**365,168**	**2.1%**
Zone 6	119,330	120,067	120,726	121,388	1.7%
Zone 7	44,478	44,616	44,777	44,886	0.9%
Zone 8	55,495	55,636	55,757	55,872	0.7%
Zone 9	64,383	64,474	64,545	64,624	0.4%
Zone 10	143,684	144,719	145,719	146,689	2.1%
Zone 11	79,906	80,277	80,649	80,998	1.4%
Zone 12	106,954	107,422	107,859	108,251	1.2%
Zone 13	78,047	78,199	78,363	78,541	0.6%
Zone 14	111,343	111,682	111,949	112,236	0.8%
Zone 15	100,402	100,489	100,575	100,618	0.2%
Zone 16	124,623	124,742	124,807	124,853	0.2%
Zone 17	76,891	77,049	77,229	77,414	0.7%
Zone 18	39,859	40,063	40,253	40,426	1.4%
Total Study Area	**1,502,970**	**1,509,479**	**1,515,790**	**1,521,964**	**1.3%**

Source: Appendix C

Non-Store Retailing or Special Forms of Trading

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

Convenience Goods Online Shopping

5.9 The household survey asked residents of the Study Area where they normally undertake their main food and grocery shopping.

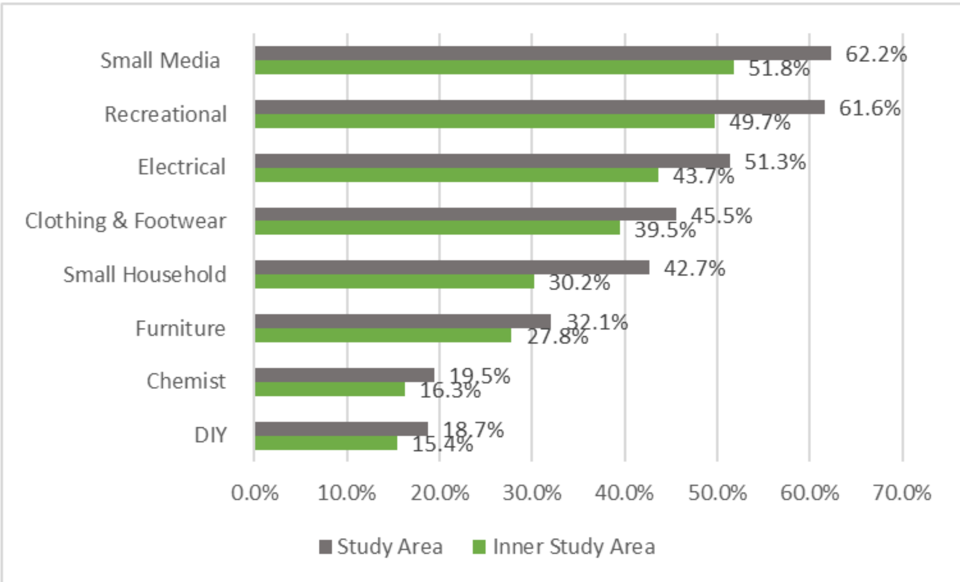
5.10 Across the whole Study Area, 11.3% of respondents usually shop online for their main food shop (Question 1 of the Household Survey). Looking at the Inner Study Area (Zones 1 to 5), the average figure is circa 12.0%. As set out in Section 4, the UK average for online convenience shopping in 2022 is 19.1%. As such, the take-up of online convenience shopping in the Study Area and in the Inner Study Area is considerably lower than the UK average. This is likely to be because of the availability of a wide range of readily accessible bricks and mortar foodstores in a large urban area such as Cardiff meaning that there is a lower dependence on online shopping.

5.11 Question 2 of the Household Survey shows that online convenience goods trade carried out across the Study Area is dominated by Tesco (36.4%) and Asda (28.0%), albeit the preferences on a zone-by-zone bases vary across the Inner Study Area.

Comparison Goods Online Shopping

5.12 The household survey also asked where respondents usually shop for different types of comparison goods. The findings presented in the figure below show that the take-up for online shopping varies across the categories. On average, within the Study Area, 41.7% of respondents shop online for comparison goods, compared to a UK average of 31.9%. There is therefore a significantly higher propensity to shop for comparison goods online in the Study Area, than across the UK as a whole. However, on average, within the Inner Study Area, only 34.3% of respondents shop online for comparison goods which is only slightly higher than the UK average of 31.9%.

Figure 5.12.1 **Online Comparison Goods Spending in the Study Area**



Source: Appendix C

Retail Expenditure Forecasts

5.13 Retail expenditure data has been sourced from our in-house Experian MicroMarketer G3 system. We obtain separate data for convenience and comparison goods, which in turn is broken down into multiple goods categories, as set out in our full statistical assessment in **Appendix C**.

5.14 The data takes account of the socio-economic characteristics of the local population to provide local consumer expenditure calculations. Experian is a robust source of population and expenditure data that is widely used for calculating retail capacity across the industry.

5.15 Expenditure data from Experian is provided per capita in 2020 prices, as is every subsequent monetary value. Using the growth rates presented in Table 6 of Experian Retail Planner Briefing Note 19 (January 2022), which are reproduced in the table below, the per capita expenditure is then projected forward to the base year (2022) and the relevant assessment years. Adjustments are made at every step to account for the growth in special forms of trading (SFT).

5.16 There are two elements that should be noted here:

a. Experian notes that long-term forecasts should be treated with caution, and that they should be subject to regular reviews given the wide range of factors that can influence the broader national economy. Experian produces annual updates to reflect this, and as we go on to discuss in our recommendations later in the report, we would advise that some of the expenditure data inputs to this report be re-visited in another 12 -24 months in recognition of the exceptionally turbulent economic times surrounding both Covid-19 and Brexit, the full implications of which have yet to be realised at the time of writing.

b. Experian Retail Planner Briefing Note 19 (January 2022) provides estimated year-on-year forecasts of internet and other SFT, which allows us to 'strip out' any expenditure that is, either now or in the future, diverted to SFT. This ensures that the increasing propensity to shop by SFT is accounted for in our modelling. These increasing deductions for SFT have the effect of off-setting some of the growth in expenditure in the Study Area derived from population increases. Furthermore, many brands offer online sales, but source the goods from their own stores' shelves. This is often the case for foodstores where employees will pick online orders from stores' shelves before, during or after opening hours. These orders are then delivered by dedicated vans from each store and as such, the online expenditure is attributed to tangible stores. Experian provides 'adjusted' figures to account for this.

Figure 5.16.1 **'Adjusted' Special Forms of Trading Market Share Forecasts**

Year	Convenience growth rates (%)	Comparison growth rates (%)
2021	-4.6	0.5
2022	-1.4	5.9
2023	-0.2	1.8
2024	-0.2	1.8
2025	-0.1	1.9
2026	-0.1	2.0
2027	-0.1	2.1
2028	0	2.3
2029	0	2.4
2030	0	2.4
2031	0.1	2.5
2032	0.1	2.6
2033	0.1	2.6
2034	0.1	2.6
2035	0.1	2.7
2036	0.1	2.7

Source: Figure 6, Experian Retail Planner Briefing Note 19, January 2022

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

Figure 5.17.1 **Retail Expenditure Forecasts in the Study Area (£m)**

	2022	2025	2030	2036	Growth 2022-2036
Convenience	£3,513.2	£3,511.0	£3,518.8	£3,554.6	1.2%
Comparison	£5,687.9	£6,033.2	£6,768.9	£7,936.7	39.5%

Source: Tables 1b & 7b, Appendix C

Convenience Goods Findings

Market Shares

5.18 Before considering the capacity for new convenience goods floorspace, we firstly examine the overall convenience goods spending by residents of the Study Area. Figure 5.22 shows where Study Area residents are spending their money.

5.19 The results show that destinations in the City area account for 24.8% (£872.8m) of the spending of all Study Area residents in 2022. The remaining 75.2% (£2,640.4 m) of spending carried out by residents of the Study Area takes place at destinations beyond the City area.

5.20 Looking at the Inner Study Area in isolation (Zones 1 to 5 only), a healthy 90.1% (£771.5m) of expenditure is 'retained' by the City; with only 9.9% (£84.9 m) spent outside of the City. 20.1% of expenditure in the Inner Study Area goes to the range of designated centres within the City, whereby Cardiff City Centre has the strongest pull, closely followed by Thornhill District Centre. The majority of convenience goods spend though, some 69.9% of all convenience goods spending, is directed towards out-of-centre destinations. The Newport Road area (which hosts Aldi, Lidl, M&S, Morrisons and Sainsbury's) has the strongest pull with 10.1% of all spending; followed by the Excelsior Estate (hosting Aldi and Tesco) with 8.7%, and the Cardiff Bay area (hosting Aldi, Asda, Lidl and Morrisons) with 8.0%. Culverhouse Cross (which hosts Tesco, Aldi and M&S) lies just outside the City boundary and draws 5.0% of convenience goods trade from the Inner Study Area.

5.21 Based on the Inner Study Area market shares, the most popular standalone food stores within the City area are those out of centre namely: Tesco Extra at Excelsior Estate with 7.0% draw, Asda at Cardiff Gate Retail Park with 6.1%, and Sainsbury's at Colchester Avenue (part of the Newport Road Area) with 4.8%.

5.22 Overall, the market share assessment indicates that the City provides well for its own residential population in terms of convenience goods spending. A retention figure of 90.1% is a healthy indicator. However, it is evident that out-of-centre destinations within the City (as well as the Culverhouse Cross just outside the City) dominate convenience shopping attraction, thus creating heavy competition for the designated centres.

Figure 5.22.1 **Convenience Goods Market Share by Destination**

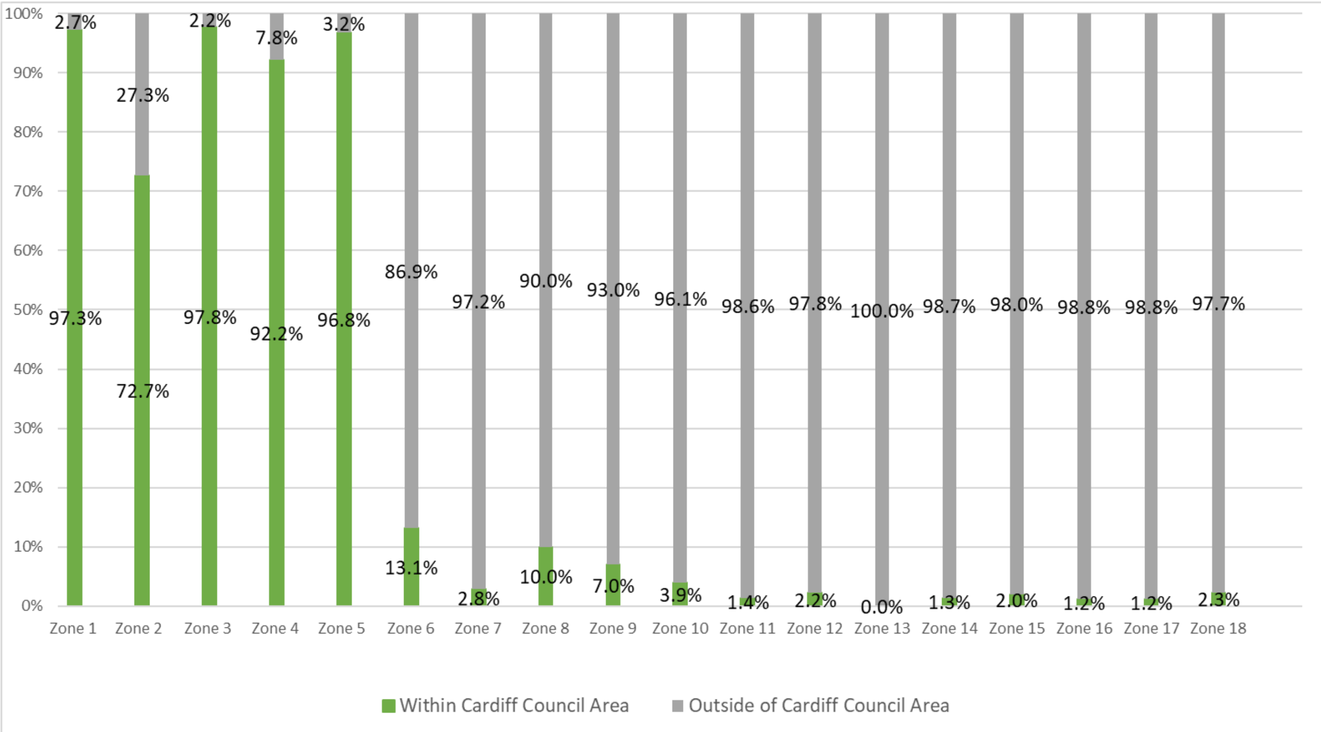
Destination	Inner Study Area (Zone 1 -5) (%)	Inner Study Area (Zone 1 -5) (£m)	Total Convenience (%)	Total Convenience (£m)
Within Cardiff Council Area	**90.1%**	**£771.5**	**24.8%**	**£872.8**
In Centre	**20.1%**	**£172.5**	**5.2%**	**£184.1**
Cardiff CC	4.8%	£41.0	1.3%	£44.7
DC - Thornhill	4.4%	£37.3	1.2%	£42.2
DC - Albany Road / Wellfield Road	1.8%	£15.8	0.5%	£15.8
LC - Splott	1.3%	£10.7	0.3%	£10.7
DC - Penarth Road / Clare Road	1.2%	£10.5	0.3%	£11.6
All Other Centres	6.7%	£57.1	1.7%	£59.0
Out of Centre	**69.9%**	**£598.9**	**19.6%**	**£688.7**
Newport Road Area (Aldi, Lidl, M&S, Morrisons, Sainsbury's etc)	10.1%	£86.3	2.6%	£93.1
Excelsior Estate (Aldi, Tesco)	8.7%	£74.5	2.3%	£81.9
Cardiff Bay (Aldi, Asda, Lidl, Morrisons etc)	8.0%	£68.2	2.6%	£90.1
Asda, Cardiff Gate Retail Park	6.1%	£52.0	1.5%	£53.7
Morrisons, Ashbourn Way	4.5%	£38.5	1.3%	£43.9
Asda, Longwood Drive	4.2%	£36.0	1.2%	£40.4
Other Out of Centre Destinations	28.4%	£243.4	8.1%	£285.5
Outside of Cardiff Council Area	**9.9%**	**£84.9**	**75.2%**	**£2,640.4**
Culverhouse Cross (South Side), Cardiff (Tesco, Aldi, M&S)	5.0%	£42.5	2.4%	£86.0
Pontyclun / Talbot Green	1.2%	£10.1	3.4%	£118.2
Caerphilly	1.0%	£8.2	3.7%	£130.6
Penarth	0.6%	£5.1	1.3%	£44.2
Pontypridd	0.5%	£4.4	3.7%	£131.3
Bridgend	0.5%	£3.9	7.7%	£272.0
Newport	0.4%	£3.7	8.9%	£311.0
Caldicot	0.4%	£3.7	1.6%	£56.6
Other Destinations Outside of Cardiff Council Area	0.4%	£3.3	42.4%	£1,490.5
TOTAL	**100.0%**	**£856.3**	**100.0%**	**£3,513.2**

Source: Appendix C

5.23 Importantly, we can also examine the destination of convenience goods spend within each Zone of the Study Area. Figure 5.24 assesses the amount of convenience goods spending carried out in the Council area by residents of each Zone. The results show that there are very healthy levels of retention in Zones 1 to 5 (i.e. Inner Study Area). Zones 1, 3, 4 and 5 'retain' in excess of 92% of their residents' convenience goods spending. The retention rate in Zone 2 is notably lower at 72.7%, with the greatest proportion of trade being 'leaked' to Culverhouse Cross.

5.24 Turning then to consider the flows of trade from Zones 6 to 18, it is notable that there is relatively little 'inflow' to the City area. This is likely to be a result of the relative geographic location of these Zones and the availability of convenience shopping alternatives nearer to home. Whilst a number of residents in Zones 6 to 18 might work in Cardiff, it would be unusual for significant amounts of convenience goods (especially fresh and frozen goods) to be commuted lengthy journeys.

Convenience Goods Market Share by Zone



Source: Appendix C

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

Figure 5.25.1 **Convenience Benchmarking**

Destination	Benchmark Turnover (£m)	Survey Turnover (With 2% Inflow from Beyond Study Area (£m)	Trading Position against Benchmark (£m)	Trading Position against Benchmark (%)
Within Cardiff Area	1202.5	890.2	-312.3	-26.0%
In-Centre	221.0	187.7	-33.2	-15.0%
Out of Centre	981.5	702.5	-279.0	-28.4%

5.26 The results show that the convenience floorspace in the City is, on average, performing below benchmark when considered cumulatively. Facilities in the City are trading at an average of 26.0% below benchmark. Cumulatively the centres in the County perform 15.0% below benchmark. Out-of-centre destinations are performing 28.4% below benchmark when considered cumulatively. This is likely to be because, similar to many cities I the UK, Cardiff has a saturated foodstore market with many operators prepared to trade one or more stores at below company average trading performance in order to secure 'brand presence'.

5.27 The table below sets out the best and worst-performing standalone stores.

Figure 5.27.1 **Best and Worst Performance Benchmarking – Convenience Goods**

Destination	Benchmark Turnover (£m)	Survey Turnover (With 2% Inflow from Beyond Study Area (£m)	Trading Position against Benchmark (£m)
Best Performing			
Lidl, Maes-Y-Coed Road (Out of Centre)	14.8	30.3	15.4
Tesco Express, Cowbridge Road East (Out of Centre)	3.2	13.3	10.1
Tesco Express, Corporation Road (Penarth Road / Clare Road District Centre)	2.1	11.9	9.8
M & S, Llanishen (Out of Centre)	9.1	17.9	8.8
Tesco Metro, Albany Road (Albany Road / Wellfield Road District Centre)	3.9	11.7	7.8
Aldi, City Link Retail Park (Out of Centre, Newport Road Area)	10.3	16.4	6.1
Aldi, Caerphilly Road (Out of Centre)	14.8	20.0	5.2
Lidl, Maindy Road (Out of Centre)	10.3	14.7	4.5
Worst Performing			
Morrisons, International Drive (Out of Centre, Cardiff Bay)	65.1	10.0	-55.1
Asda, Longwood Drive (Out of Centre)	87.4	41.2	-46.2
Tesco Extra, Eastern Bay Road (Out of Centre)	67.1	27.0	-40.0
Tesco Extra, Excelsior Estate (Out of Centre)	104.0	67.3	-36.8
Morrisons, Ipswich Road (Out of Centre, Newport Road Area)	47.8	14.3	-33.5
Asda, Capital Retail Park (Out of Centre)	73.3	41.8	-31.5
Tesco Superstore, Crickhowell Road (St Mellons District Centre)	41.0	9.5	-31.5
Waitrose, Croescadarn Close (Out of Centre)	39.1	16.7	-22.4
Asda, Cardiff Gate Retail Park (Out of Centre)	73.3	54.8	-18.5
Sainsbury's, Excalibur Drive (Thornhill District Centre)	61.1	43.0	-18.0
Asda, Ferry Road (Out of Centre, Cardiff Bay)	67.6	52.2	-15.4
Sainsbury's, Colchester Ave (Out of Centre, Newport Road Area)	56.0	41.7	-14.3

M & S, Avenue Retail Park (Out of Centre, Newport Road Area)	17.4	6.8	-10.6
Lidl, Caxton Place (Out of Centre)	9.3	3.8	-5.5
Morrisons, Ashbourn Way (Out of Centre)	49.4	44.8	-4.6
Lidl, Capital Retail Park (Out of Centre)	8.8	4.3	-4.5
Tesco Express, Capitol Shopping Centre (Cardiff City Centre)	6.9	3.4	-3.5

Source: Table 4, Appendix C

Convenience Goods Capacity

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

5.29 Importantly, we also note that any quantitative retail capacity that we may identify across the Study Area does not necessarily equate to justification for new retail floorspace in itself (especially in out-of-centre locations), and any such development would be required to be assessed in line with TAN4 policy in terms of impacts on the vitality and viability of town centres, the potential to prejudice emerging town centre developments, and the ‘town centre first’ sequential approach to site selection. Equally, the converse also applies and a lack of identified capacity should not specifically rule out retail developments, where other material factors support such development.

5.30 Detailed quantitative retail capacity tables are enclosed at **Appendix C**.

5.31 Retail capacity modelling follows a consistent, robust methodology which incorporates a number of datasets and informed assumptions which we describe further below, but broadly speaking:

Available Expenditure (£m) - Turnover of Existing & Proposed (£m) = Surplus or Deficit (£m)

5.32 Experian MMG3 census software is used to provide localised expenditure per capita per annum for various forms of retail spending. These figures are then projected forwards based on population growth, changes in expenditure over time and Special Forms of Trading (SFT), such as internet shopping.

5.33 The turnover of existing retailers across the Study Area is calculated based on average sales densities, or turnover, per square metre. Various retail planning sources provide average (or benchmark) sales densities for all national multiple retailers.

5.34 The surplus or deficit equates to the difference between the available retail expenditure across the Study Area and the turnover of existing facilities within the Study Area. If the total turnover is greater than the available expenditure, then the model would identify an oversupply of existing retail floorspace, whilst a surplus of expenditure would suggest capacity for additional retail floorspace.

5.35 Once the surplus or deficit of expenditure is calculated, it is then presented in floorspace figures (using average sales density assumptions) in order to demonstrate the findings within a ‘real world’ context. Often, surplus figures are presented under a number of different scenarios representing various retailers. For example, discount retailers (such as

Aldi and Lidl amongst others) continue to operate at a lower sales density than the 'big 4' (Sainsbury's, Tesco, Asda, and Morrisons). Given the same available 'pot of expenditure', a higher sales density would result in a lower floorspace capacity than a lower sales density, which would result in a higher floorspace capacity.

5.36 Turning now to our detailed findings for the City, as detailed in Figure 5.22 above, the household survey results show that facilities within the City have a 24.8% convenience goods market share of all spending carried out by residents of the Study Area.

5.37 In keeping with standard retail study methodology, when assessing the capacity for new convenience retail floorspace, we adopt a constant market share, in line with findings of the latest household survey (i.e. that stores within the City will continue to draw 24.8% of all convenience goods spending from the Study Area). We consider that maintaining a constant market share provides a sensible basis for analysis given the relative lack of planned developments across the Study Area. In coming to this view, we have analysed the level of commitments identified through correspondence with Council officers in the City.

5.38 Based on a constant market share, we then allow for growth in retail expenditure over the period to 2036, as well as utilising data provided within the latest Experian Retail Planner Briefing Note 19, in order to take account of forecast growth in retail efficiencies (for example, through the adoption of new technologies and more efficient use of available floorspace). Floorspace efficiencies are estimated to have a greater impact on comparison retailers than convenience retailers over the plan period as the rise of food discounting and disruptions to logistics continue to subdue projected efficiencies in turnover of existing convenience retail floorspace.

5.39 We go on to make a number of statistical assumptions through the quantitative capacity exercise in order to account for the following variables. These are contained at Tables 5a-5c of Appendix C and can be summarised as:

a. Utilising a 'goods based' approach, we strip out expenditure for non-food comparison goods such as clothing, household goods, CDs, DVDs and other media that are now commonly sold at major foodstores so that only the convenience goods floorspace is being considered (i.e. on a like-for-like basis with available convenience expenditure). These deductions are made in line with floorspace figures sourced from publicly available databases or, where data is not available, Nexus' professional judgement based on site visits.

b. We also make assumptions as to the gross to net convenience goods sales floorspace of each store, again utilising online planning records where available, national rates databases or Nexus' professional judgement.

c. Finally, we consider whether foodstores are likely to attract any additional 'inflow' from outside of the Study Area. In this instance, we have included an assumption that all stores in the County will experience a 2% inflow from beyond the Study Area, based on the results of the NEMS survey and our professional judgement.

5.40 We then go on to calculate the anticipated turnover of all major convenience goods operators based on the published company sales data, referred to as 'benchmark' turnover. 'Benchmark' turnover is calculated from national average 'sales densities' (turnover per square metre). By comparing the turnover estimates derived from the findings of the household survey (total available expenditure distributed on the basis of each destinations market share) to the benchmark turnovers, we are able to establish where stores are trading above (overtrading) or below (under-trading) company averages.

5.41 Based on the household survey, the City's convenience retailers' turnover is estimated to be £890.2m at 2022. This is projected to increase to £889.7m in 2025, £891.7m in 2030, and £900.7m in 2036 (see Table 5b of Appendix C). This represents a 1.2% growth – the limited growth is a factor of the growth rates forecast by Experian (which flat-line for convenience goods in the medium-term), alongside relatively slow population growth across the Study Area.

5.42 Set against these expenditure forecasts, we deduct for extant convenience goods commitments. These are set out at Table 5d of Appendix C. This includes any developments that have not been built, are currently under construction, or have opened or would not have been operating at the time of the household survey. We do not take into account proposed allocations for retail floorspace, but consider development proposals for which a formal planning application has been approved. In total, these committed developments equate to a net 14,988 sq m of convenience goods floorspace and an estimated turnover of £121.7m at 2022 (see Table 5d at Appendix C). The commitments are then projected forwards and deducted from the gross surplus expenditure.

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

Figure 5.43.1 **Gross Convenience Goods Surplus Expenditure in the County**

Year	Survey Derived Turnover (with Inflow) (£m):	Total Forecast "Benchmark" Turnover (£m)	(Gross) Available Expenditure before commitments (£m)	Turnover of all committed floorspace (£m)	(Net) Surplus Expenditure (£m)
2025	£889.7	£1,224.2	-£334.5	£123.9	-£458.4
2030	£891.7	£1,227.9	-£336.2	£124.3	-£460.5
2036	£900.7	£1,227.9	-£327.1	£124.3	-£451.4

Source: Table 6a, Appendix C

5.44 Using average sales densities to calculate a minimum floorspace scenario (a large supermarket operator) and a maximum floorspace scenario (a combination of discount foodstores operators), we go on to calculate the net additional convenience goods capacity for the County – see the figure below. Overall, there is negative capacity for convenience floorspace, whereby the quantitative capacity for the County as a whole is calculated to be between --44,755 sq m and -32,907 sq m net in 2036. We explore the implications of this very extensive negative capacity for convenience floorspace in Section 10.

Figure 5.44.1 **Net quantitative 'capacity' for new convenience goods in the County**

Year	Surplus Expenditure (£m)	Total Capacity in the City (sq m net)		
2025	-£458.4	-45,586	to	-33,518
2030	-£460.5	-45,654	to	-33,568
2036	-£451.4	-44,755	to	-32,907

Source: Table 6a, Appendix C

Comparison Goods Findings

Market Shares

5.45 Turning to consider comparison goods, we examine market shares across the range of categories defined by Experian. These eight categories cover all ranges of bulky and non-bulky items. The full results of our market shares analysis are set out in Tables 7-18 of **Appendix C**.

5.46 To begin with, we look at the overall comparison goods spending by residents across the Study Area. The results show that destinations in the City account for 38.6% (£2,197.1m) of the spending of all Study Area residents in 2022. The spending is predominantly split between locations outside the City (61.4%), followed by in-centre spent (22.7%) of which the majority is drawn by Cardiff City Centre (21.4%); and out-of-centre locations are attracting 16.0% of the spend.

5.47 Looking at the Inner Study Area in isolation, which broadly equates to the City boundary (Zones 1 to 5), destinations in the City account for 49.8% of the spending of Inner Study Area residents in 2022. The majority of this spending is carried out in designated centres (49.8%) with Cardiff City Centre being the main attraction (45.4%). Out-of-centre locations draw 37.6%, with the biggest attraction being the Newport Road area (11.3%), Cardiff Bay Area (6.3%) and Cardiff Gate Retail Park (6.1%). The remaining 12.5% of spending is carried out at destinations beyond the City, with the most popular locations being Culverhouse Cross (South Side), which is located immediately adjacent to the County boundary.

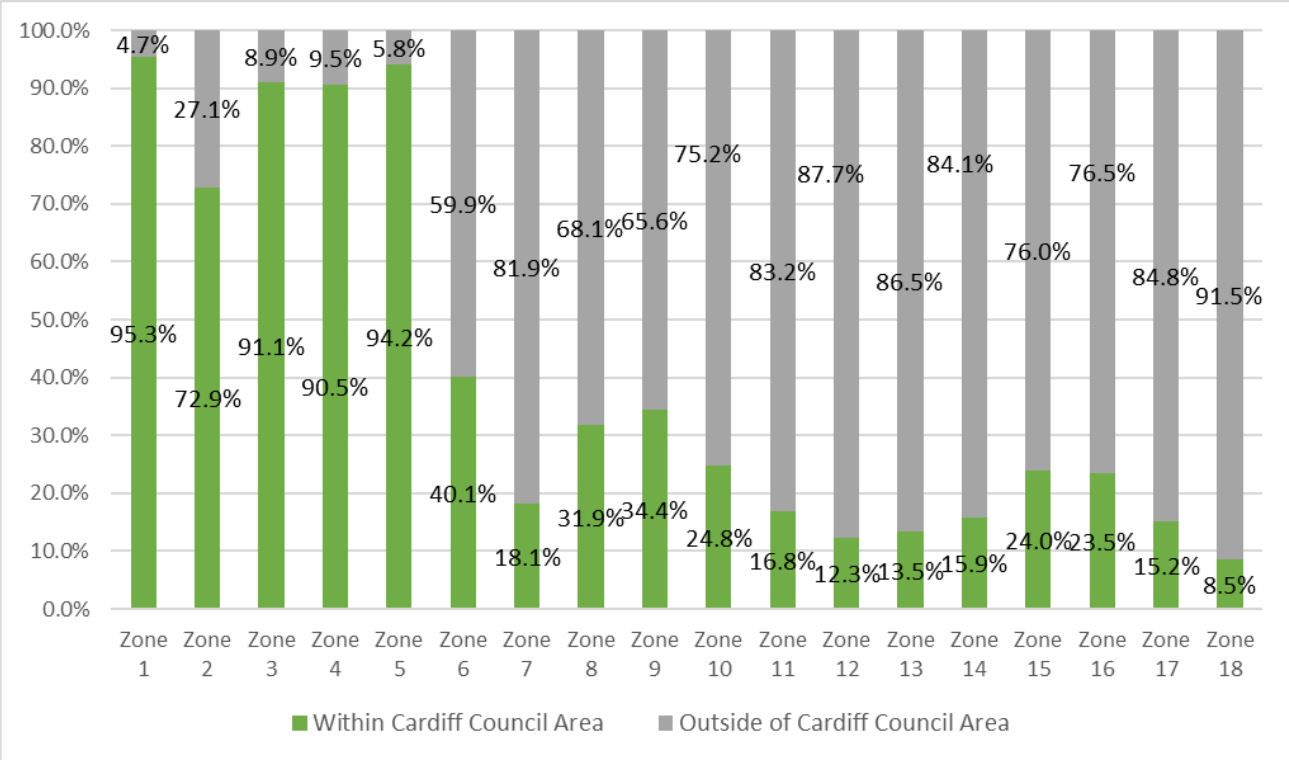
Figure 5.47.1 - **Comparison Goods Market Share, by Destination**

Destination	Inner Study Area (£m)	Inner Study Area (%)	Total Study Area (£m)	Total Study Area (%)
Within Cardiff Council Area	**£1,237.8**	**87.5%**	**£2,197.1**	**38.6%**
In Centre	**£705.1**	**49.8%**	**£1,289.0**	**22.7%**
Cardiff CC	£642.8	45.4%	£1,216.5	21.4%
All Other Centres	£62.3	4.4%	£72.5	1.3%
Out of Centre	**£532.7**	**37.6%**	**£908.1**	**16.0%**
Newport Road Area	£159.5	11.3%	£183.9	3.2%
Cardiff Bay Area	£88.6	6.3%	£219.8	3.9%
Cardiff Gate Retail Park	£86.2	6.1%	£146.5	2.6%
Capital Retail Park	£56.5	4.0%	£153.7	2.7%
Culverhouse (North Side), Cardiff	£32.0	2.3%	£50.7	0.9%
Excelsior Estate	£27.9	2.0%	£32.1	0.6%
Other Out of Centre Destinations	£81.8	5.8%	£121.3	2.1%
Outside of Cardiff Council Area	**£177.4**	**12.5%**	**£3,490.8**	**61.4%**
Culverhouse Cross (South Side), Cardiff	£88.3	6.2%	£199.3	3.5%
Talbot Green/ Pontyclun/ Llantrisant	£15.0	1.1%	£211.8	3.7%
Newport	£14.8	1.0%	£469.3	8.3%
Other Destinations Outside of Cardiff Council Area	£59.3	4.2%	£2,610.4	45.9%
TOTAL	£1,415.2	100.0%	£5,687.9	100.0%

Source: Table 16, Appendix C

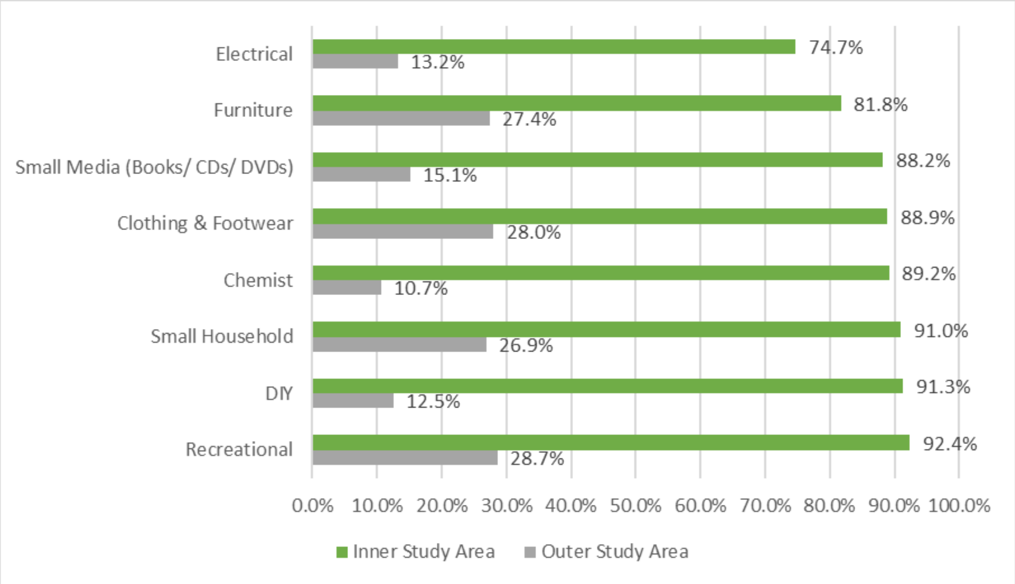
5.48 We are also able to examine the location of comparison goods spending within each Zone. The figure below examines the amount of comparison goods spending carried out inside and outside the Cardiff City area. As would be expected, the survey findings show that the majority of comparison goods spending is retained within the City in the Inner Study Area; albeit, in keeping with the convenience goods findings, the retention of residents in Zone 2 is slightly lower (72.9%), with the majority of the 'leaked' trade going to Culverhouse Cross (South Side). The inflow of trade from Zones 5 to 18 averages around 21.5% of all spending, with Bridgend and Newport being the top alternative destinations.

Figure 5.48.1 **Comparison Goods Market Share by Zone**



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

Figure 5.49.1 **Comparison Goods Market Share by Goods Category**



5.50 The survey results show that there is some variance between spending on different goods categories, as well as between different the Outer Study Area and the Inner Study Area. Looking at the figures for the Inner Study Area, the amount of spending carried out within the City varies from 74.7% of spending on electrical goods, to 92.4% of spending on recreational goods. It should be noted that, relative to all parts of the UK, these are high levels of retention across the board. The residents of the Outer Study Area (Zone 6 to 18), look to the County area primarily for recreational goods, clothing & footwear, furniture and small household goods.

5.51 Looking at the market shares of the Inner Study area, the table below sets out the top destinations to shop for each good category. It is evident that Cardiff City Centre is the preferred location to purchase the majority of goods categories.

Figure 5.51.1 **Top Comaprision Destinations (for residents of the Inner Study Area)**

Type of Goods	Locations in the County Area
Chemist	Cardiff City Centre
Clothing & Footwear	Cardiff City Centre
DIY	Cardiff Gate Retail Park and Culverhouse Cross (North Side)
Electrical	Newport Road Area and Cardiff City Centre
Furniture	Cardiff City Centre
Recreational	Cardiff City Centre
Small Household	Cardiff City Centre
Small Media (Books/ CDs/ DVDs)	Cardiff City Centre

Comparison Goods Capacity

5.52 The methodology for calculating capacity for comparison goods floorspace differs from that used to model capacity for convenience goods floorspace. The principal reason for this is that there are no robust, industry standard, benchmark sales densities for calculating the turnover of smaller independent retailers that typically make up the majority of the comparison provision of town centres (although it is noted that sales densities are published for national multiple comparison retailers). Moreover, the trading levels of comparison retailers can fluctuate significantly depending on a number of localised variables, most notably the location of the retailer relative to similar providers (as customers are more likely to link multiple comparison goods trips to retailers in close proximity to each other).

5.53 As such, we adopt the approach that comparison goods retailers across the Study Area are trading 'at equilibrium' at 2022, meaning we adopt the survey derived turnover of each facility and examine capacity by measuring the growth in available expenditure to 2036. For the purposes of our assessment, we have assumed that the City's attraction to Study Area residents will remain constant at 38.6% of all spending proportionate to population growth (Table 17a of Appendix C). Based on the limited scale of planned developments inside and nearby the Local Authorities, we consider this a robust basis for analysis. The survey turnover is then adjusted to account for inflow from outside of the Study Area, per Nexus professional judgment (at 2%). The difference between the survey derived turnover figure and the benchmark turnover is the gross comparison goods available expenditure.

5.54 We then consider committed and extant planning permissions for new comparison retail floorspace across the Study Area that are likely to come forward over the plan period, again informed by our discussions with Council officers. This includes any developments that are currently under construction, or would not have been operating at the time of the household survey. In total, these committed developments equate to a net 8,922 sq m of comparison goods floorspace and an estimated turnover of £42.8m at 2022 (see Table 17c at Appendix C). The commitments are then projected forwards and deducted from the gross surplus expenditure. The figure below sets out the resultant net comparison goods capacity forecasts over time, whereby by 2036 there will be -£71.1 of comparison expenditure capacity.

Figure 5.54.1 **Gross Comparison Goods Surplus**

Year	Survey Derived Turnover (with Inflow) (£m):	Benchmark Turnover (£m)	(Gross) Available Expenditure before commitments (£m)	Turnover of all committed floorspace (£m)	(Net) Surplus Expenditure (£m)
2025	£2,377.1	£2,394.6	-£17.5	£45.8	-£63.2
2030	£2,667.0	£2,690.8	-£23.8	£51.4	-£75.2
2036	£3,127.1	£3,138.8	-£11.7	£60.0	-£71.7

Source: Table 18a, Appendix C

5.55 We are then able to calculate the net comparison goods capacity floorspace for the City, as shown in the figure below. By 2036 we estimate there will be between -14,621 sq m net and -9,304 sq m net of comparison floorspace capacity across the City. This is obviously a very significant negative capacity and we examine the policy implications of this in Section 10.

Figure 5.55.1 **Net quantitative 'capacity' for new comparison goods in the County**

Year	Surplus Expenditure (£m)	Total Capacity in the County (sq m net)		
2025	-£63.2	-16,907	to	-10,759
2030	-£75.2	-17,902	to	-11,392
2036	-£71.7	-14,621	to	-9,304

Source: Table 18a, Appendix C

Leisure Goods Findings

5.56 The results of the NEMS Household Telephone Survey offer an indication of locations/facilities where residents of the Study Area satisfy their leisure (namely Indoor Health & Fitness, Cinema, Restaurant, Pubs/Bars/Nightclubs, Ten pin bowling, Casino) and cultural needs. As such, the survey enables us to analyse patterns of travel and potential deficiencies (those that are qualitative in nature) within the Council area.

5.57 The modelling of future commercial leisure needs cannot necessarily be based upon the same quantitative model used to estimate retail need. This is because leisure spending is not undertaken regularly and is often influenced by cultural shifts and technological advances.

5.58 Nevertheless, we appraise the existing provision of leisure facilities across the Council area and compare this against recognised sector 'standards' or 'benchmarks'. The completion of this 'benchmarking exercise' allows us to establish deficits and where gaps in the provision of existing facilities may be.

Existing Market Shares

5.59 The NEMS Household Survey asked respondents to describe their leisure and cultural activities and habits. The responses to these questions (Questions 34-43) inform our understanding of leisure trends and needs. The breakdown of the answers to these questions is set out in full at **Appendix B** and we extrapolate the key results here.

5.60 In the first instance, it is important to have an understanding of the participation rates and general popularity of leisure activities across the Study Area. In Question 34 of the Household Survey, NEMS asked respondents to identify all of the leisure activities in which they participated (respondents were allowed to identify as many options as they wished). We summarise the results for Zones 1-5 which broadly comprise the Council area (i.e. the 'Inner Study Area') in Figure 5.20.1.

Figure 5.60.1 **Participation in Leisure Activities (%)**

Leisure Activity	Zone 1 – Cardiff Central	Zone 2 – Cardiff West	Zone 3 – Cardiff North	Zone 4 – Cardiff East	Zone 5 – Cardiff South	Inner Study Area
Indoor Health & Fitness	19.4%	20.1%	27.6%	18.6%	25.8%	**22.2%**
Cinema	42.2%	41.9%	46.2%	37.4%	36.6%	**41.1%**
Restaurant	67.0%	72.0%	72.7%	69.1%	67.7%	**70.0%**
Pubs/Bars/Night clubs	54.3%	57.3%	52.5%	50.3%	39.1%	**51.5%**
Ten pin bowling	12.0%	7.7%	8.9%	6.6%	9.8%	**8.8%**
Casino	0.0%	3.9%	1.2%	2.5%	1.2%	**1.9%**
Cultural Activities	51.0%	56.8%	56.9%	40.3%	45.8%	**50.6%**

Source: Appendix B. Question 34 of NEMS Household Survey

5.61 As evident in the figure above, the most popular leisure activity across the Council area is to go to a restaurant, which 70.0% of residents indicated they do on at least an occasional basis. The second most popular activity is visiting pubs/bars/nightclubs (51.5%), closely followed by visits to cultural facilities such as theatres/museums/art galleries (50.6%). Visiting casinos (1.9%) is the least often undertaken activity, followed by ten-pin bowling (8.8%).

5.62 Generally speaking, leisure participation rates are around average when compared to our studies across the UK as a whole. Restaurant-going and visits to cultural facilities are both though slightly higher than the average, no doubt reflecting the availability of a wide range of such facilities in the capital city. Indoor health and fitness participation rates are slightly below our observed average.

5.63 There were no significant differences in participation rates between Zones overall. However, broadly speaking, residents in Zone 3 (Cardiff North) are more likely to participate in leisure activities than elsewhere, with the highest level of participation for health & fitness, cinema-going, restaurant-going and cultural activities. Meanwhile, residents in Zone 5 (Cardiff East) are marginally less likely to participate in leisure activities than counterparts elsewhere in the City.

5.64 NEMS also asked a series of questions to understand where residents usually undertake their chosen leisure activity. We examine the most popular destinations for residents of the Council area in the figure below. Again, we only consider here the results for Zones 1-5 of the Study Area (i.e. the Inner Study Area).

Figure 5.64.1 **Most Popular Leisure Destinations – Residents of Zones 1-5 (%)**

Leisure Activity	First Choice	Second Choice	Third Choice
Indoor Health & Fitness	JD Gyms, Llanishen (10.0%)	Fairwater Leisure Centre (8.8%)	Puregym, Cardiff Bay (5.7%)
Cinema	Cineworld, City Centre (26.9%)	Odeon, Cardiff Bay (18.1%)	Showcase, Nantgarw (14.2%)
Restaurant	Cardiff City Centre (51.4%)	Cardiff Bay (8.9%)	Whitchurch Centre (7.9%)
Pubs/Bars/Nightclubs	Cardiff City Centre (48.5%)	Whitchurch Centre (4.8%)	Canton Centre (4.2%)
Ten pin bowling	Hollywood Bowl, Cardiff Bay (67.0%)	Tenpin, Nantgarw (21.6%)	Superbowl, City Centre (11.4%)
Casino	Grosvenor, Fairwater (52.6%)	Les Croupiers, Leckwith (26.2%)	Others, Cardiff City Centre (21.2%)
Cultural Activities	Donald Gordon Theatre, Cardiff Bay (27.1%)	New Theatre, Cardiff City Centre (21.7%)	Museum of Cardiff, Cardiff City Centre (15.0%)

Source: Appendix B. Questions 35-41 of NEMS Household Survey

5.65 As expected, the results highlight the pre-eminence of Cardiff City Centre as the preferred destination in a number of leisure categories, particularly those related to the evening economy (cinema, restaurants, pubs, bars, nightclubs, theatres and museums). Outside the City Centre, Cardiff Bay, Fairwater and Nantgarw show up as important destinations for a range of leisure activities.

5.66 There is minimal 'leakage' of leisure activity trade by residents of the city to destinations outside its boundaries. The only notable level of trips being undertaken elsewhere are for ten-pin bowling and cinema-going, both predominantly to Nantgarw.

Need for Additional Leisure Facilities

5.67 Question 43 of the Household Survey found that over half of all respondents across the Council area (57.5%) did not identify any leisure facilities which they wished to see more. This suggests that residents are largely happy with the provision of facilities. Such a response is slightly higher than our survey average across the UK.

5.68 In the figure below, we isolate the responses for each Zone of the Inner Study Area in order to identify what the main requests for new leisure facilities were from residents in each area, and whether there are any easily identifiable gaps in provision. More than one suggestion was allowed.

Figure 5.68.1 **Leisure Activities residents want to see more of (%)**

Leisure Activity	Zone 1 – Cardiff Central	Zone 2 – Cardiff West	Zone 3 – Cardiff North	Zone 4 – Cardiff East	Zone 5 – Cardiff South	Total Inner Study Area
More children's activities	1.3%	10.0%	10.3%	8.4%	4.6%	**7.3%**
More bars/pubs	8.3%	5.3%	1.7%	10.1%	9.2%	**6.7%**
Swimming pool	9.8%	6.8%	2.7%	7.0%	7.3%	**6.5%**
Better shopping facilities	7.5%	3.5%	7.6%	5.8%	7.6%	**6.3%**
More restaurants	1.7%	4.7%	7.3%	8.8%	6.2%	**5.8%**

Source: Appendix B. Question 43 of NEMS Household Survey

5.69 The results show that there is no particularly notable request for any one item in any of the Zones, although there is a suggestion that children's leisure activities could be better provided for in the suburbs of the city, and that a greater range of restaurants, bars and pubs is sought to the east of the City. Broadly speaking though, residents within the City area are happy with their provision of leisure facilities.

5.70 Despite a broad picture of residents being content with their leisure provision, this does not mean though, that qualitative or quantitative improvements might not be welcome in all areas of the City. We examine below the scale of capacity which might arise by the end of the Plan period in 2036.

Capacity for Additional Leisure Facilities

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

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

Health and Fitness Capacity

5.73 The Leisure Database Company[22] (May 2019) identify that the level of health and fitness clubs in the UK is higher than it has ever been before, with more clubs and more members. In terms of membership rates across the whole of the UK, the Leisure Data Base Company outlines that 15.6% of the UK's population are registered members at private health and fitness clubs meaning that 1 in every 7 people is a member of a gym. In 2019, there were in the region of 7,239 health and fitness clubs operating across the UK (up from 7,038 in 2018). The biggest area of growth has come from low-cost gyms, which account for over 35% of memberships in the private sector.

5.74 In 2016, Statista reported that the average size of mainstream gym, health-club and leisure centre membership in the UK was approximately 5,250 members per club. Building on this, our household survey results showed that approximately 22.2% of residents in the Inner Study Area participate in health and fitness activities (Q34). Of those, the survey results suggest that around 90.1% of residents currently carry out their health & fitness activities within the City Area itself (Q35). We term this the 'Citywide retention rate', and use it as a benchmark (assumed to be constant) to underpin our assessment of the number of additional facilities that can be supported in the City over time.

5.75 In the figure below we identify that the Inner Study Area has a population of 357,575 at 2022, which is set to increase to 360,044 by 2025, to 362,582 by 2030 and to 365,168 by 2036. Based on the current participation rates, attraction rates, and average club size membership identified above, we calculate that the City's residents would support around 14 large indoor health and fitness centres over the Plan period.

Figure 5.75.1 **Health & Fitness Centre Capacity**

Year	Inner Study Area Population	Regular Participants @ 22.2%	Citywide Retention Rate @ 90.1%	Average Membership	No. of Clubs Supported in the City
2022	357,575	79,382	71,523	5,250	**13.6**
2025	360,044	79,930	72,017	5,250	**13.7**
2030	362,582	80,493	72,524	5,250	**13.8**
2036	365,168	81,067	73,042	5,250	**13.9**

5.76 Comparing capacity to supply, the results to Question 35 of the household survey showed that there are actually as many as 40 recognised indoor health and fitness facilities within the City. Whilst some of those will be smaller entities, a significant number are either nationally recognised chains (18 no.) or Council-operated leisure centres (9 no.). Therefore, the supply of 27 larger indoor health and fitness facilities, plus a number of other facilities linked to the universities, is observed to be plentiful choice for the residents of the City. It is also reflective of the 'draw' of the City for residents living outside of its boundaries. Notably in this respect, 33.4% of residents in Zone 6, 28.4% of residents in Zone 9, and 24.2% of residents in Zone 16, utilise facilities within the Cardiff City area for their indoor health and fitness activities.

5.77 The qualitative results of our survey (Figure 4.78.1) point towards plentiful supply of health and fitness facilities in the City to meet its residents needs, as well as an element of the needs of those travelling from beyond. We also note there

[22] State of the UK Fitness Industry 2019, Leisure Database Company, May 2019

were relatively few calls for any new leisure centres (4.0% of residents) or gymnasiums (3.4%) under Question 43 of the household survey.

5.78 We therefore recommend that the Council remains welcoming of commercial competition in general, not least because of the health and well-being benefits for residents, but that there is unlikely to be a requirement to allocate any specific site for this purpose, notwithstanding population growth.

Cinema Capacity

5.79 The City has six mainstream cinemas, providing a total of 46 screens. This comprises the Cineworld (15 screens), Premier (5 screens) and Vue (7 screens) in the City Centre, as well as Odeon (12 screens) and Everyman (5 screens) in Cardiff Bay, and Chapter in Canton (2 screens).

5.80 The NEMS Household Survey outlines that these six cinemas attract 71.6% of all cinema trips made by residents of the City area (Question 36).

5.81 In 2019 (before the impact of Covid-19 on the cinema industry), the UK Cinema Association identified that total UK cinema admissions were 176.1 million, equating to 2.7 trips per person. They also identified 840 cinema facilities with 4,564 screens in the UK, equating to 937,161 cinema seats in the UK. Based on this data, the UK yearly average was 38,585 cinema trips per screen.

5.82 As shown in the figure below, in order to gauge the number of cinema screens that can be supported in the City over the Plan period, we have calculated the anticipated cinema attendance (based on the national average of 2.7 trips per person). We also account for the City's current cinema trip attraction rate and assume that this will persist over the Plan period.

Figure 5.82.1 **Cinema Screen Capacity**

Year	Inner Study Area Population	Cinema Visits per Person	Total Cinema Attendance	Citywide Retention Rate @ 71.6%	Trips per Screen	Cinema Screens Supported
2022	357,575	2.7	965,453	691,264	38,585	17.9
2025	360,044	2.7	972,119	696,037	38,585	18.0
2030	362,582	2.7	978,971	700.944	38,585	18.2
2036	365,168	2.7	985,954	705,943	38,585	18.3

5.83 Our benchmarking exercise suggests that the current provision of 46 screens is more than sufficient to serve the needs of the resident population to the end of the Plan period, as well as no doubt the needs of an extensive catchment form beyond. Notably, cinemas in Cardiff attracted 87.1% of all cinema trips made by residents in Zone 6, as well as more than 20% of trips made by residents in each of Zones 7 and 8.

5.84 We also note that our quantitative findings showed relatively little discontent with existing provision, with just 3.9% of respondents in the inner study area requesting additional cinema facilities (Question 43).

Ten-Pin Bowling Capacity

5.85 Ten-pin bowling has generally experienced a decline over the last decade, with a gradual reduction in the number of facilities. In 2014, Mintel identified that there were 5,617 bowling lanes[23], a decrease since 2011 where 5,773 bowling lanes were identified[24]. More recent data from 2021 suggests that this number has declined further to around 3,700 lanes across the UK[25].

5.86 Taking into account the UK population at the time this latest data was produced (67.1 million[26]), this equates to one lane for every 18,135 persons.

5.87 There are two dedicated ten-pin bowling facilities in Cardiff; the 12-lane Superbowl in the City Centre, and a 26-lane Hollywood Bowl in Cardiff Bay.

5.88 The Hollywood Bowl facility attracts 67.0% of all trips made by residents of the City, with the smaller Superbowl facility accounting for 11.4% of all trips.

Figure 5.88.1 **Bowling Lane Capacity**

Year	Inner Study Area Population	Population per Bowling Alley	Lanes Supported
2022	357,575	18,135	19.7
2025	360,044	18,135	19.9
2030	362,582	18,135	20.0
2036	365,168	18,135	20.1

5.89 The figure above indicates that, based on the assumed benchmark, the City's population supports around 20 lanes over the Plan period. On this basis, the current supply of 38 lanes across the two facilities is ample and will also account for some degree of attraction from beyond the city boundary. To this end, the majority of residents in Zones 6, 11 and 12 are all attracted to Cardiff for their ten-pin bowling activities.

Restaurants, Pubs, Bars and Café Capacity

5.90 We have undertaken an assessment of the potential capacity for additional food and beverage floorspace across the City, utilising current market shares as identified through the Household Survey, population and spending growth rates and benchmarking against current levels of provision.

5.91 This exercise identifies the future spending available to support additional food and beverage floorspace (in the form of restaurants, pubs, bars, café etc.) over the Plan period to 2036. This approach is not prescriptive, but instead provides an

[23] Ten-pin Bowling – UK' Mintel, May 2014
[24] 'Ten-pin Bowling – UK', Mintel, November 2011
[25] www.gotenpin.co.uk/about
[26] As identified by the Office for National Statistics' Population Estimates for the UK

indication of the scope for future development to be supported, in addition to the findings of the assessments of the key centres.

5.92 Experian provides localised data on spending on restaurants and cafés per capita, which includes spending on alcoholic drinks (away from home) and take-away meals. This spending was shown to be £990 per person per annum[27] for residents in the Inner Study Area (2020 prices).

5.93 Taking into account the population growth, and anticipated leisure spending growth rates (Experian Retail Planner 19, Figure 1a), we calculate, in Figure 5.55, a total spend across the Study Area of £535.6m at 2022, increasing to £556.6m by 2025, £590.0m by 2030 and £626.6m by 2035.

5.94 This spending is then attributed to the restaurant, café and bar facilities across the City area. The household survey results (Q37 and Q38) showed that restaurants, cafés, bars and pubs within the City 'retained' 90.7% of their own residents spending.

5.95 Growing the 'benchmark' turnover of facilities from current levels on the basis of 1% per annum to account for growth through extensions and trading efficiencies over the Plan period, we find a total food and beverage spending surplus across the City area of £18.5m by 2025, £46.8m by 2030 and £77.6m by 2036.

5.96 Adopting an average sales density of £5,000 per sq m at 2022 (again, projected to grow in line with a 1% sales efficiency) we calculate the typical restaurant, pub, bar and café floorspace that could be supported by the identified surplus expenditure. This is shown as being up to 8,700 sq m at 2030, increasing to 13,600 sq m by 2036. This should be treated only as a rough guide.

5.97 We are highly cognisant of the fact that the recent pandemic will have resulted in the closure of a large amount of restaurant, bar and café floorspace across the City. In addition to the pandemic, there has also been significant increases to business costs including energy and transport. Whilst our figures show that there is likely to be a substantial pent-up consumer demand for additional spending this area, this does not mean that all of that demand should be met through new floorspace. The potential re-occupation of vacant floorspace should be accounted for in the first instance. The Council should also account for any existing committed leisure developments in this respect.

Figure 5.97.1 **Restaurant, Pubs, Bars and Café Spending**

Year	Inner Study Area Population	Spend Per Capita	Total Spend	Citywide Retention Rate @ 90.7%	Growth in Spending	Benchmark Growth	Residual Spending
2022	357,575	£1,498	£535.6m	£485.8m	-	-	-
2025	360,044	£1,546	£556.6m	£504.9m	£19.1m	£0.6m	£18.5m
2030	362,582	£1,627	£590.0m	£535.1m	£49.3m	£2.5m	£46.8m

27 Notably this is a low mid-pandemic base figure, which is grown substantially by Experian in 2021 (21.9%) and 2022 (24.1%) to reflect coming out of lockdown.

2036	365,168	£1,716	£626.6m	£568.4m	£82.6m	£5.0m	£77.6m

Source: Nexus Analysis

Figure 5.97.2 **Restaurant, Pubs, Bars and Café Capacity**

Year	Residual Spending	Sales Density	Floorspace (sq m)
2025	£18.5m	£5,150	3,600
2030	£46.8m	£5,400	8,700
2036	£77.6m	£5,725	13,600

Source: Nexus Analysis

Other Leisure Uses

5.98 Turning to consider cultural uses (theatre / museum / art galleries), the household survey suggested that the vast majority of Inner Study Area residents look towards Cardiff itself for their cultural activities (95.4% of respondents). This suggest that the city provide well for its won residents, as there is very little evidence of people travelling elsewhere. The survey also established that there was a low level of demand for additional/improved facilities with 1.4% of Inner Study Area respondents suggesting that they would like to see more/better concert halls come forward, 1.6% suggesting new/better Theatres, and 3.0% suggesting they would like to see more museums or art galleries.

5.99 As previously highlighted, the survey results did though show some level of demand for the provision of further children's facilities/activities. This may be an area the Council should review in preparation for their emerging Plan.

Leisure – Summary

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

5.101 Nevertheless, on the basis of current economic spending forecasts, our benchmarking assessment does not identify any significant gaps in the provision of existing facilities, and the provision of leisure facilities within the City is seemingly in line with resident expectations and viable operating capacities. The City's leisure operators also clearly provide for a substantial inflow of visitors from beyond its won boundaries.

5.102 Notwithstanding our capacity assessments, there is clearly a level of dissatisfaction with the provision of facilities for children in the City as a whole, and this may be a focus for future Plan policy.

6. Methodology for Town Centre Health Checks

6.1 Health checks are recognised as important planning 'tools' for appraising and monitoring the changes in the overall vitality and viability of town centres and informing both plan-making and decision-taking at the local level.

6.2 In this context, this Study provides detailed health check assessments for the city centre and for all eleven district centres, as directed by our Brief. For the twenty local centres, a more concise health-check assessment is provided.

6.3 The health checks have been carried out in accordance with TAN 4, which sets out a number of key performance indicators used to help assess and monitor the overall health and performance of the centres. The general methodology is set out below.

Retail Composition and Vacancies

6.4 The composition of retail and leisure uses has been compiled from Centre Survey data provided by the Council for ground floor properties, whereby the units surveyed are arranged into the standard Experian Goad categories i.e. convenience, comparison, service uses, and vacant units. Please note that Goad categorisations do not directly correspond with Use Class Order definitions.

6.5 The health checks provide an effective 'gap' analysis tool to help identify retail types and categories that are under or over-represented in centres. This is based on benchmarking against Goad UK averages (Experian Category Report, 2022) for all circa 1,950 centres and shopping locations covered by Experian.

6.6 A full-scale set of plans covering each centre of the current retail hierarchy is contained at Appendix D.

Environmental Quality

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

Accessibility

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

Rental Values

6.9 Rental values have been obtained under license from CoStar.

Commercial Demand

6.10 We have established commercial demand by utilising occupier requirements for the Cardiff area from The Requirements List. For a city area such as Cardiff, these are listed on a city-wide basis. We have therefore included all the listed requirements at Appendix E.

Town Centre Turnover

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

Public Opinion

6.12 NEMS household survey asked a number of qualitative questions about what features of the centres that are most liked, and what features are the most disliked. This data is available for the City Centre and all District Centres.

7. Cardiff City Centre Health-Check

Description

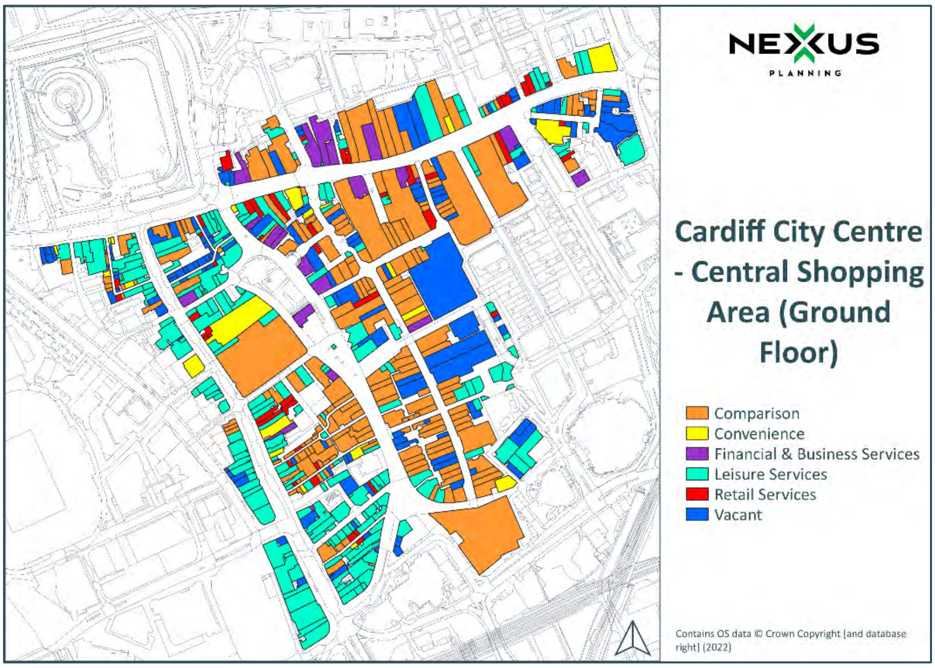
7.1 Cardiff city centre is a large and historic centre, based primarily along three main streets: Queen Street, St Mary's Street and The Hayes. In the city centre there are both large, modern shopping centres such as St David's and Queen's Arcade, which house primarily national retailers, and smaller, historic shopping arcades such as the Royal Arcade and Morgan Arcade, where upmarket, independent retailers can be found. The city centre lies in close proximity to many of Cardiff's landmarks, including Cardiff Castle, the Principality Stadium and Cardiff International Arena.

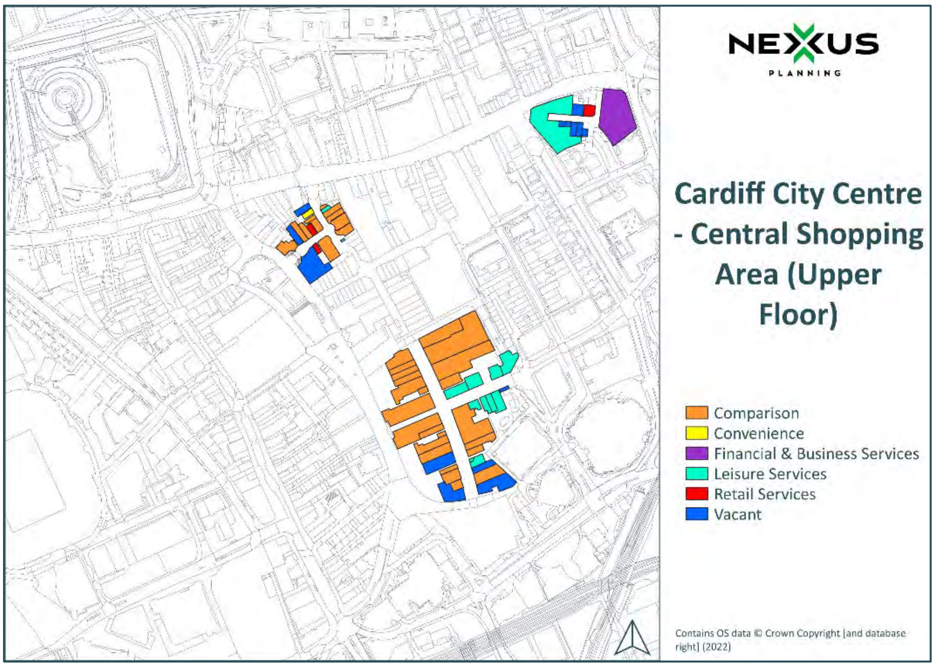
Figure 7.1.1 **Photos of Cardiff City Centre**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 7.1.2 **Cardiff City Centre Composition Maps**





7.2 There are a total of 720 units in the city centre.

7.3 The comparison offer consists of 237 units, which makes up 32.9% of the total offer, which is significantly higher than the UK average. The offer is very diverse in terms of the items on sale and includes both high-end and lower-budget retailers. The centre benefits from two large department stores (John Lewis and House of Fraser), but also a number of small, independent retailers. The strength of the comparison offer was identified by survey respondents as the most popular feature of the city centre.

7.4 Only 3.2% (23) of total units are convenience, which is significantly lower than the UK average.

7.5 Services make up 43.6% (314 units) of the total offer, which is lower than the UK average of 49.8%. Within this category:

a. Retail services make 7.2% (52 units) of the total offer, which is less than half the UK average.

b. Leisure services make up 32.9% of the offer (237 units) which is significantly higher than the UK average. The leisure offer is particularly strong and diverse, with a particular cluster found to the south-west of the centre. The range of cafes and restaurants available in the city centre was identified by survey respondents as a particular strength of the centre.

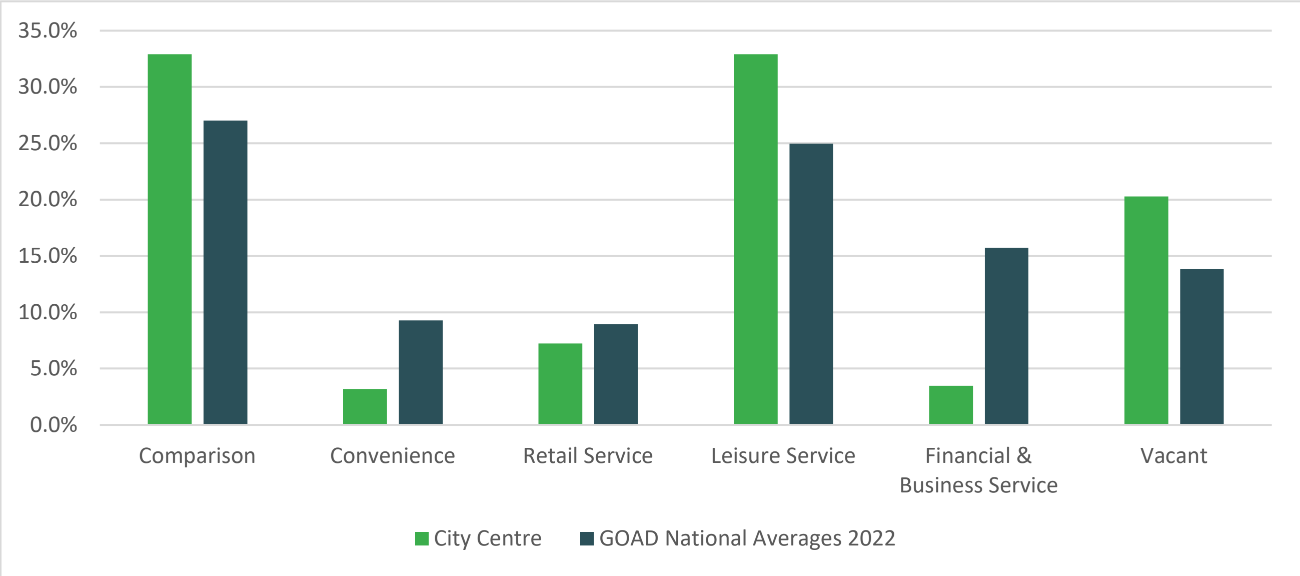
c. Financial & business services make up 3.5% (25 units) of the total offer, which is less than half of the UK average.

7.6 There are 146 vacant units in the city centre. At 20.3% of the total offer, this is significantly higher than the UK average of 13.8%. The most significant vacant property is the former Debenhams store in the St David's Shopping Centre. The Capitol Shopping Centre is also a particular hotspot for vacant units.

Figure 7.6.1 **Cardiff City Centre Composition Table**

Categories	Cardiff City Centre 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	237	32.9%	26.9%
Convenience	23	3.2%	9.3%
Services (Total)	314	43.6%	49.8%
Retail	*52*	*7.2%*	*15.8%*
Leisure	*237*	*32.9%*	*25.2%*
Financial & Business	*25*	*3.5%*	*8.8%*
Vacant	146	20.3%	13.8%
TOTAL	720	100.0%	100.0%

Figure 7.6.2 **Cardiff City Centre Composition Graph**



Environmental Quality

7.7 The environmental quality of the city centre was identified by survey respondents as a particular strength of the centre, though it does vary throughout. Environmental quality is arguably highest in the pedestrianised areas, where streets have an open nature and there is plenty of seating and greenery.

7.8 St David's Shopping Centre is a modern and well-maintained centre. It is clean and benefits from bins and benches throughout. However, vacant units in the centre are not well concealed.

7.9 Capitol Shopping Centre experiences high vacancy levels which detract from the environment. We observed very few shoppers during the site visit, which gave the centre a very quiet feel. Although being a relatively recent development, it feels outdated and not particularly well-maintained.

7.10 Construction near Churchill Way, on the eastern periphery of the central shopping area, currently detracts somewhat from the environmental quality. However, this is part of a wider masterplan to develop a new 'Canal Quarter' in the city and hence once completed this development is likely to boost environmental quality by adding new green and blue public spaces into the city centre.

7.11 The central shopping area also benefits from many historic and characterful buildings within and nearby its boundaries, all of which have been well-maintained and integrate well with their surroundings. The north-west is dominated by Cardiff Castle, which dates back to the 11th century. There are several covered Victorian and Edwardian shopping arcades located between St Mary's Street and the Hayes, including Royal Arcade, Morgan Arcade and High Street Arcade. Other buildings of note in the central shopping area include the Museum of Cardiff, Cardiff Market and Cardiff Central Library.

Perception of Safety

7.12 The centre is generally busy with many pedestrians, which contributes to a feeling of safety, however, homelessness is evident within the centre. A lack of security and safety was identified by survey respondents as one of the biggest problems in the centre.

7.13 In August 2022, there were 334 reported crimes in the Central Shopping Area[28], the most frequent crimes being shoplifting, violence and sexual offences, and anti-social behaviour. Particular hotspots of crime include Duke Street, Quay Street and Queen Street.

Accessibility and Pedestrian Flow

7.14 The city centre is fairly accessible for pedestrians, due in part to the high number of pedestrianised areas. The centre is also fairly compact and easy to navigate, which survey respondents identified as a popular feature of the centre. However, there is a lot of construction on the edges of the central shopping area, which restricts pedestrian movement considerably and forces pedestrians to walk in the road instead of the pavement.

7.15 The majority of survey respondents (62.7%) identified that they travel to the city centre by car. As much of the city centre is pedestrianised and therefore inaccessible by car, there tends to be fairly high levels of congestion at the edges of the central shopping area. Expensive parking and traffic congestion were identified by survey respondents as some of the biggest issues in the centre.

7.16 There are two train stations in proximity to the city centre: Cardiff Queen Street to the west, and Cardiff Central to the south. 22.5% of survey respondents who visit the city centre travel there by train, suggesting that the services are well used.

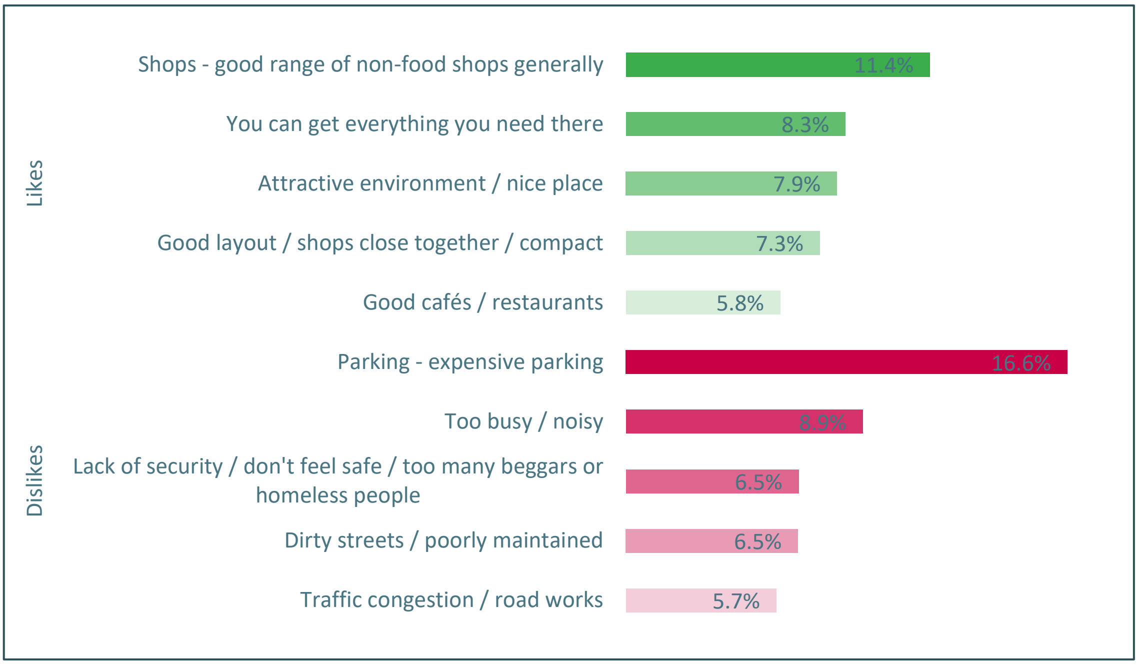
7.17 The city centre is well served by bus connections. 16.3% of survey respondents travel to the city centre by bus.

Public Opinion

7.18 Results from the household survey identified the top "likes" and "dislikes" of the city centre, as seen below.

[28] https://www.police.uk/pu/your-area/south-wales-police/cardiff/?tab=crimemap

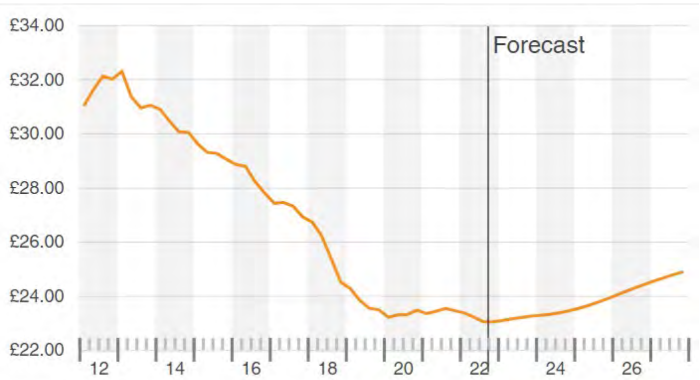
Figure 7.18.1 **Cardiff City Centre Public Opinions**



Rents

7.19 The CoStar Retail Report 2022 identifies the market rent per square foot to be £23.02.

Figure 7.19.1 **Market rent per SF for Cardiff City Centre**



Source: CoStar Retail Report 2022

Centre Turnover

7.20 The table below has been derived from Appendix C. Given the limited number of convenience units, it is not surprising that only 3.5% of all retail spend in the City Centre goes towards convenience goods. Clothing and Footwears shopping is the biggest attraction (35.5%), followed by Small Household Goods (19.0%).

Category	City Centre Turnover (p/a) (from the Study Area)	(%)
Convenience	**£44.7m**	**3.5%**
Comparison	**£1,216.5m**	**96.5%**
Clothing & footwear	£447.2m	35.5%
Furniture goods	£60.1m	4.8%
DIY goods	£7.9m	0.6%
Electrical goods	£100.0m	7.9%
Small Household goods	£239.7m	19.0%
Small Media	£126.3m	10.0%
Chemist goods	£42.4m	3.4%
Recreation goods	£192.9m	15.3%
Total Retail	**£1,261.2m**	

Summary of Key Issues

7.21 Cardiff City Centre's main strengths are the size and diversity of the comparison and leisure services offer, which cater for a wide variety of audiences and budgets.

7.22 Much of the central shopping area has been pedestrianised, which improves the centre's environmental quality and movement of pedestrians, but accessibility outside of these areas is a problem. Congestion is an issue particularly on the outskirts of the central shopping area, and the cost of parking was identified by household survey respondents as the least popular feature of the centre.

7.23 Safety has also been identified as an issue by household survey respondents.

8. District Centre Health-checks

Albany Road/Wellfield Road

Description

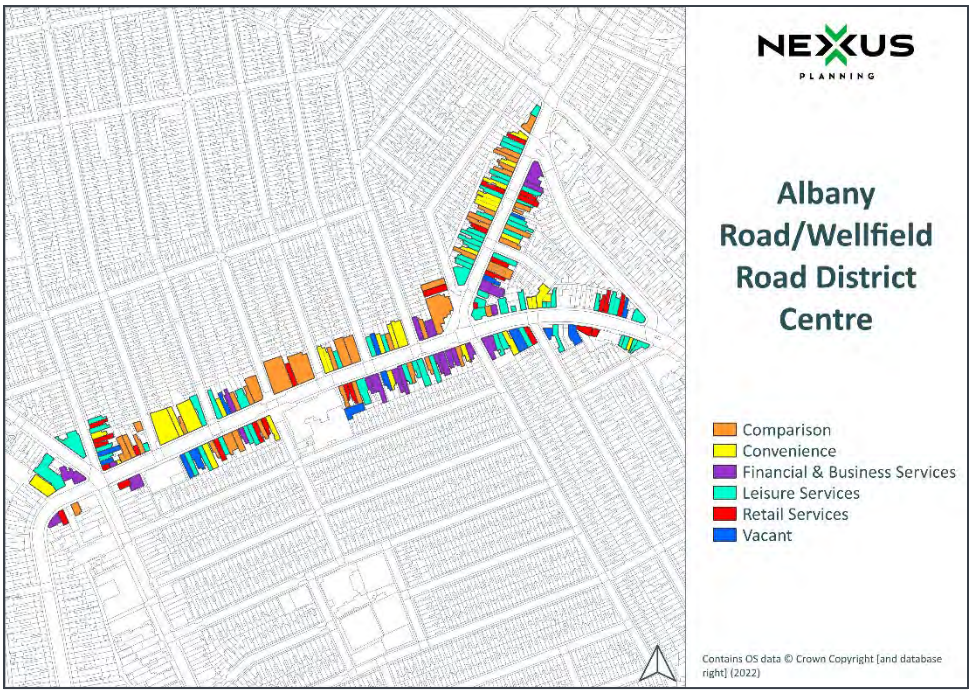
8.1 Albany Road/Wellfield Road is a designated District Centre. It is mostly linear in nature, hosting 194 units occupied by a mixture of national retailers and independents.

Figure 8.1.1 **Photos of Albany Road/Wellfield Road**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 8.1.2 **Albany Road/Wellfield Road Composition Map**



8.2 The comparison offer consists of 42 units, which makes up 21.7% of the total offer, which is lower than the UK average (26.9%). The offer is relatively diverse, including clothes shops, chemists, jewellers, charity shops, toys, and homeware retailers.

8.3 12.9% (25 units) of total units are convenience, which is higher than the UK average (9.3%). This includes two Tesco stores, a Sainsbury's, two ethnic food stores, as well as a number of bakeries, health food stores, convenience stores, a butcher and a greengrocer.

8.4 Services make up 58.3% (113 units) of the total offer, which is significantly above to the UK average (49.8%).

a. Retail services make up 14.4% (28 units) of the total offer, which is slightly lower than the UK average (15.8%).

b. Leisure services make up 32.5% (63 units) of the total number of units, which is significantly higher than the UK average (25.2%). The centre is dominated by leisure uses, which is one of the top "likes" about the centre, according to the household survey.

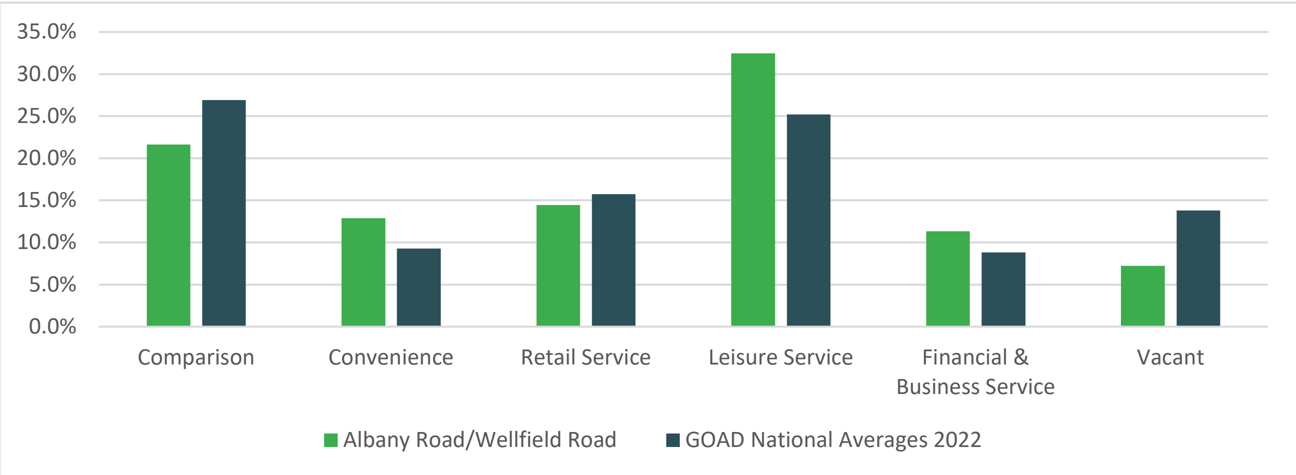
c. Financial & Business Services make up 11.3% (22 units), which is higher than the UK average (8.8%).

8.5 14 units are vacant, 7.2% of the total offer. This is significantly lower than the UK average (13.8%).

Figure 8.5.1 **Albany Road/Wellfield Road Composition Table**

Categories	Albany Road/Wellfield Road 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	42	21.7%	26.9%
Convenience	25	12.9%	9.3%
Services (Total)	113	58.3%	49.8%
Retail	*28*	*14.4%*	*15.8%*
Leisure	*63*	*32.5%*	*25.2%*
Financial & Business	*22*	*11.3%*	*8.8%*
Vacant	14	7.2%	13.8%
TOTAL	194	100.0%	100.0%

Figure 8.5.2 **Albany Road/Wellfield Road Composition Graph**



Environmental Quality

8.6 The quality of environment is average. The centre overall appearance could be improved, with some buildings looking tired and in need of upkeep/repair. Whilst the centre has a number of buildings with notable architectural design, these do not appear to be celebrated and some are in need of better maintenance. Improved cleaning is needed with litter, graffiti and weeds on pavement present – the household survey shows that dirty streets/poor maintenance was the second most common dislike about the centre. The centre is also dominated by parked cars, which takes away from the overall appearance. The centre would also benefit from additional landscaping and greenery.

Perception of Safety

8.7 The centre has a safe feel with no noticeable signs of day-time antisocial behaviour. No noticeable CCTV was present.

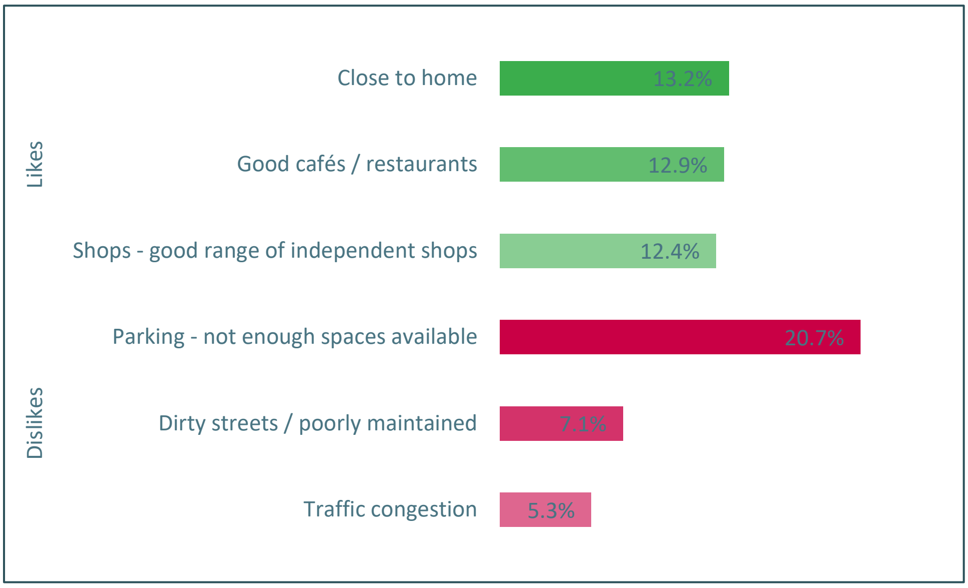
Accessibility and Pedestrian Flow

8.8 The centre is flat, mostly linear and is easy to navigate. However, it has narrow, and in places, uneven pavements which impede pedestrian flow. It is also dominated by traffic, and on-street parking which further impede pedestrian flow. Lack of parking has been identified by the household survey as the top issue. Wellfield Road benefits from a cycle lane. Some cycle parking is also present throughout the centre.

Public Opinion

8.9 Results from the household survey identified the top "likes" and "dislikes" of the city centre, as seen below.

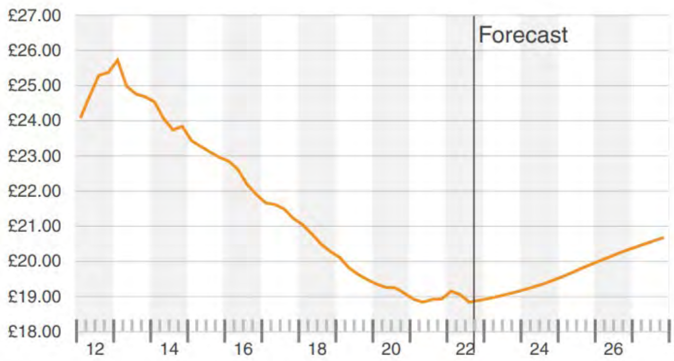
Figure 8.9.1 **Albany Road/Wellfield Road Public Opinion**



Rents

8.10 The CoStar Retail Report 2022 identifies the market rent per square foot to be £18.83.

Figure 8.10.1 **Market rent per SF for Albany Road/Wellville Road**



Source: CoStar Retail Report 2022

Summary of Key Issues

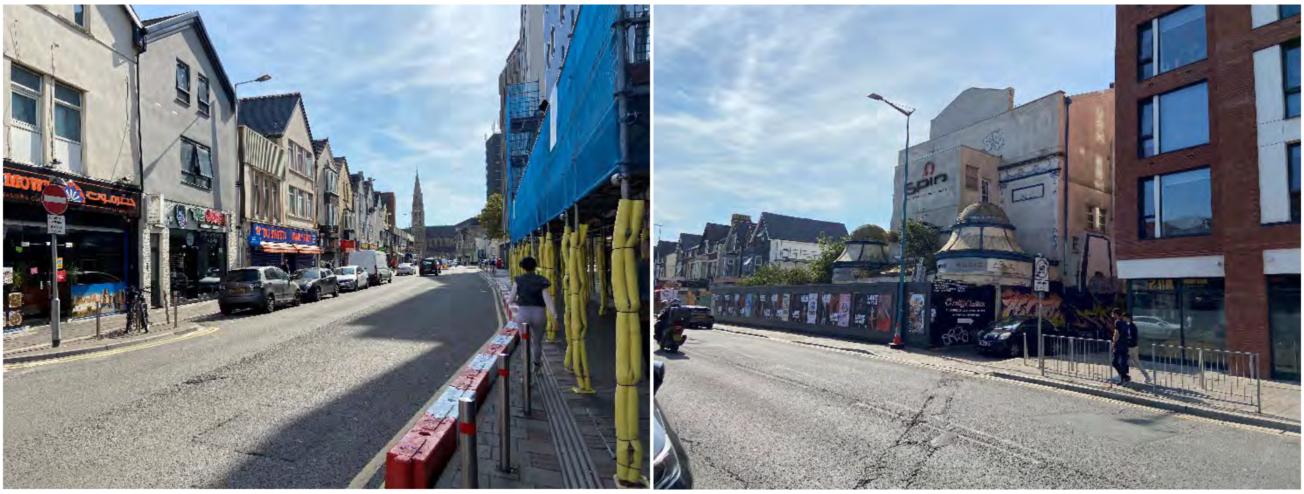
8.11 Albany Road/Wellfield Road District Centre has a strong convenience and leisure offer; and the vacancy levels are low. However, its environmental quality is in need of improvement in terms of street cleaning and façade maintenance, as well as more landscaping. Lack of parking and car dominance is also a concern. The centre would benefit from a public realm and movement strategy.

City Road

Description

8.12 City Road is a district centre. It is linear in nature and hosts 160 units and has a multicultural/ethnic offer.

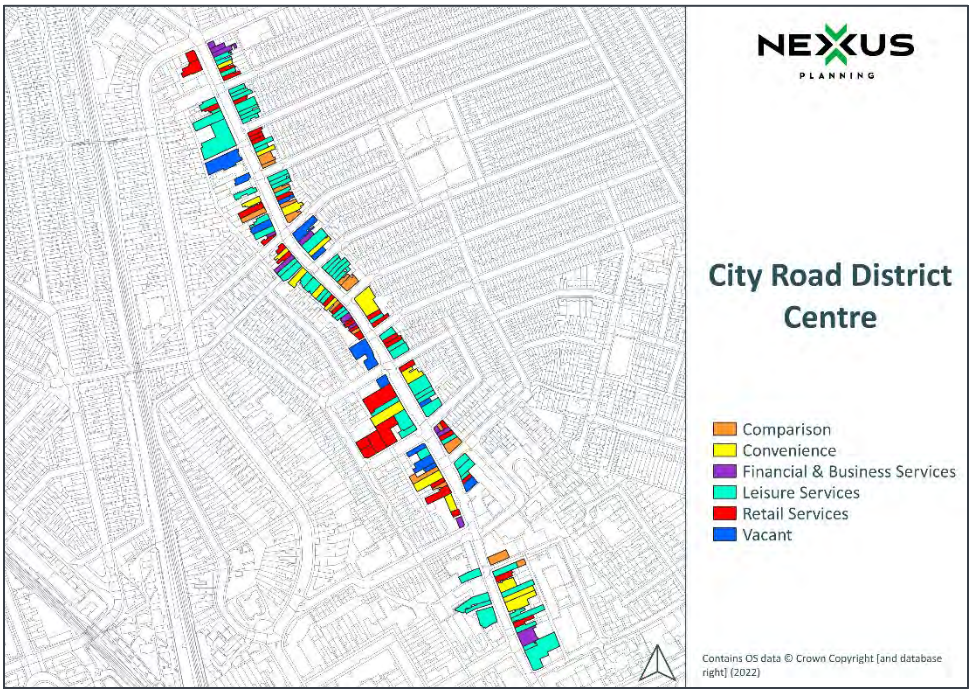
Figure 8.12.1 **Photos of City Road**



Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 8.12.2 **City Road Composition Map**



8.13 The comparison offer consists of 16 units, which makes up 10.0% of the total offer, significantly lower than the UK average (26.9%).

8.14 10.6% (17 units) of total units are convenience, which is slightly higher than the UK average (9.3%). This includes a Tesco store, a Spar, and a number of ethnic food stores.

8.15 Services make up 71.3% (114 units) of the total offer, which is significantly above to the UK average (49.8%).

a. Retail services make up 23.1% (37 units) of the total offer, which is significantly above than the UK average (15.8%).

b. Leisure services make up 40.6% (65 units) of the total number of units, which is significantly higher than the UK average (25.2%). The range of cafes and restaurants is the top "like" about the centre, according to the household survey.

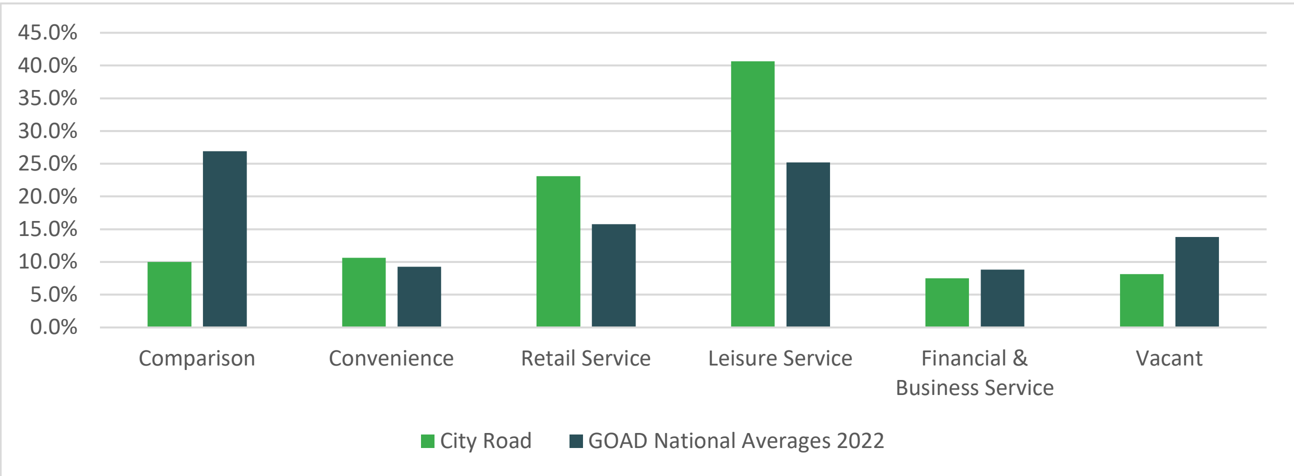
c. Financial & Business Services make up 7.5% (12 units) of units, which is slightly lower than the UK average (8.8%).

8.16 13 units are vacant, 8.1% of the total offer. This is significantly lower than the UK average (13.8%).

Figure 8.16.1 **City Road Composition Table**

Categories	City Road 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	16	10.0%	26.9%
Convenience	17	10.6%	9.3%
Services (Total)	114	71.3%	49.8%
Retail	*37*	*23.1%*	*15.8%*
Leisure	*65*	*40.6%*	*25.2%*
Financial & Business	*12*	*7.5%*	*8.8%*
Vacant	13	8.1%	13.8%
TOTAL	160	100.0%	100.0%

Figure 8.16.2 **City Road Composition Graph**



Environmental Quality

8.17 The overall appearance of the centre could be improved, with some buildings looking tired and in need of upkeep/repair. There are a number of larger derelict buildings that act as blight. Improved cleaning is needed with litter, fly-tipping, graffiti and weeds on pavement present – the household survey shows that dirty streets/poor maintenance was the top dislike about the centre. The centre would also benefit from additional landscaping and greenery.

Perception of Safety

8.18 The centre has a safe feel with no noticeable signs of day-time antisocial behaviour, albeit on-pavement cycling and parking has been spotted on the day of the visit. No noticeable CCTV was present.

Accessibility and Pedestrian Flow

8.19 The centre is flat, linear and is easy to navigate. However, it has narrow and in place uneven pavements which impede pedestrian flow. It is also dominated by traffic (with on street parking), and pedestrian crossings are limited – these impede pedestrian flow. Lack of parking has been identified by the household survey as the second most prevalent issue – illegal on-pavement parking was spotting on the day of the visit. Whilst some cycle parking is present, there are no cycle lanes, and illegal on- pavement cycling has been spotted on the day of visit.

Public Opinion

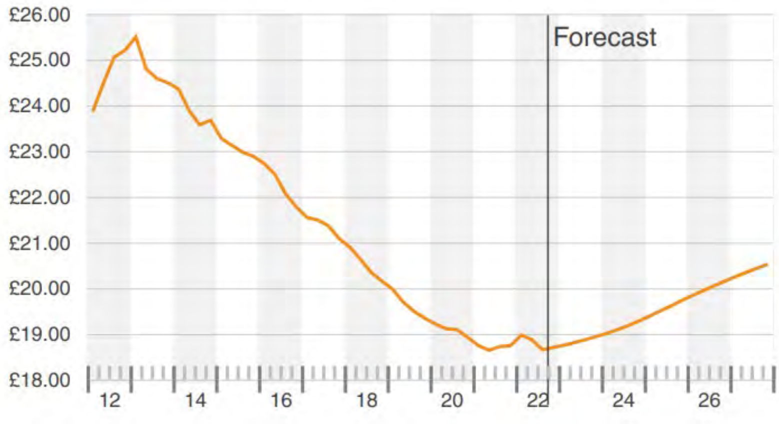
8.20 Results from the household survey identified the top "likes" and "dislikes" of the city centre, as seen below.

Figure 8.20.1 **City Road Public Opinion**

Rents

8.21 The CoStar Retail Report 2022 identifies the market rent per square foot to be £18.66.

Figure 8.21.1 **Market rent per SF for City Road**



Source: CoStar Retail Report 2022

Summary of Key Issues

8.22 City Road District Centre has a strong retail services and leisure offer and has low vacancy rates. Its multicultural/ethnic offer is a clear USP. However its environmental quality is in need of improvement in terms of street cleaning and façade maintenance, as well as more landscaping. Lack of parking, congestion and car dominance is also a concern. The centre would benefit from a public realm and movement strategy.

Clifton Street

Description

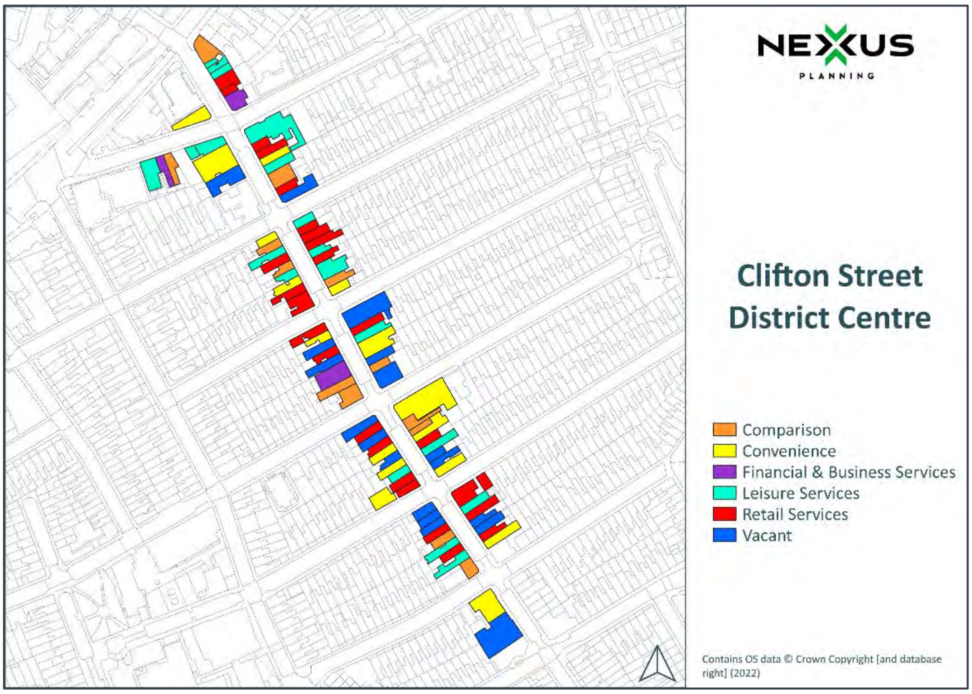
8.23 Clifton Street is a district centre. It is linear in nature and hosts 95 units. The centre is located just to the east of Cardiff city centre, in the Adamsdown suburb.

Figure 8.23.1 **Photos of Clifton Street**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 8.23.2 **Clifton Road Composition Map**



8.24 The comparison offer consists of 13 units, which makes up 13.7% of the total offer, significantly lower than the UK average (26.9%).

8.25 16.8% (16 units) of total units are convenience, which is much higher than the UK average (9.3%). This includes a Tesco and Premier stores, and a number of independent stores including two bakeries and two butchers.

8.26 Services make up 50.5 % (48 units) of the total offer, which is similar to the UK average (49.8%).

a. Retail services make up 27.4% (26 units) of the total offer, which is significantly above than the UK average (15.8%).

b. Leisure services make up 20.0% (19 units) of the total number of units, which is significantly below the UK average (25.2%). The household survey highlights dissatisfaction with the level of leisure provisions.

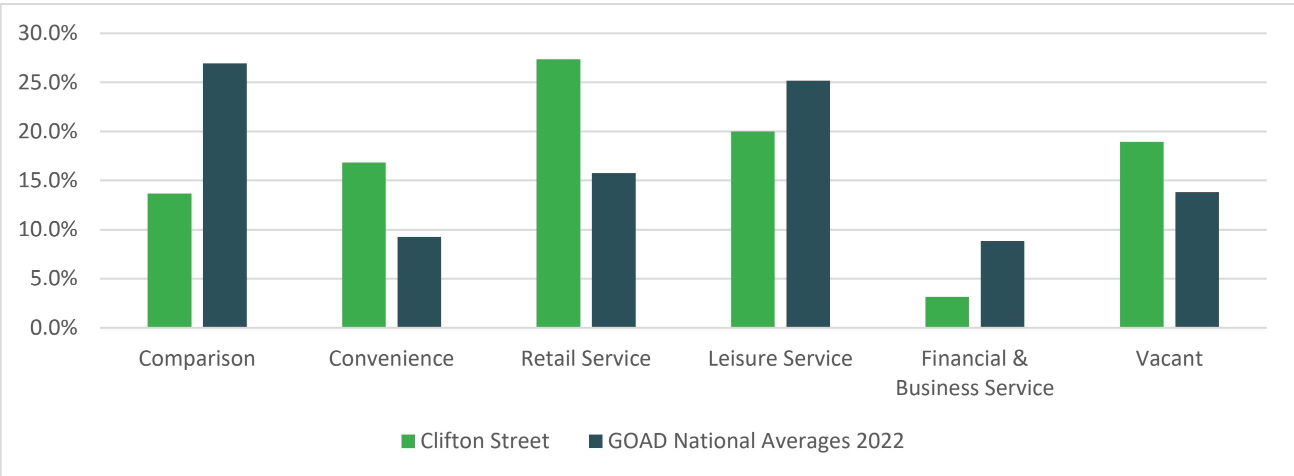
c. Financial & Business Services make up 3.2% (3 units), which is much lower than the UK average (8.8%).

8.27 18 units are vacant, 19.0% of the total offer. This is significantly above the UK average (13.8%).

Figure 8.27.1 **Clifton Street Composition Table**

Categories	Clifton Street 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	13	13.7%	26.9%
Convenience	16	16.8%	9.3%
Services (Total)	48	50.5%	49.8%
Retail	26	27.4%	15.8%
Leisure	19	20.0%	25.2%
Financial & Business	3	3.2%	8.8%
Vacant	18	19.0%	13.8%
TOTAL	95	100.0%	100.0%

Figure 8.27.2 **Clifton Street Composition Graph**



Environmental Quality

8.28 The quality of environment can be improved. Some buildings are looking tired and in need for upkeep/repair. There are a number of derelict buildings and there is high vacancy rate – which together reduce the appearance of the centre. Improved cleaning is needed with litter, graffiti and weeds on pavement present – the household survey shows that dirty streets/poor maintenance was the top dislike about the centre. The centre would also benefit from additional landscaping and greenery.

Perception of Safety

8.29 The centre has a reduced perception of safety. Homelessness and substance abuse is present, with some signs of antisocial behaviour. The household survey identified "poor atmosphere and unfriendly people" as one of the top dislikes about the centre. Illegal on-pavement cycling has been spotted on the day of visit. No noticeable CCTV was present.

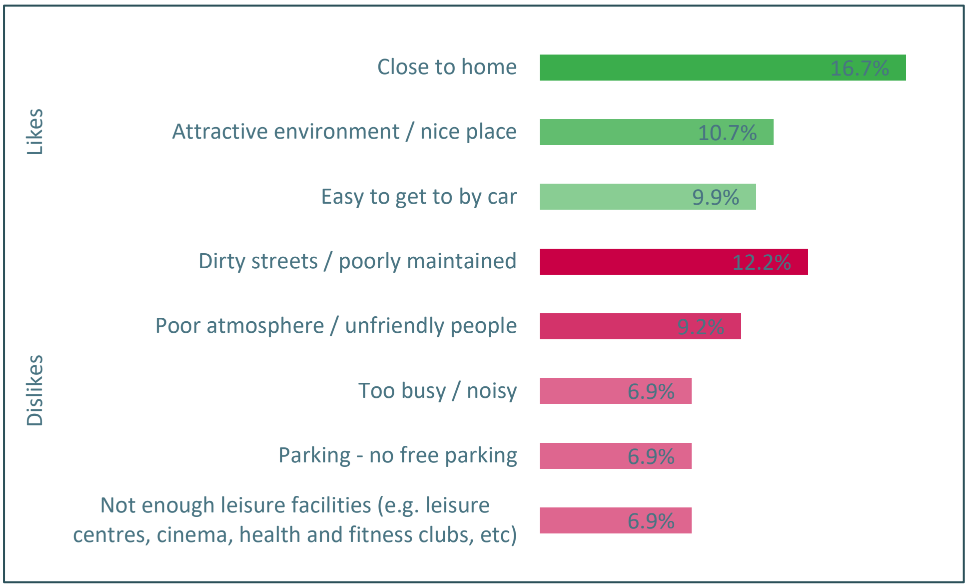
Accessibility and Pedestrian Flow

8.30 The centre is flat, linear and is easy to navigate. There are few impediments to pedestrian flow, albeit on-street parking is present. Lack of free parking has been identified by the household survey as a concern. There are no cycle lanes, and illegal on-pavement cycling has been spotted on the day of visit.

Public Opinion

8.31 Results from the household survey identified the top "likes" and "dislikes" of Clifton Street, as seen below.

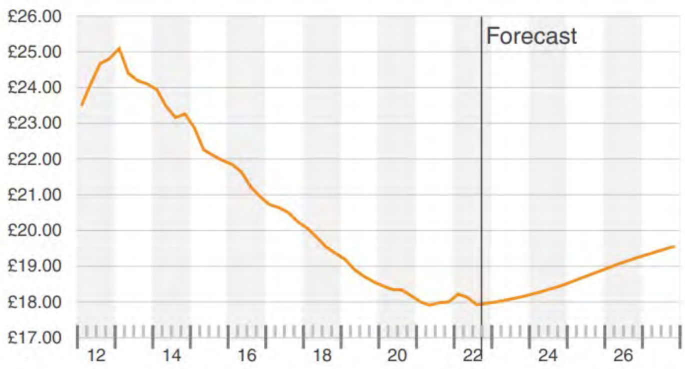
Figure 8.31.1 **Clifton Street Public Opinion**



Rents

8.32 The CoStar Retail Report 2022 identifies the market rent per square foot to be £17.91.

Figure 8.32.1 **Market rent per SF for Clifton Street**



Source: CoStar Retail Report 2022

Summary of Key Issues

8.33 Clifton Street District Centre appears to be struggling. Whilst it has a good convenience and retail services offer, all other GOAD categories are lacking. Vacancy rates are also significantly above the UK average. Environmental quality is in need of improvement in terms of street cleaning and façade maintenance, as well as more landscaping. The centre also has reduced perception of safety. The centre would benefit from a public realm and safety strategy.

Cowbridge Road East

Description

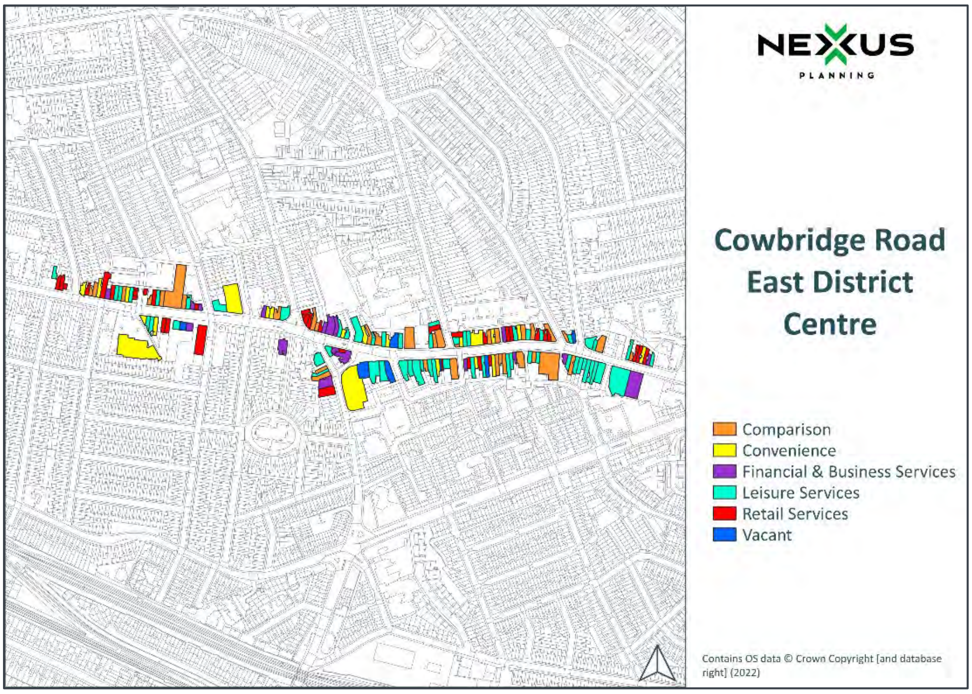
8.34 Cowbridge Road East is a linear centre running from east to west in the Canton area of Cardiff, around 1km west of Cardiff city centre.

Figure 8.34.1 **Photos of Cowbridge Road East**

Source: Google Maps (2021 & 2022)

GOAD Composition and Vacancies

Figure 8.34.2 **Cowbridge Road East Composition Map**



8.35 The comparison offer consists of 35 units, which makes up 19.9% of the total offer, which is significantly lower than the UK average. These are primarily independent retailers, though a few national retailers are present, such as Home Bargains, Peacocks and Card Factory. The comparison offer is aimed towards lower budgets and is not particularly diverse.

8.36 11.9% (21 units) of total units are convenience, which is higher than the UK average. This includes both small convenience stores, butchers and delis, and larger national supermarkets.

8.37 Services make up 63.6% (112 units) of the total offer, which is significantly higher than the UK average.

a. Retail services make up 21.0% (37 units) of the total offer, which is significantly higher than the UK average of 25.0%. These units are primarily hairdressers, barbers and beauty salons.

b. Leisure services make up 32.4% (57 units) of the total number of units, which is significantly higher than the UK average. The leisure offer consists of independent restaurants, cafes and takeaways.

c. Financial & Business Services make up 10.2% (18 units), which is higher than that of the UK average.

8.38 Only eight units (4.6% of the total offer) are vacant. This is significantly below the UK average.

Figure 8.38.1 **Cowbridge Road East Composition Table**

Categories	Cowbridge Road East 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	35	19.9%	26.9%
Convenience	21	11.9%	9.3%
Services (Total)	112	63.6%	49.8%
Retail	*37*	*21.0%*	*15.8%*
Leisure	*57*	*32.4%*	*25.2%*
Financial & Business	*18*	*10.2%*	*8.8%*
Vacant	8	4.6%	13.8%
TOTAL	176	100.0%	100.0%

Figure 8.38.2 **Cowbridge Road East Composition Graph**

Environmental Quality

8.39 Shop appearances are somewhat mixed, with some outdated frontages and others with attractive, modern frontages.

8.40 Due to the narrow pavements, there is relatively little street furniture or greenery. Environmental quality noticeably improves to the west of the centre, where the street is wider and where there are some planters.

Perception of Safety

8.41 Pedestrian flow is relatively high, resulting in an environment that feels busy and safe.

Accessibility and Pedestrian Flow

8.42 Pedestrian accessibility is most positive in the west of the centre, where wide pavements and traffic calming measures allow for the safe and easy movement of pedestrians. Accessibility is more of an issue moving east however, as pavements become narrower and traffic level increases. There are also few crossing opportunities for pedestrians, hindering their movement.

8.43 The majority of survey respondents (60.5%) travel to the centre by car. Traffic levels are high and there is some congestion at the junction of Cowbridge Road East and Llandaff Road. Some free on-street parking is available.

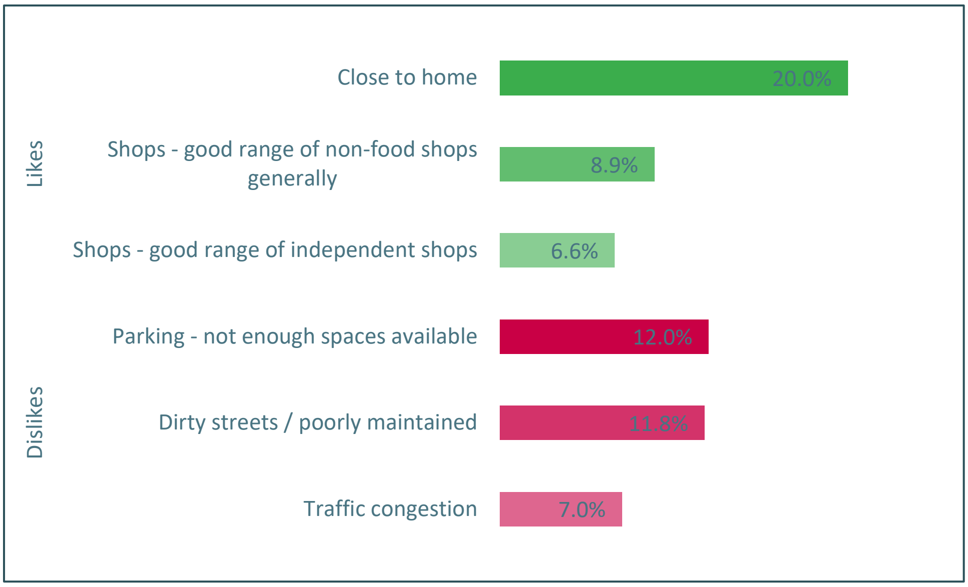
8.44 There are several bus stops placed along Cowbridge Road East, offering frequent services to Cardiff city centre. 17.6% of survey respondents travel to the centre by bus, which is a higher proportion than any other district centres.

8.45 Cycle lanes are present in the east of the centre. Cycle racks and an OVO bike station are also located in the paved area outside Tesco Express.

Public Opinion

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

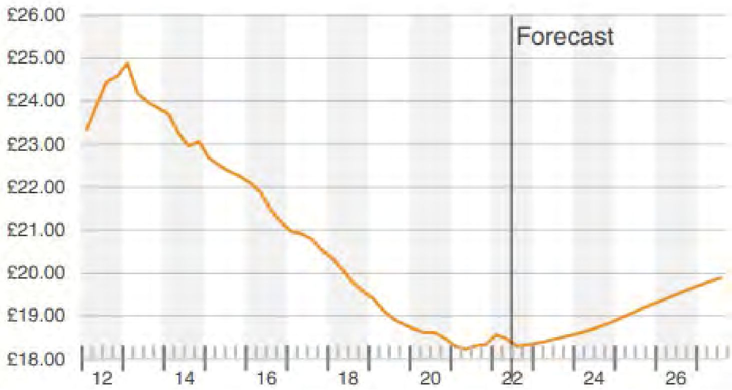
Figure 8.46.1 **Cowbridge Road East Public Opinion**



Rents

8.47 The CoStar Retail Report 2022 identifies the market rent per square foot to be £18.30.

Figure 8.47.1 **Market rent per SF for Cowbridge Road East**



Source: CoStar Retail Report 2022

Summary of Key Issues

8.48 The comparison offer is smaller than average and not particularly diverse; more could be done to diversify the offer to different groups.

8.49 Environmental quality and pedestrian accessibility is an issue in the east of the centre, whereas in the west of the centre, traffic calming measures have been introduced and improvements to the environment have been made. Expanding these measures further east along the centre could improve the overall environmental quality and safety for pedestrians.

Crwys Road/Woodville Road

8.50 Crwys Road/Woodville Road is a designated district centre. It is linear in nature arranged in an L-shape, hosting 128 units.

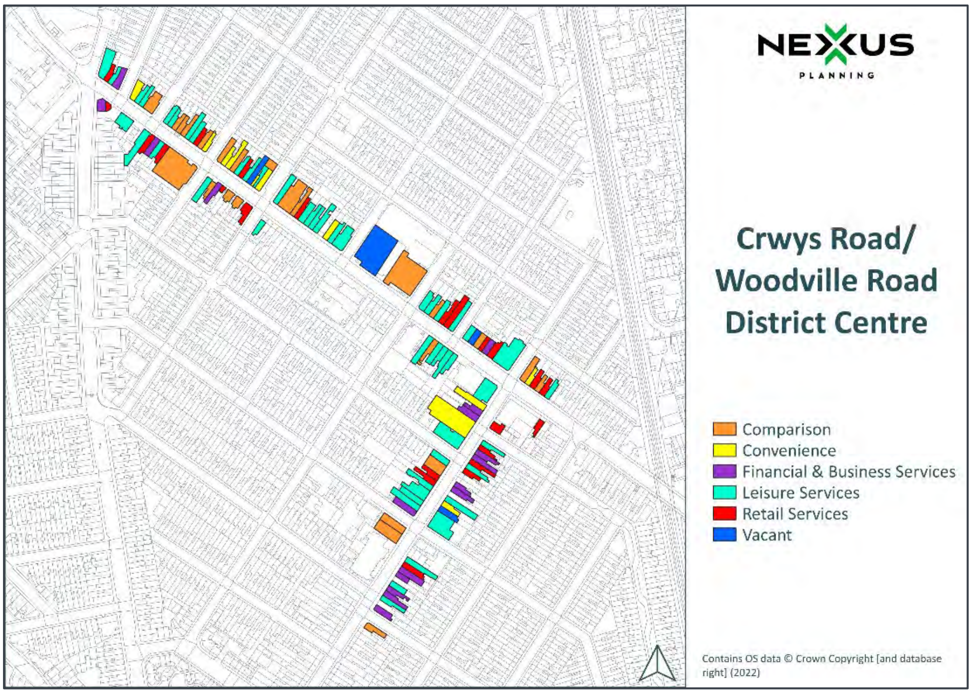
Description

Figure 8.50.1 **Photos of Crwys Road/Woodville Road**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 8.50.2 **Crwys Road/Woodville Road Composition Map**



8.51 The comparison offer consists of 24 units, which makes up 18.8% of the total offer, which is significantly lower than the UK average (26.9%). The offer is relatively diverse, including clothes shops, chemists, charity shops, electrics and homeware retailers.

8.52 8.6% (11 units) of total units are convenience, which is slightly lower than the UK average (9.3%). This includes a Sainsbury's and a number of independent retailers, including a baker and butchers as well as ethnic food stores.

8.53 Services make up 69.5% (89 units) of the total offer, which is significantly above to the UK average (49.8%).

a. Retail services make up 18.0% (23 units) of the total offer, which is higher than the UK average (15.8%).

b. Leisure services comprise 38.3% (49 units) of the total number of units, which is significantly higher than the UK average (25.2%). Whilst the offer appears to be diverse, the household survey indicated concern over an excessive number of takeaways.

c. Financial & Business Services make up 13.3% (17 units), which is higher than the UK average (8.8%).

8.54 Just 4 units are vacant, which is 3.1% of the total offer. This is significantly lower than the UK average (13.8%).

Figure 8.54.1 **Crwys Road/Woodville Road Composition Table**

Categories	Crwys Road/Woodville Road 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	24	18.8%	26.9%
Convenience	11	8.6%	9.3%
Services (Total)	89	69.5%	49.8%
Retail	*23*	*18.0%*	*15.8%*
Leisure	*49*	*38.3%*	*25.2%*
Financial & Business	*17*	*13.3%*	*8.8%*
Vacant	4	3.1%	13.8%
TOTAL	128	100.0%	100.0%

Figure 8.54.2 **Crwys Road/Woodville Road Composition Graph**

Environmental Quality

8.55 The quality of environment is average. The centre overall appearance could be improved, with some buildings looking tired and in need for upkeep/repair. Improved cleaning is needed with litter, graffiti and weeds on pavement present. The road has recently been repaved which has had a positive impact on the overall appearance. The centre is also dominated by parked cars, which take away from the overall appearance. The centre would also benefit from additional landscaping and greenery.

Perception of Safety

8.56 The centre has a safe feel with no noticeable signs of day-time antisocial behaviour, albeit on-pavement cycling and parking has been spotted on the day of the visit. No noticeable CCTV was present.

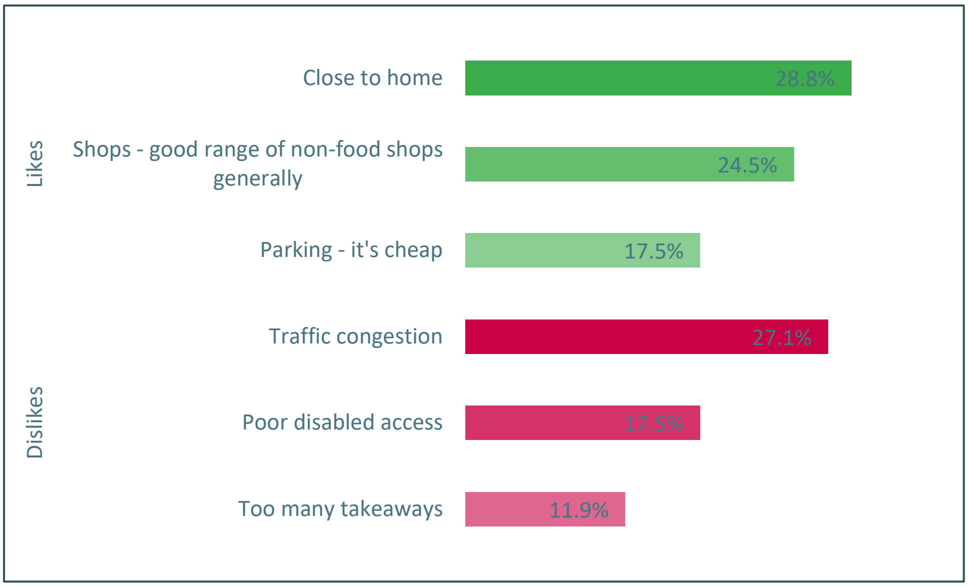
Accessibility and Pedestrian Flow

8.57 The centre is flat, compact and linear and hence it is easy to navigate through. It benefits from multiple pedestrian crossings and has relatively wide pavement, which aid all pedestrian flow. However, poor disabled access has also been identified by the household survey as a concern. Furthermore, the centre is also dominated by traffic, and on-street parking which further impede pedestrian flow – traffic congestion has been identified by the household survey as a concern. Whilst some cycle parking is present, there are no cycle lanes, and illegal on-pavement cycling has been spotted on the day of visit.

Public Opinion

8.58 Results from the household survey identified the top “likes” and “dislikes” of Crwys Road/Woodville Road, as seen below.

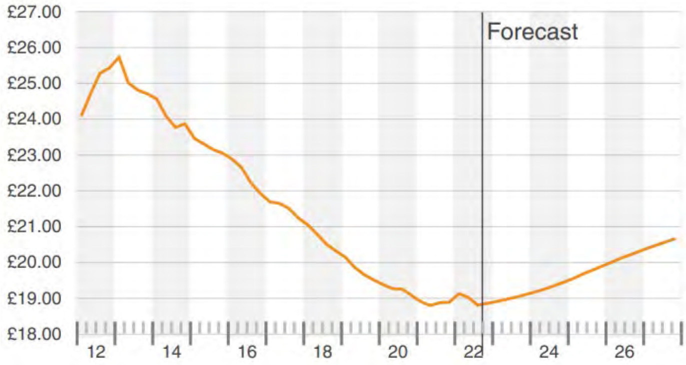
Figure 8.58.1 **Crwys Road/Woodville Road Public Opinion**



Rents

8.59 The CoStar Retail Report 2022 identifies the market rent per square foot to be £18.30.

Figure 8.59.1 **Market rent per SF for Crwys Road/Woodville Road**



Source: CoStar Retail Report 2022

Summary of Key Issues

8.60 Crwys Road/Woodville Road District Centre has a good convenience and service offer, and the vacancy levels are very low. However, it environmental quality could be improved in terms of street cleaning and façade maintenance, as well as more landscaping.

Bute Street/James Street

Description

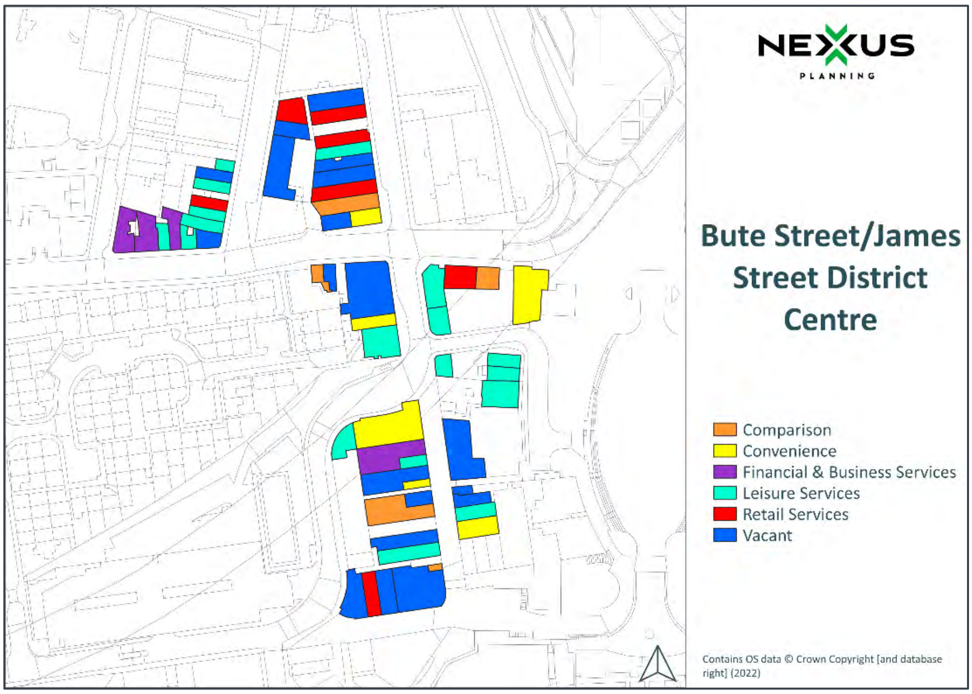
8.61 Bute Street and James Street district centre can broadly be separated into two distinct areas. To the south of the centre is Mermaid Quay, a modern shopping and leisure district, and to the north there are units along James Street, Bute Street and West Bute Street.

Figure 8.61.1 **Photos of Bute Street/James Street**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 8.61.2 **Bute Street/James Street Composition Map**



8.62 The comparison offer consists of 5 units, which makes up 8.5% of the total offer, which is significantly lower than the UK average. This offer consists of a vape shop, a jewellers, a shoe shop, a pharmacy and a boutique.

8.63 10.2% (6 units) of total units are convenience, which is higher than the UK average. This includes three bakeries and three supermarkets/convenience stores.

8.64 Services make up 49.2% (29 units) of the total offer, which is similar to the UK average.

a. Retail services make up 11.9% (7 units) of the total offer, which is significantly lower than the UK average of 15.8%.

b. Leisure services make up 30.5% (18 units) of the total number of units, which is significantly higher than the UK average. The leisure offer consists of cafes, bars and restaurants.

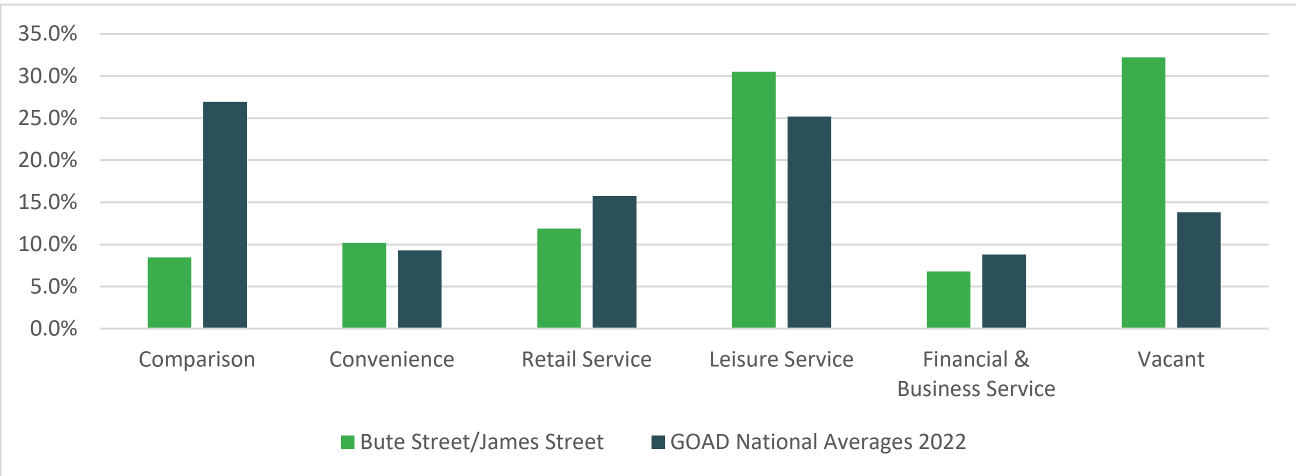
c. Financial & Business Services make up 6.8% (4 units), which is significantly lower than that of the UK average.

8.65 19 units are vacant, 32.2% of the total offer. This is significantly higher than the UK average, and the highest proportion amongst all centre surveyed in the Cardiff.

Figure 8.65.1 **Bute Street and James Street Composition Table**

Categories	Bute Street/James Street 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	5	8.5%	26.9%
Convenience	6	10.2%	9.3%
Services (Total)	29	49.2%	49.8%
Retail	*7*	*11.9%*	*15.8%*
Leisure	*18*	*30.5%*	*25.2%*
Financial & Business	*4*	*6.8%*	*8.8%*
Vacant	19	32.2%	13.8%
TOTAL	59	100.0%	100.0%

Figure 8.65.2 **Bute Street and James Street Composition Graph**



Environmental Quality

8.66 Environmental quality in the Mermaid Quay area is very high; the centre is modern, clean and well maintained. Along the walkways, seating, bins and planters have been provided. Its location on the waterfront gives it a pleasant and open atmosphere.

8.67 On James Street and Bute Street to the north, environmental quality is slightly lower. Whilst the traditional architecture here has potential, some rundown and vacant units detract somewhat from the overall appearance of the centre.

Perception of Safety

8.68 The centre feels very open and safe, with a relatively high amount of pedestrians.

Accessibility and Pedestrian Flow

8.69 Accessibility for pedestrians is generally very good. Pavements are wide, allowing for easier movement, and Mermaid Quay is pedestrianised. Pedestrian flow is quite high, particularly along the waterfront.

8.70 Access to the centre by private vehicle is also easy, and there is a paid car park to the west of Mermaid Quay, and on-street parking along Bute Street and West Bute Street. A relatively low proportion of survey respondents (53.0%) travel to the centre by car.

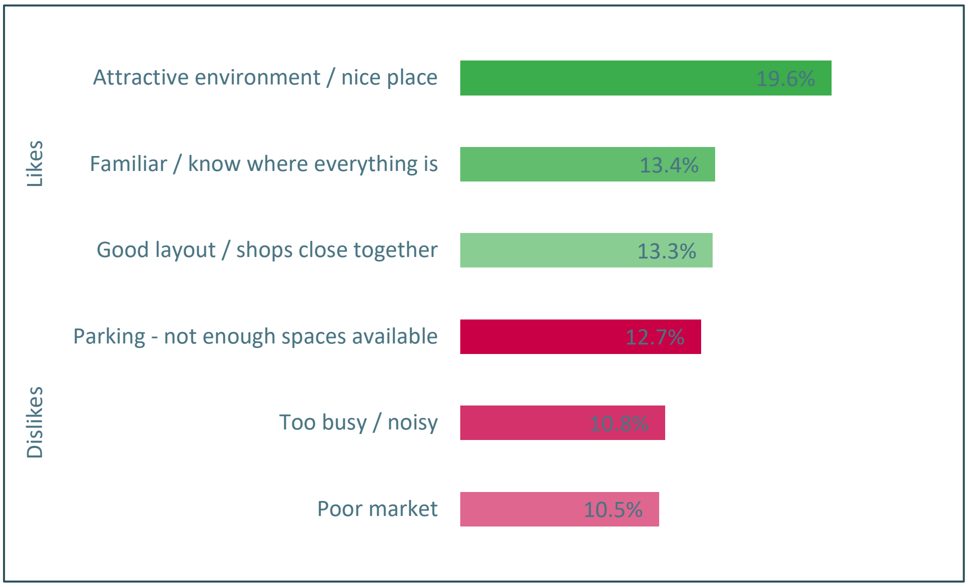
8.71 To the north of Mermaid Quay is a taxi rank and a bus stop. The bus stop offers regular services to the city centre.

8.72 There are cycle lanes along James Street, and an OVO cycle station is located to the north-west of Mermaid Quay. 6.6% of survey respondents travel to the centre by bike, the highest proportion across all district centres.

Public Opinion

8.73 Results from the household survey identified the top "likes" and "dislikes" of Bute Street/James Street, as seen below.

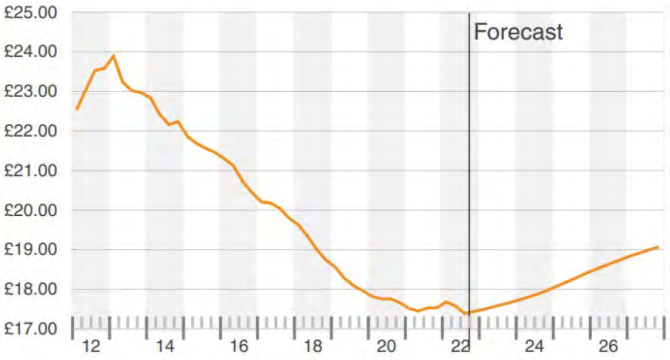
Figure 8.73.1 **Bute Street/James Street Public Opinion**



Rents

8.74 The CoStar Retail Report 2022 identifies the market rent per square foot to be £17.39.

Figure 8.74.1 **Market rent per SF for Bute Street/James Street**



Source: CoStar Retail Report 2022

Summary of Key Issues

8.75 Whilst the leisure offer is impressive, there are relatively few comparison units. There are also a high number of vacancies. Introducing new comparison tenants to these vacant units may attract more visitors to the centre.

8.76 Environmental quality is high in Mermaid Quay, but noticeably decreases to the north of the centre, along James Street and Bute Street. More effort could be made to conceal vacant properties and to improve the appearance of some operating units here.

Merthyr Road, Whitchurch

Description

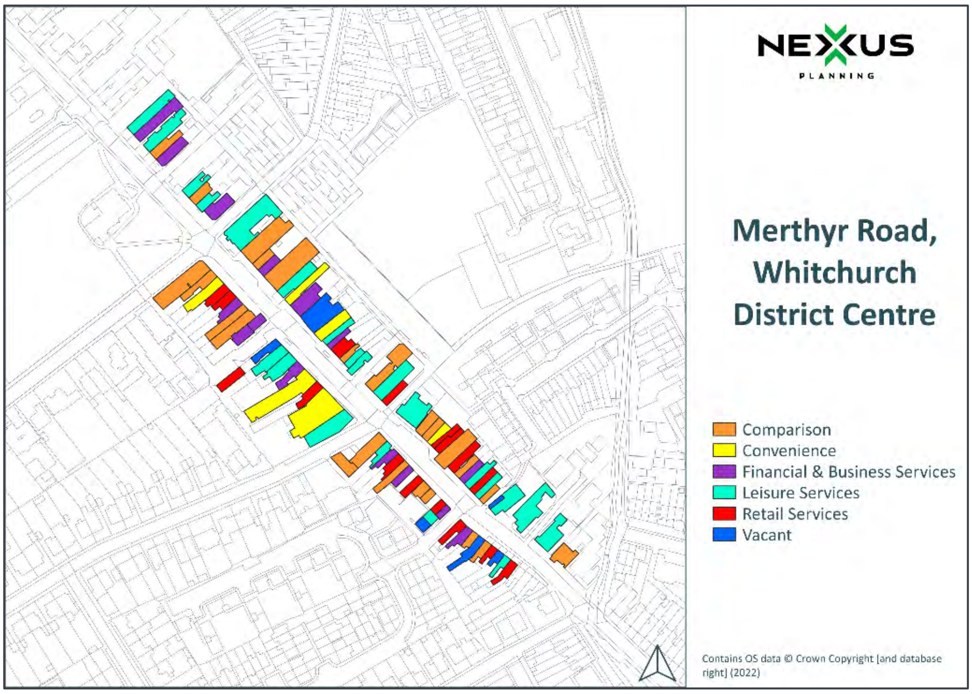
8.77 Merthyr Road, Whitchurch is a linear District Centre approximately 5 kilometres north of Cardiff City Centre. St Mary's Parish Church is prominent to the west of the centre, whilst a large pay and display car park off Old Church Road marks its easterly boundary.

Figure 8.77.1 **Photos of Merthyr Road, Whitchurch**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 8.77.2 **Merthyr Road, Whitchurch Composition Map**



8.78 The centre has 24 comparison goods units (27.0% of units), which is exactly in line with UK average. There are 6 convenience goods units (6.7%), which is slightly below average.

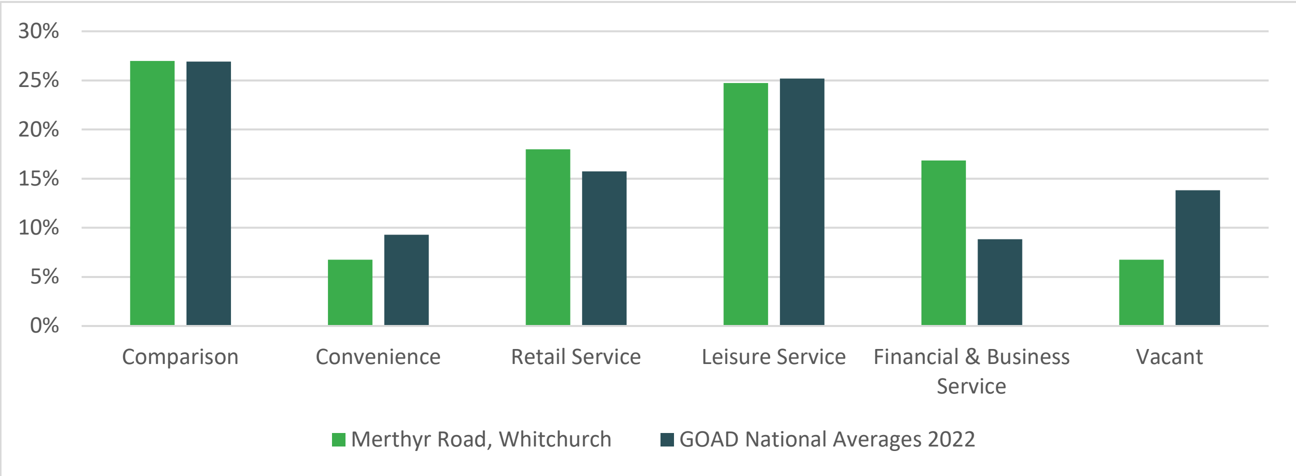
8.79 The centre is accented towards service provision, with almost 60% of units being in that sector. There is an especially strong provision of leisure and financial and business services, with both categories significantly exceeding the UK average.

8.80 The centre has a low vacancy rate, at just 6.7%. This is less than half the UK average.

Figure 8.80.1 **Merthyr Road, Whitchurch Composition Table**

Categories	Merthyr Road, Whitchurch 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	24	27.0%	26.9%
Convenience	6	6.7%	9.3%
Services (Total)	53	59.6%	49.8%
Retail	*16*	*18.0%*	*15.8%*
Leisure	*22*	*24.7%*	*25.2%*
Financial & Business	*15*	*16.9%*	*8.8%*
Vacant	6	6.7%	13.8%
TOTAL	89	100.0%	100.0%

Figure 8.80.2 **Merthyr Road, Whitchurch Composition Graph**



Environmental Quality

8.81 The centre has little greenery, and Merthyr Road is a busy road, carrying not just local traffic but also through-traffic.

8.82 However, some relief is provided with access to the churchyard at St Mary's. The centre also has a number of well-kept and attractive shop units which adds to its appeal. There are a small number of cafes and pubs with outside seating spaces, which also adds to the centre's appeal. We found very little evidence of litter or graffiti.

Perception of Safety

8.83 The centre has a low vacancy rate and a bustling feel, so there is plenty of natural surveillance. The linear nature of the centre also adds to a feeling of safety as there are no notable alleyways or quiet parts of the centre.

Accessibility and Pedestrian Flow

8.84 The centre benefits from a large and relatively easily accessible pay and display car park just a few metres off Merthyr Road. Parking is free for two hours and is very well used. The household survey evidence suggests that the availability of parking becomes problematic at peak times.

8.85 Whilst Merthyr Road itself is busy, there are five dedicated crossing points throughout the centre, which provide safe refuge for pedestrians.

8.86 Pavements are well kept and for the most part, wide, meaning there is little prospect of pedestrian/traffic conflict. This is especially true on the eastern side of the street where recent works have been undertaken to widen parts of the pavement.

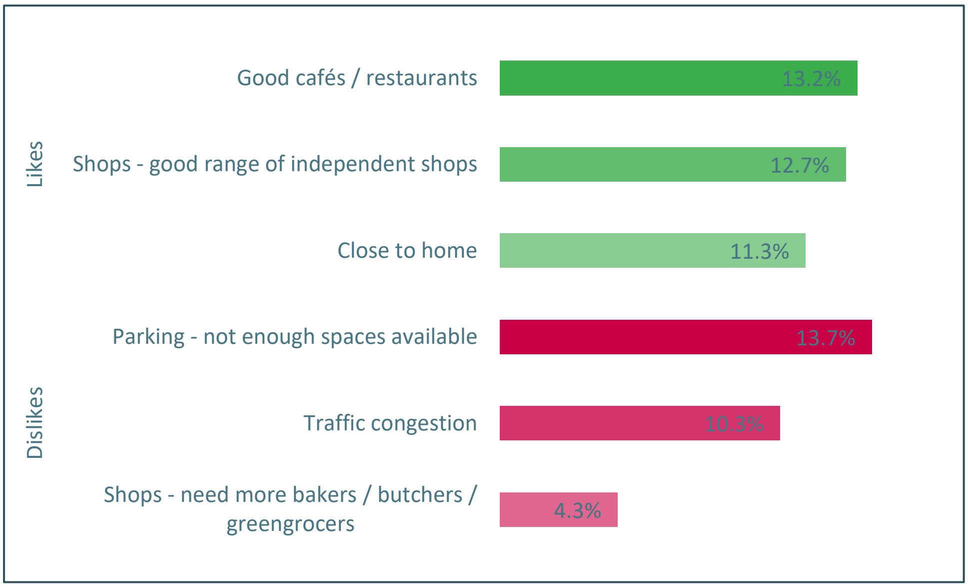
8.87 An OVO electric bike stand is located on the junction of Bishop's Road and Merthyr Road.

8.88 There are three bus services which connect the District Centre with the City Centre to the south, and places such as Llandaff to the west. Bus stops are located on either side of Merthyr Road, between the junctions of Bishop's Road and Old Church Road. A relatively high proportion of survey respondents (15.3%) travel to the centre by bus.

Public Opinion

8.89 Results from the household survey identified the top "likes" and "dislikes" of Merthyr Road, Whitchurch as seen below.

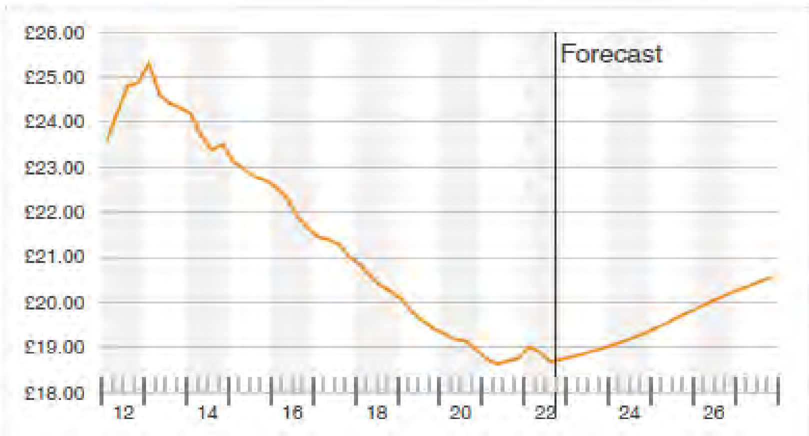
Figure 8.89.1 **Merthyr Road, Whitchurch Public Opinion**



Rents

8.90 The CoStar Retail Report 2022 identifies the market rent per square foot to be £18.68.

Figure 8.90.1 **Market rent per SF for Merthyr Road, Whitchurch**



Source: CoStar Retail Report 2022

Summary of Key Issues

8.91 Merthyr Road, Whitchurch is a popular and well-appointed centre, with reasonably high environmental quality and low vacancy rates. Both its shops and leisure services seem popular with local residents. Notwithstanding, the centre is reasonably car-orientated and there are evidentially some issues around traffic congestion and a lack of parking availability at peak periods.

Penarth Road/Clare Road

Description

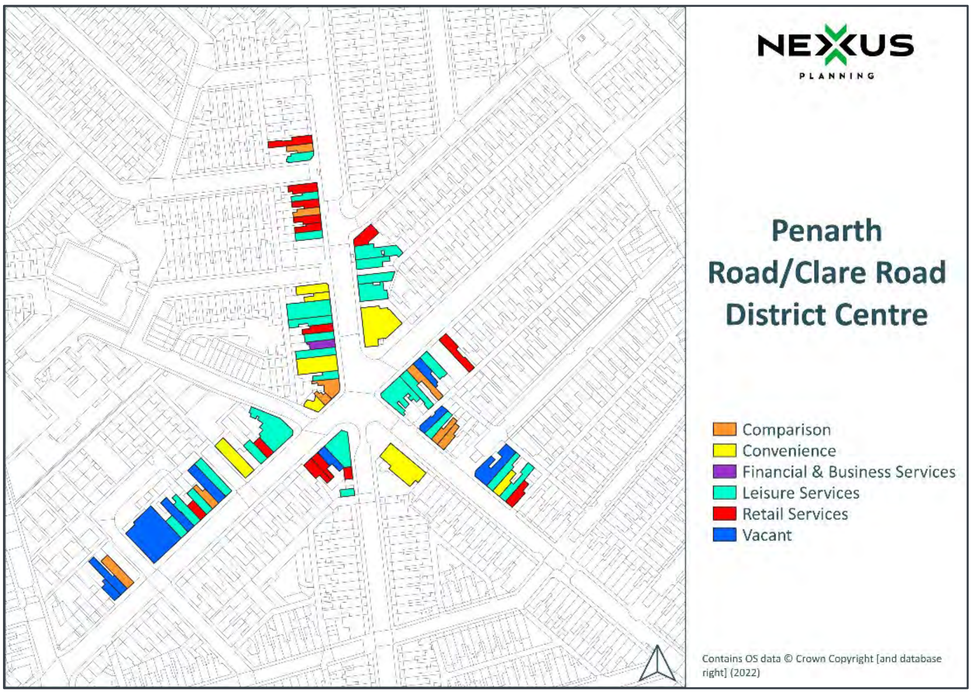
8.92 Penarth Road and Clare Road is a district centre in the Grangetown area in the south-east of Cardiff. Its focal point is the intersection between Penarth Road, Clare Road and Corporation Road.

Figure 8.92.1 **Photos of Penarth Road/Clare Road**

Source: Google Maps, 2021

GOAD Composition and Vacancies

Figure 8.92.2 **Penarth Road/Clare Road Composition Map**



8.93 The comparison offer consists of 9 units, which makes up 13.4% of the total offer, which is significantly lower than the UK average. With the exception of Well Pharmacy, these are all independent retailers.

8.94 11.9% (8 units) of total units are convenience, which is higher than the UK average. This includes a Tesco Express, but also some independent bakeries, butchers and greengrocers.

8.95 Services make up 61.2% (41 units) of the total offer, which is significantly higher than the UK average.

a. Retail services make up 20.9% (14 units) of the total offer, which is higher than the UK average of 15.8%. These are predominantly hairdressers and barbers.

b. Leisure services make up 38.8% (26 units) of the total number of units, which is significantly higher than the UK average. Most of these units are takeaways, though there are also some cafes and restaurants.

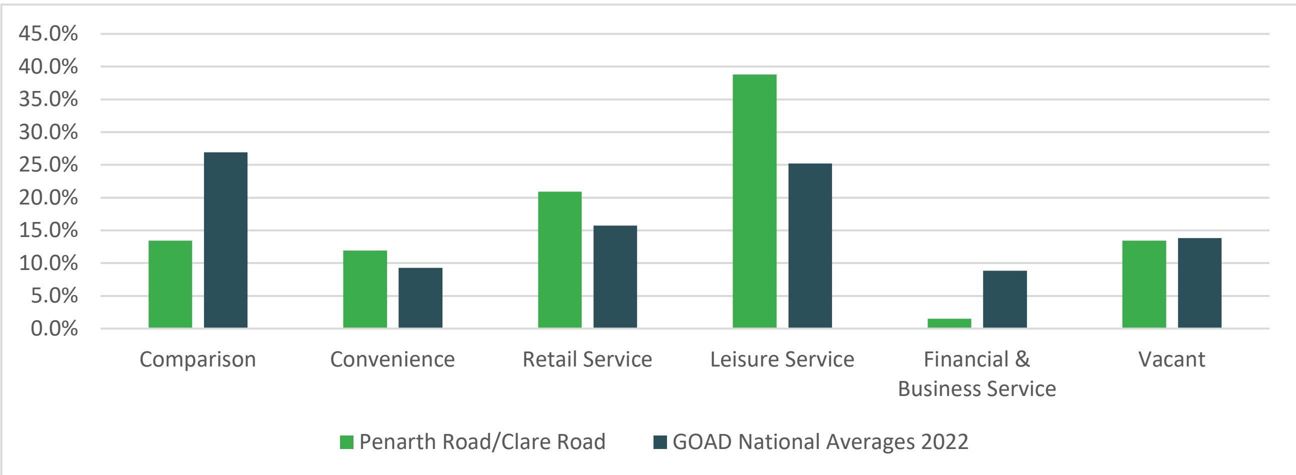
c. There is only one financial and business services unit in the centre, accounting for 1.5% of all units. This is significantly below the UK average of 8.8%.

8.96 9 units are vacant, which is 13.4% of the total offer. This is similar to the UK average. There is a particular cluster of these units to the south-west of the centre along Penarth Road.

Figure 8.96.1 **Penarth Road and Clare Road Composition Table**

Categories	Penarth Road/Clare Road 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	9	13.4%	26.9%
Convenience	8	11.9%	9.3%
Services (Total)	41	61.2%	49.8%
Retail	14	20.9%	15.8%
Leisure	26	38.8%	25.2%
Financial & Business	1	1.5%	8.8%
Vacant	9	13.4%	13.8%
TOTAL	67	100.0%	100.0%

Figure 8.96.2 **Penarth Road and Clare Road Composition Graph**



Environmental Quality

8.97 The quality of the environment in the centre is underwhelming. There is a lack of street furniture throughout the centre, perhaps due to the narrow pavements. There is a small paved area outside of Tesco Express with some benches, but this is a fairly grey and uninspiring area.

8.98 The centre is also not particularly clean, with some litter and graffiti. There are few bins provided throughout.

Perception of Safety

8.99 The centre feels relatively safe, although there are few pedestrians.

Accessibility and Pedestrian Flow

8.100 Pedestrian movement around the centre is somewhat hindered. Due to high traffic levels, it is difficult to cross the road without the use of pedestrian crossings. Pavements are also fairly narrow.

8.101 Traffic levels are relatively high, though there are some traffic calming measures on Corporation Road and Paget Street. There are no car parks in the centre, and on-street parking is limited to side streets, and often for permit holders only. A high proportion (76.4%) of survey respondents travel to the centre by car.

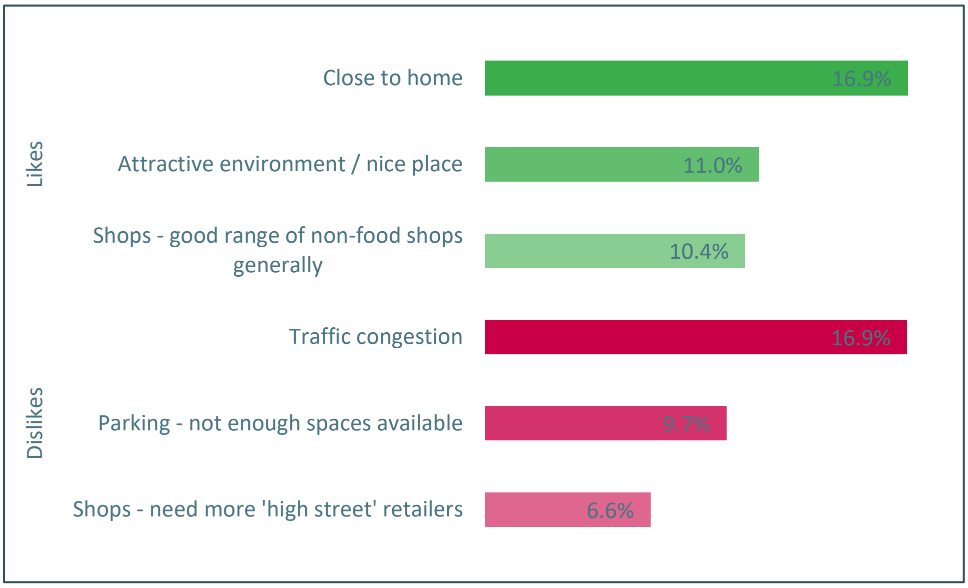
8.102 There are several bus stops in the centre serving many routes, which provide regular services into the city centre.

8.103 There are no cycle lanes in the centre, though there are some cycle racks and an OVO cycle station outside Tesco Express.

Public Opinion

8.104 Results from the household survey identified the top "likes" and "dislikes" of Penarth Road/Clare Road, as seen below.

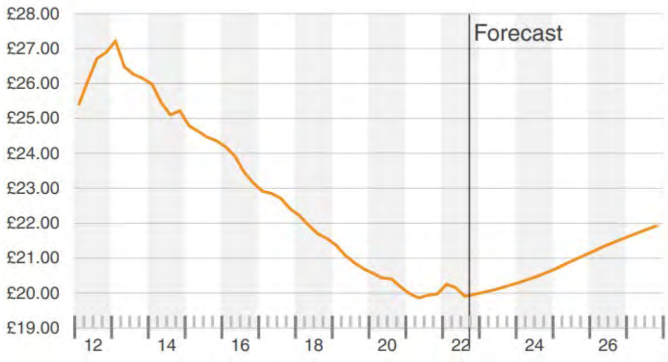
Figure 8.104.1 **Penarth Road/Clare Road Public Opinion**



Rents

8.105 The CoStar Retail Report 2022 identifies the market rent per square foot to be £19.90.

Figure 8.105.1 **Market rent per SF for Penarth Road/Clare Road**



Source: CoStar Retail Report 2022

Summary of Key Issues

8.106 Accessibility is an issue in the centre; high traffic levels create an unpleasant atmosphere for pedestrians which is difficult to navigate at times, and visitors arriving by car may also struggle due to a lack of parking. An expansion of existing traffic calming measures, and a parking management system may alleviate these issues.

8.107 Improvements could also be made to the environmental quality of the centre.

St Mellons

Description

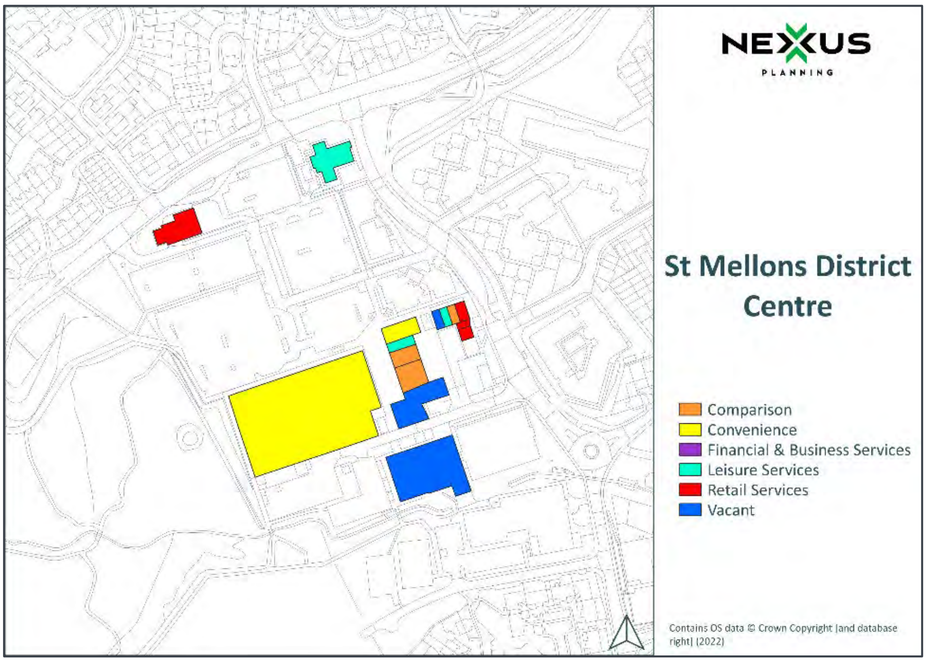
8.108 St Mellons is a suburb and District Centre in south-eastern Cardiff. The District Centre is a purpose-built facility dominated by a large Tesco foodstore and its associated surface car park. A small precinct of shops adjoins the Tesco store.

Figure 8.108.1 **Photos of St Mellons**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 8.108.2 **St Mellons Composition Map**



8.109 There are 15 units forming part of the District Centre, as shown above.

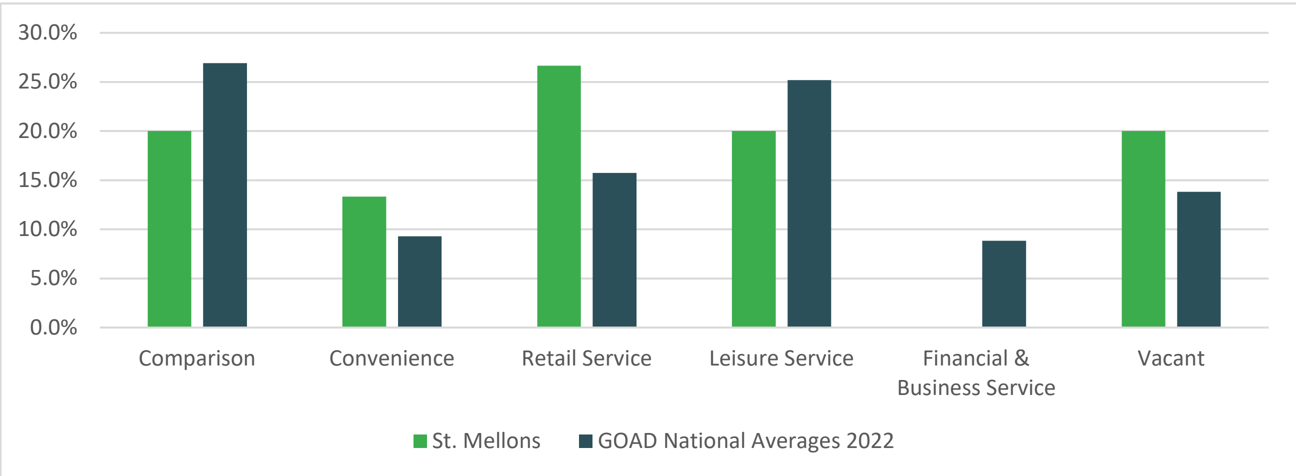
8.110 The large Tesco store underpins the District Centre, with a small number of shops and services providing local residents with complementary offer. Provisions are broadly in line with UK averages, though it is notable that there is no financial or business service offer as part of the centre.

8.111 There are 3 vacant units, comprising 20.0% of all units.

Figure 8.111.1 **St Mellons Composition Table**

Categories	St Mellons 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	3	20.0%	26.9%
Convenience	2	13.3%	9.3%
Services (Total)	7	46.7%	49.8%
Retail	4	26.7%	15.8%
Leisure	3	20.0%	25.2%
Financial & Business	0	0.0%	8.8%
Vacant	3	20.0%	13.8%
TOTAL	15	100.0%	100.0%

Figure 8.111.2 **St Mellons Composition Graph**



Environmental Quality

8.112 General environmental quality is poor. Whilst there are green spaces surrounding the centre, notably to the west, there is little relief from the sea of car parking and concrete pavement in the centre itself. There is very little planting and the opportunity is missed to add some form of relief in the pedestrianised area outside the small units adjacent to the Tesco. The centre has a sterile feel.

8.113 We saw no evidence of litter or graffiti.

Perception of Safety

8.114 The layout of the centre feels relatively safe, though this feeling diminishes in the evening when there is lower footfall and the roller-shutters have been pulled down on a number of units.

Accessibility and Pedestrian Flow

8.115 The surface-level car park provides over 350 spaces and is accessible from Crickhowell Road. It is easy to navigate.

8.116 There is a small cycle store outside the Tesco store.

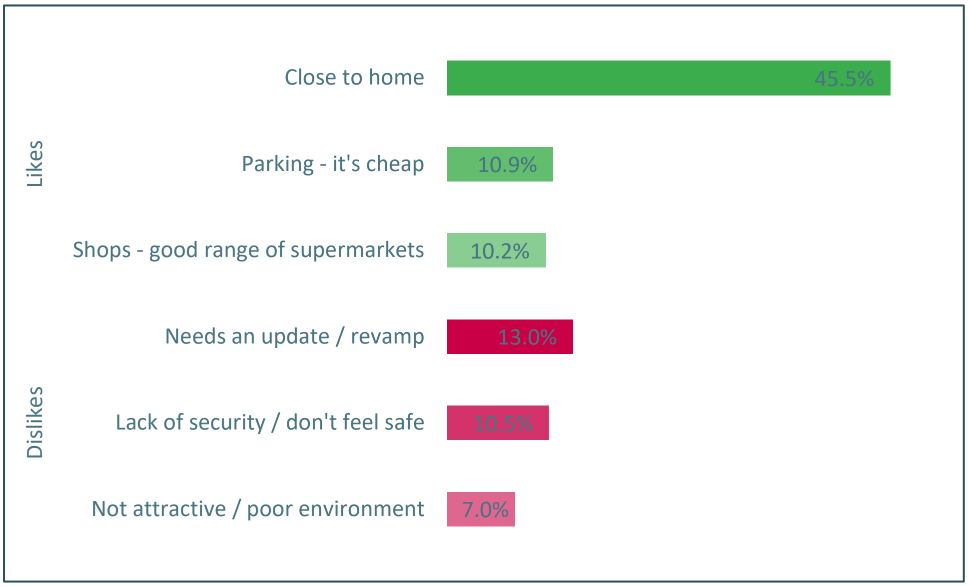
8.117 Two bus routes pass the centre on Willowbrook Drive, connecting the centre with the City Centre via Rumney.

8.118 A very high proportion of survey respondents travel to the centre by car (93.9%), the highest across all district centres. Conversely, only 6.1% of respondents travel on foot.

Public Opinion

8.119 Results from the household survey identified the top "likes" and "dislikes" of St Mellons, as seen below.

Figure 8.119.1 **St Mellons Public Opinion**



Rents

8.120 The CoStar Retail Report 2022 identifies the market rent per square foot to be £16.57.

Figure 8.120.1 **Market rent per SF for St Mellons**

Source: CoStar Retail Report 2022

Summary of Key Issues

8.121 St Mellons District Centre is a busy centre, providing for the needs of predominantly car-borne residents in its surrounds. However, the centre overly relies on the general attraction of the Tesco store, and little effort is made to provide for a pleasant place in which to stay and socialise. The centre is in need of refurbishment and its public realm should be re-thought.

Thornhill

Description

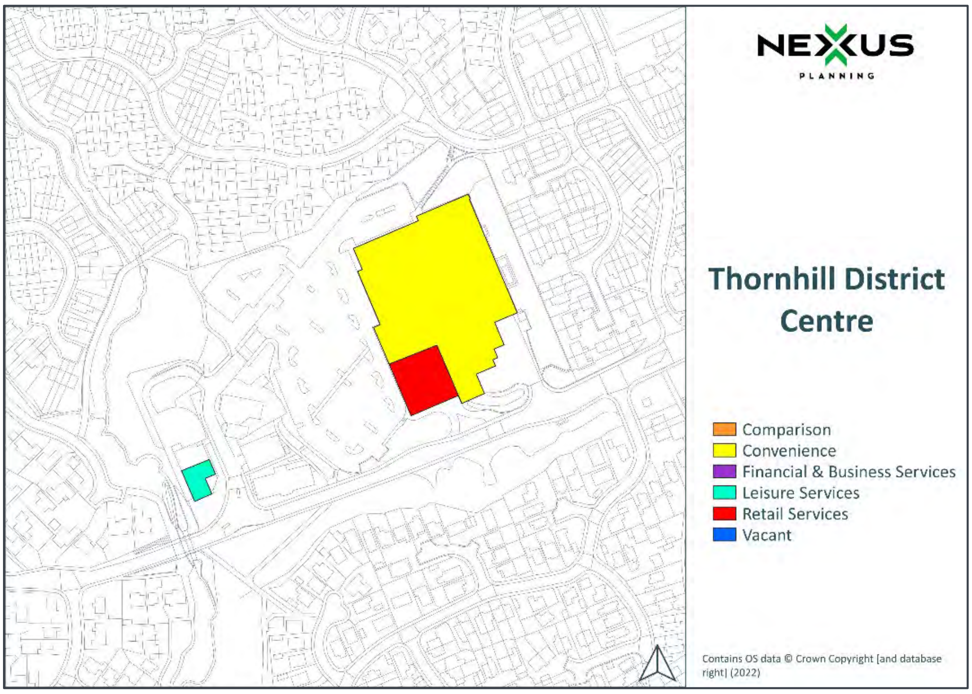
8.122 Thornhill District Centre is located to the far north of the Cardiff City Area, approximately 7 kilometres from the City Centre.

Figure 8.122.1 **Photos of Thornhill**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 8.122.2 **Thornhill Composition Map**



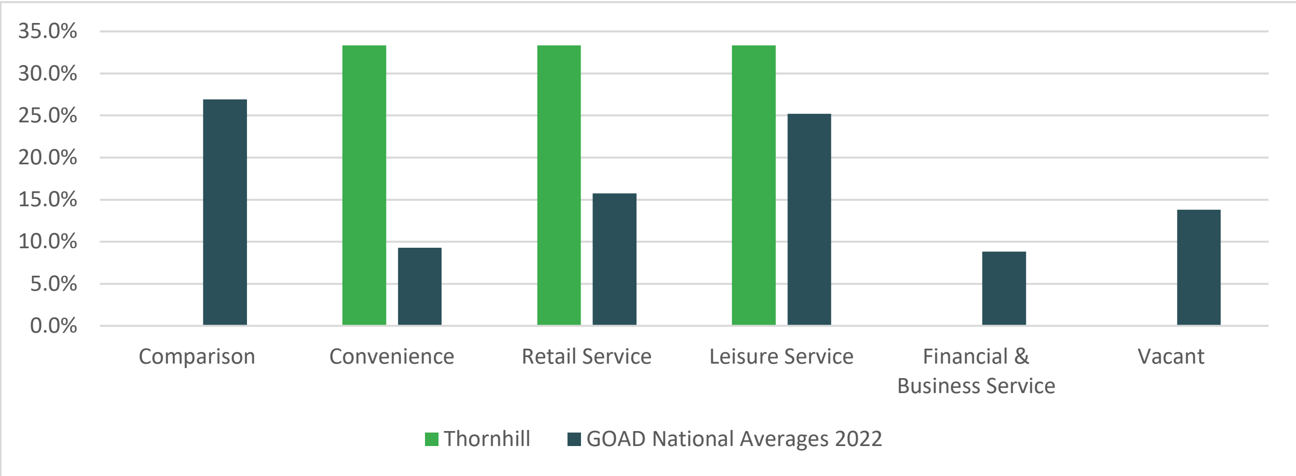
8.123 The District Centre comprises just three units which are in town centre use, as detailed above.

8.124 The centre comprises a large Sainsbury's food store, an Explore Learning, and a coffee shop attached to Thornhill Church. The centre also contains a petrol station and a medical centre. There are no vacant units.

Figure 8.124.1 **Thornhill Composition Table**

Categories	Thornhill 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	0	0.0%	26.9%
Convenience	1	33.3%	9.3%
Services (Total)	1	66.6%	49.8%
Retail	0	33.3%	15.8%
Leisure	1	33.3%	25.2%
Financial & Business	0	0.0%	8.8%
Vacant	0	0.0%	13.8%
TOTAL	3	100.0%	100.0%

Figure 8.124.2 **Thornhill Composition Graph**



Environmental Quality

8.125 The environmental quality of the centre is generally good, notwithstanding the large expanse of car park supporting the Sainsbury's store. Boundary and aisle-end planting has been carefully considered and the footpaths between different parts of the centre are pleasant and green.

8.126 The centre appears well kept and there was no evidence of litter or graffiti.

Perception of Safety

8.127 The centre feels safe, with minimal conflict between cars moving at low speeds and pedestrians.

8.128 There are no uses which extend late into the evening.

Accessibility and Pedestrian Flow

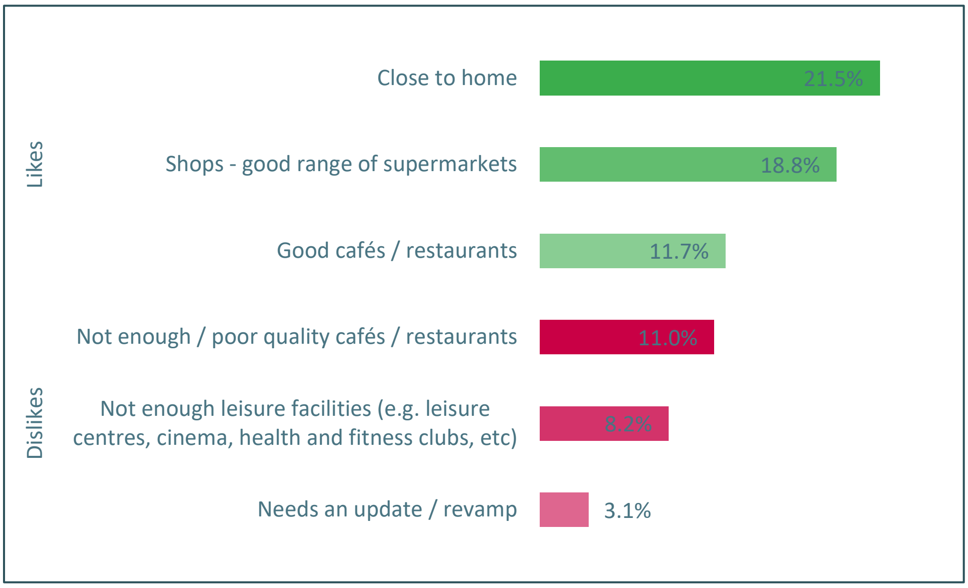
8.129 The vast majority of pedestrian flow occurs outside the Sainsbury's store, though the café/church also has a regular flow of foot and vehicle traffic.

8.130 According to survey responses, car is the most popular method of travel to the centre (80.7%). 9.6% and 7.9% of survey respondents travel by bus and on foot, respectively.

Public Opinion

8.131 Results from the household survey identified the top "likes" and "dislikes" of Thornhill, as seen below.

Figure 8.131.1 **Thornhill Public Opinion**



Rents

8.132 The CoStar Retail Report 2022 identifies the market rent per square foot to be £16.41.

Figure 8.132.1 **Market rent per SF for Thornhill**

Source: CoStar Retail Report 2022

Summary of Key Issues

8.133 Thornhill is a pleasant but limited District Centre. With just three units, it is by far the smallest of all Cardiff's District Centres and as a result its trade is dominated by the performance of the incumbent Sainsbury's store. Variety of offer was understandably the main issue flagged by household survey respondents.

Whitchurch Road

Description

8.134 Whitchurch Road is a designated district centre. It is linear in nature, hosting 109 units.

Figure 8.134.1 **Photos of Whitchurch Road**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 8.134.2 **Whitchurch Road Composition Map**

8.135 The comparison offer consists of 19 units, which makes up 17.4% of the total offer, which is significantly lower than the UK average (26.9%).

8.136 8.3% (9 units) of total units are convenience, which is slightly lower than the UK average (9.3%). This includes a Sainsbury's and a Co-op, and a number of independent retailers.

8.137 Services make up 67.0% (73 units) of the total offer, which is significantly above to the UK average (49.8%).

a. Retail services make up 22.9% (25 units) of the total offer, which is much higher than the UK average (15.8%).

b. Leisure services make up 29.4% (32 units) of the total number of units, which is higher than the UK average (25.2%). The household survey indicated that one of the key likes about the centre are its cafes and restaurants.

c. Financial & Business Services make up 14.7% (16 units), which is higher than the UK average (8.8%).

8.138 8 units are vacant, which is 7.3% of the total offer. This is significantly lower than the UK average (13.8%).

Figure 8.138.1 **Whitchurch Road Composition Table**

Categories	Whitchurch Road 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	19	17.4%	26.9%
Convenience	9	8.3%	9.3%
Services (Total)	73	67.0%	49.8%
Retail	25	22.9%	15.8%
Leisure	32	29.4%	25.2%
Financial & Business	16	14.7%	8.8%
Vacant	8	7.3%	13.8%
TOTAL	109	100.0%	100.0%

Figure 8.138.2 **Whitchurch Road Composition Graph**

Environmental Quality

8.139 The quality of environment is average. The overall appearance of the centre could be improved, with some buildings looking tired and in need for upkeep/repair. Improved cleaning is needed with litter, graffiti and weeds on pavement present. The centre is also dominated by parked cars, which take away from the overall appearance. The centre would also benefit from additional landscaping and greenery.

Perception of Safety

8.140 The centre has a safe feel with no noticeable signs of day-time antisocial behaviour. No noticeable CCTV was present.

Accessibility and Pedestrian Flow

8.141 The centre is flat, mostly linear and is easy to navigate. However, it has narrow and in place uneven pavements which impede pedestrian flow. It is also dominated by traffic, and on-street parking which further impede pedestrian flow. Lack of parking and traffic congestion have been identified by the household survey as the top issues. There are no cycle lanes, but some cycle parking is present.

Public Opinion

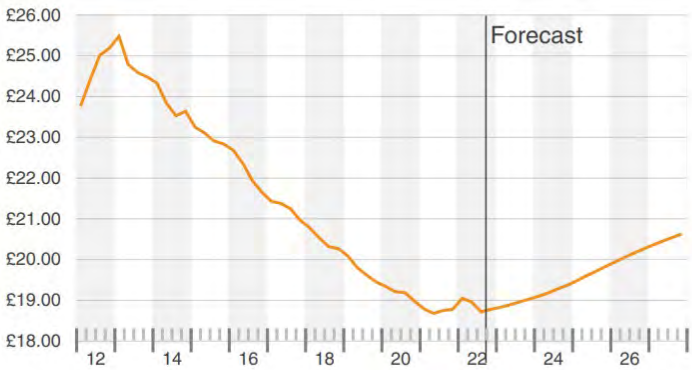
8.142 Results from the household survey identified the top "likes" and "dislikes" of the city centre, as seen below.

Figure 8.142.1 **Whitchurch Road Public Opinion**

Rents

8.143 The CoStar Retail Report 2022 identifies the market rent per square foot to be £18.71.

Figure 8.143.1 **Market rent per SF for Whitchurch Road**



Source: CoStar Retail Report 2022

Summary of Key Issues

8.144 Whitchurch Road District Centre has a good convenience and services offer; and the vacancy levels are low. However, its environmental quality is in need of improvement in terms of street cleaning and façade maintenance, as well as more landscaping. Lack of parking, car dominance and traffic congestion are also a concern.

9. Local Centre Health-Checks

Birchgrove

Description

9.1 Birchgrove is one of the larger local centres, located centrally to the city, approximately 3 kilometres to the north of the city centre.

Figure 9.1.1 **Photos of Birchgrove**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 9.1.2 **Birchgrove Composition Map**

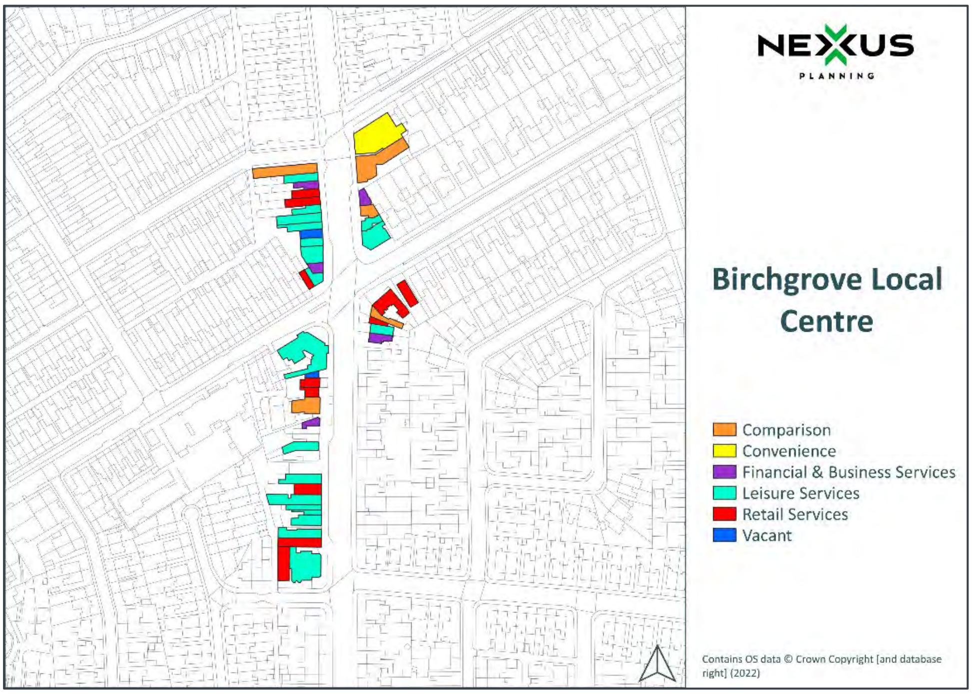
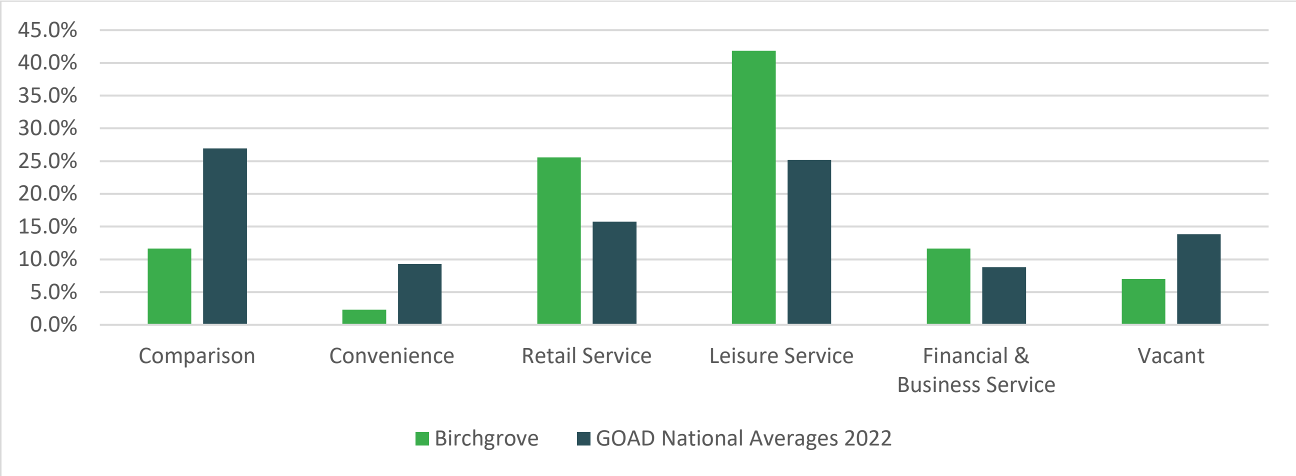


Figure 9.1.3 **Birchgrove Composition Table**

Categories	Birchgrove 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	5	11.6%	26.9%
Convenience	1	2.3%	9.3%
Services (Total)	34	79.1%	49.8%
Retail	*11*	*25.6%*	*15.8%*
Leisure	*18*	*41.9%*	*25.2%*
Financial & Business	*5*	*11.6%*	*8.8%*
Vacant	3	7.0%	13.8%
TOTAL	43	100.0%	100.0%

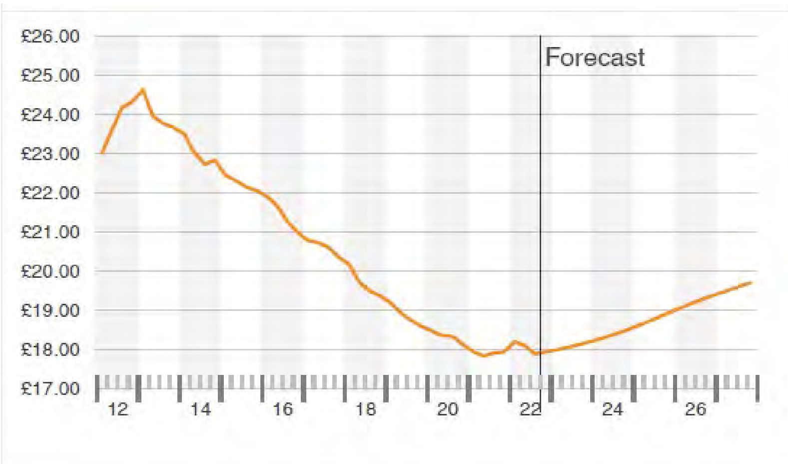
Figure 9.1.4 **Birchgrove Composition Graph**



Rents

9.2 The CoStar Retail Report 2022 identifies the market rent per square foot to be £17.88.

Figure 9.2.1 **Market rent per SF for Birchgrove**



Source: CoStar Retail Report 2022

Assessment

9.3 Birchgrove is a heavily car-orientated centre. It is linear to Caerphilly Road and operates on a short-stay on-street parking basis. As a result, the composition of the centre is heavily service-based, with over 79% of units in this sector. Most visitors are observed to be visiting one or two units for their service needs, rather than accessing multiple units or spending long periods of time in the centre. Common with this theme, there is a strong leisure service presence, with a large number of take-away units present in the centre. This is likely to be a result of the significant walk-in catchment area of the centre, and the through-route nature of the centre, making it easy for commuters to stop quickly and carry on with their journey.

9.4 Being so heavily trafficked, the environmental quality of the centre is low, with several difficult crossing points required to access the full run of the centre. The junction of Caerphilly Road and Heathwood Road is especially busy. Notwithstanding, the centre is generally well kept, with little evidence of litter or graffiti.

9.5 Pedestrian flows were fairly quiet during the daytime throughout the centre, with a more visible footfall in the evening. The number 27 bus route connects the centre with Cardiff City Centre to the south.

Bute Street (Loudoun Square)

Description

9.6 Bute Street is a small local centre located on Bute Street and Loudoun Square, located to the south of the city centre.

Figure 9.6.1 **Photos of Bute Street (Loudoun Square)**

Source: Google Maps, 2020

GOAD Composition and Vacancies

Figure 9.6.2 **Bute Street (Loudoun Square) Composition Map**

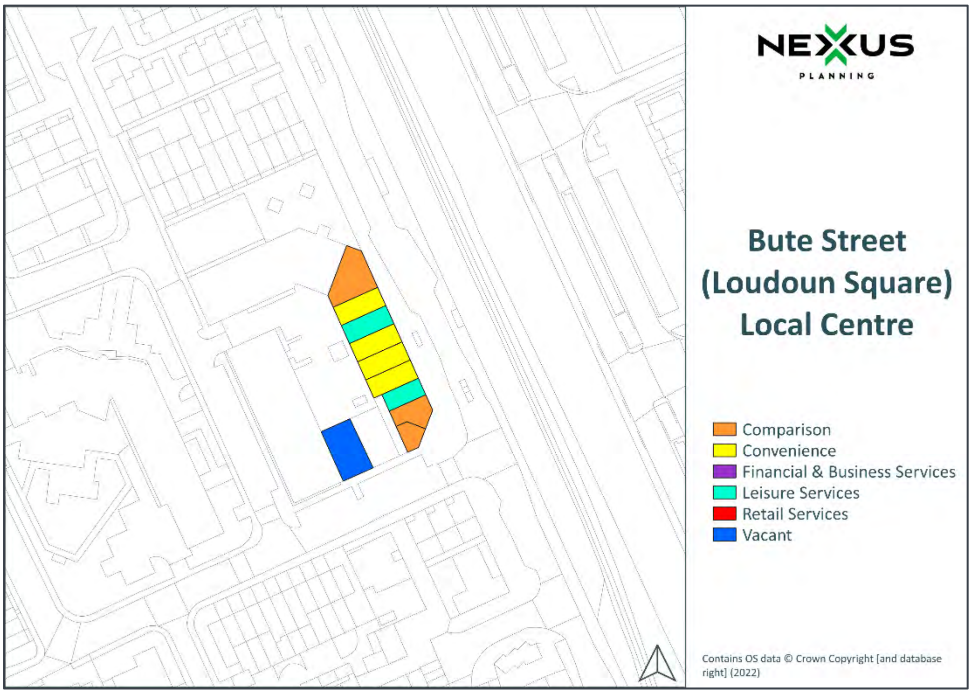
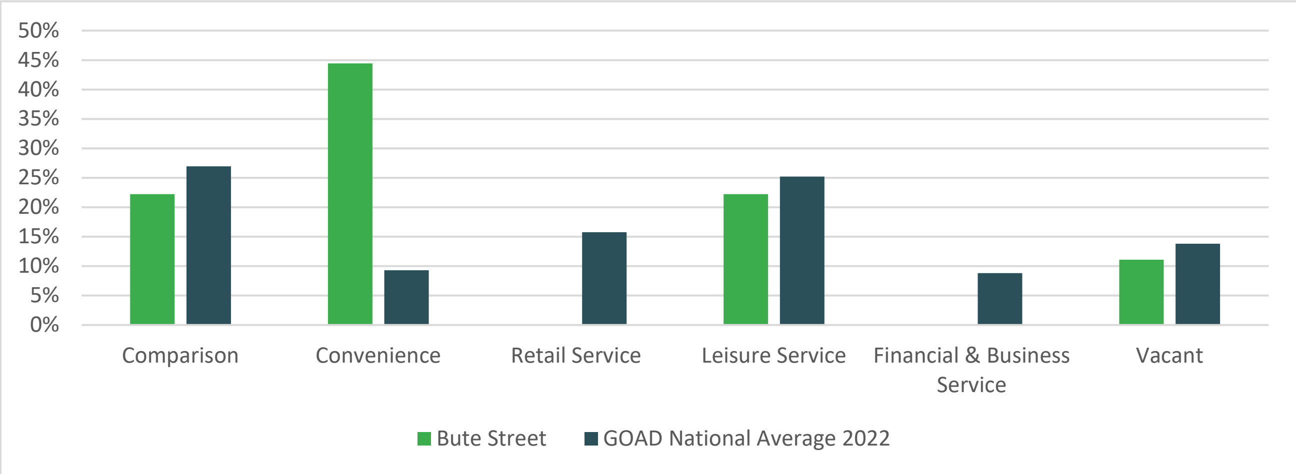


Figure 9.6.3 **Bute Street Composition Table**

Categories	Bute Street 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	2	22.2%	26.9%
Convenience	4	44.4%	9.3%
Services (Total)	2	22.2%	49.8%
Retail	*0*	*0.0%*	*15.8%*
Leisure	*2*	*22.2%*	*25.2%*
Financial & Business	*0*	*0.0%*	*8.8%*
Vacant	1	11.1%	13.8%
TOTAL	9	100.0%	100.0%

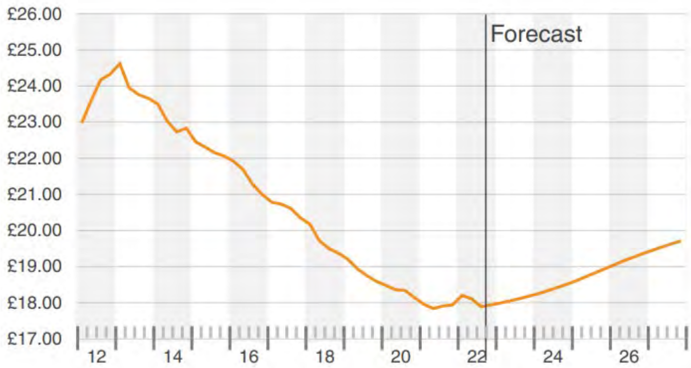
Figure 9.6.4 **Bute Street Composition Graph**



Rents

9.7 The CoStar Retail Report 2022 identifies the market rent per square foot to be £17.88.

Figure 9.7.1 **Market rent per SF for Birchgrove**



Source: CoStar Retail Report 2022

Assessment

9.8 The centre's offer is small and underwhelming. It includes a pharmacy, a butchers/greengrocers and a few convenience stores.

9.9 Though the centre is relatively modern, it does not feel particularly well cared for. Some benches and bins are provided. To the north of the centre is an open paved area with some greenery, though this area appears to be underutilised.

9.10 The centre is fairly accessible to pedestrians, as pavements are wide and traffic levels are relatively low. Free parking on side streets is available for visitors arriving by car. A bus stop outside the front of the centre provides regular services to the city centre. Cycle racks are provided in the paved area at the north of the centre, though there are no cycle lanes and streets are also narrow, which may hinder movement.

Caerau Lane

Description

9.11 Caerau Lane is a small local centre located in the west of Cardiff, in the residential area of Caerau.

Figure 9.11.1 **Photos of Caerau Lane**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 9.11.2 **Caerau Lane Composition Map**

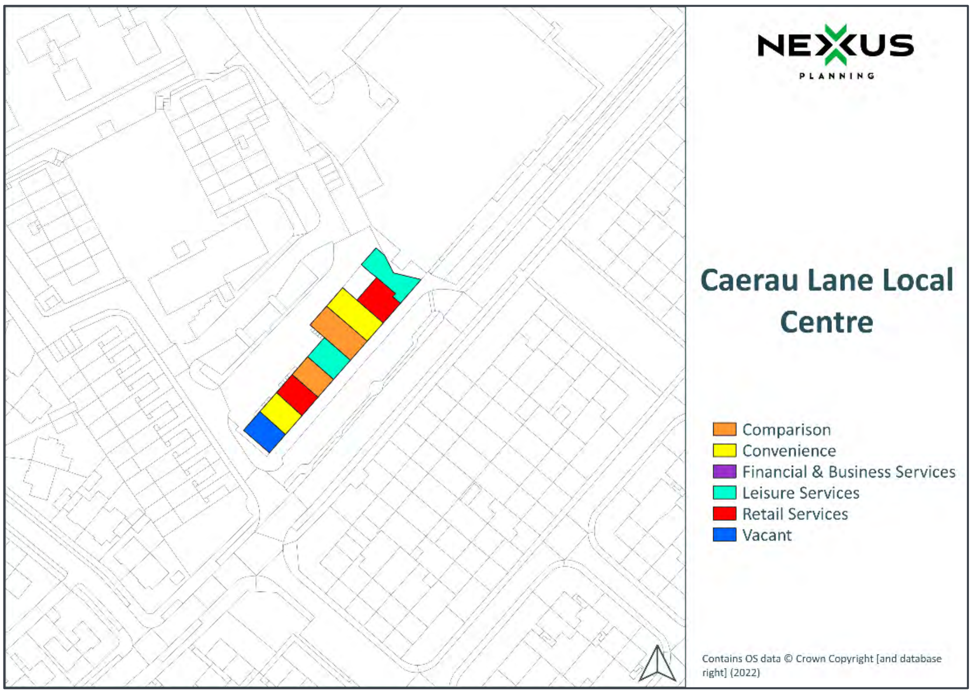
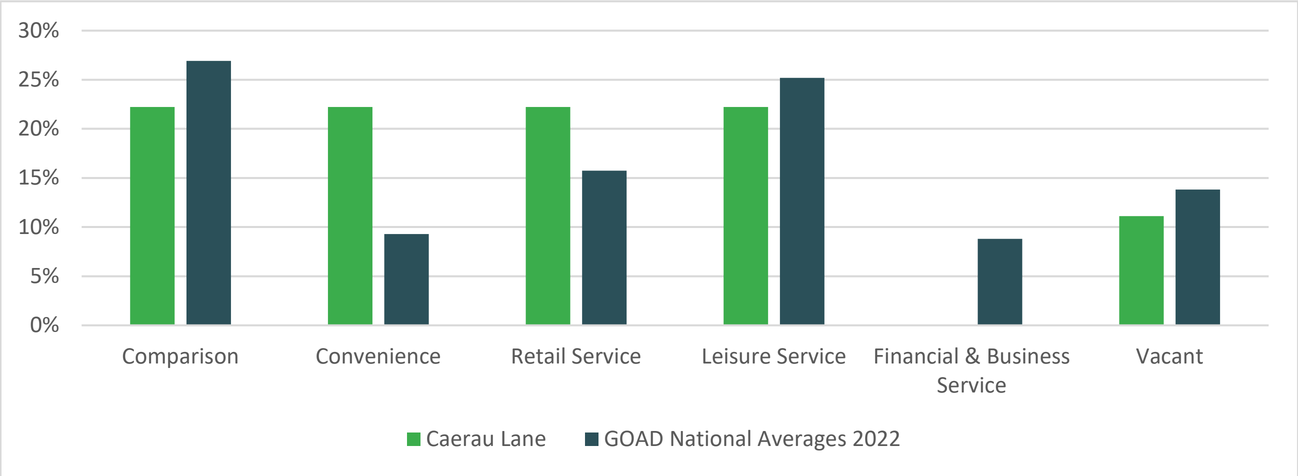


Figure 9.11.3 **Caerau Lane Composition Table**

Categories	Caerau Lane 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	2	22.2%	26.9%
Convenience	2	22.2%	9.3%
Services (Total)	4	44.4%	49.8%
Retail	*2*	*22.2%*	*15.8%*
Leisure	*2*	*22.2%*	*25.2%*
Financial & Business	*0*	*0%*	*8.8%*
Vacant	1	11.1%	13.8%
TOTAL	9	100.0%	100.0%

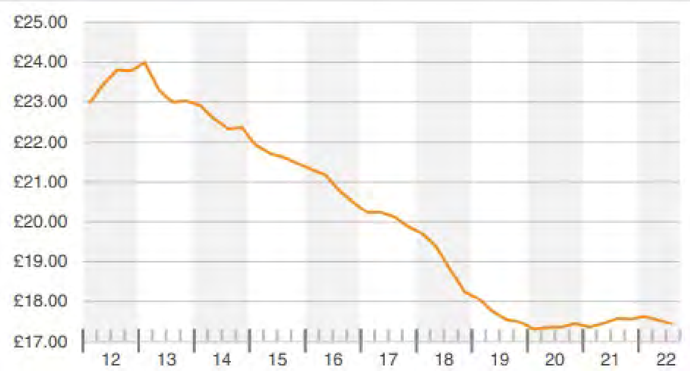
Figure 9.11.4 **Caerau Lane Composition Graph**



Rents

9.12 The CoStar Retail Report 2022 identifies the market rent per square foot to be £17.42.

Figure 9.12.1 **Market rent per SF for Caerau Lane**



Source: CoStar Retail Report 2022

Assessment

9.13 Units present in Caerau Lane are primarily for everyday local needs, such as convenience stores, a pharmacy and a takeaway.

9.14 Several units are not in operation during the daytime, and there are few pedestrians as a result, giving the centre a quiet feel.

9.15 The centre is generally clean and bins are provided, but shop frontages look outdated and some graffiti is present, giving the centre a rundown appearance.

9.16 Free parking is available on-street. Pavements are wide and the centre is set back from the main road, so the area is safe and accessible for pedestrians. Bus stops around 200m to the north and south-west of the centre offer services to Cardiff city centre, though these services are fairly infrequent.

Cathedral Road

Description

9.17 Cathedral Road is a local centre located along Cathedral Road and Pontcanna Road in the Pontcanna area of Cardiff, to the north-west of the city centre. It is in close proximity to Llandaff Fields.

Figure 9.17.1 **Photos of Cathedral Road**

Source: Google Maps (2021 & 2022)

GOAD Composition and Vacancies

Figure 9.17.2 **Cathedral Road Composition Map**

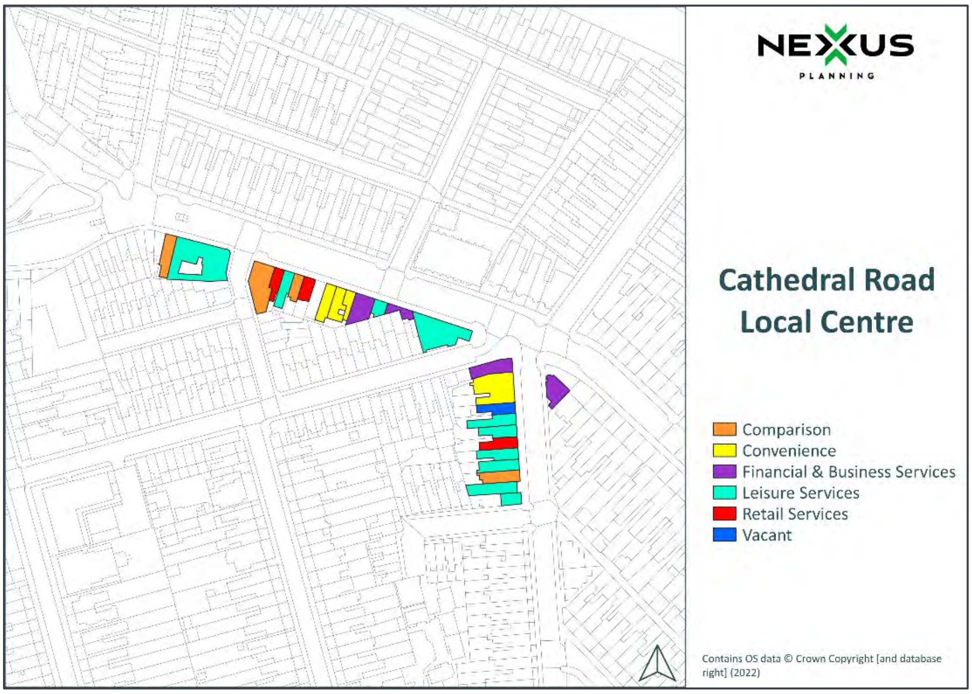
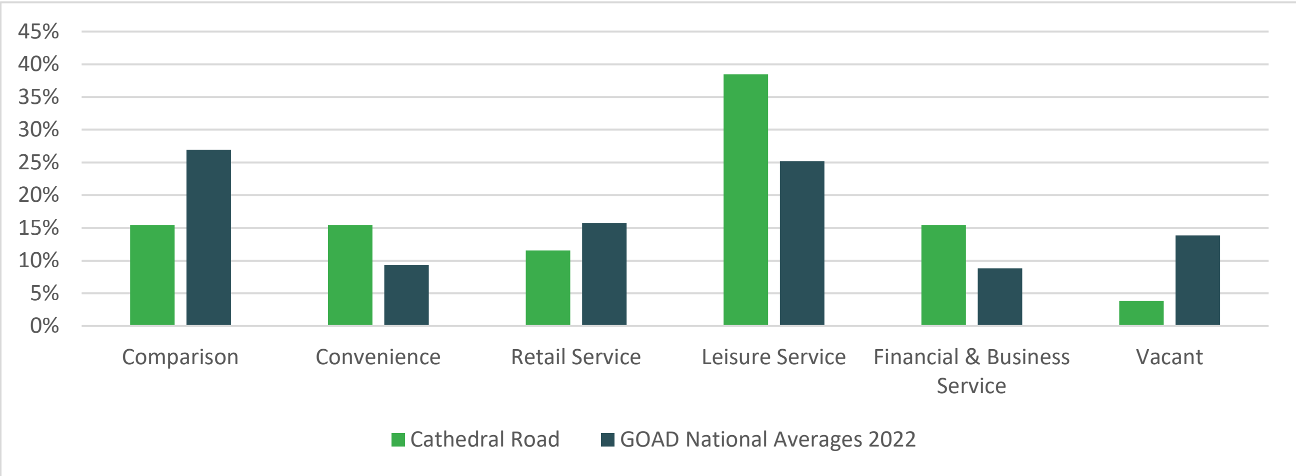


Figure 9.17.3 **Cathedral Road Composition Table**

Categories	Cathedral Road 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	4	15.4%	26.9%
Convenience	4	15.4%	9.3%
Services (Total)	17	65.4%	49.8%
Retail	*3*	*11.5%*	*15.8%*
Leisure	*10*	*38.5%*	*25.2%*
Financial & Business	*4*	*15.4%*	*8.8%*
Vacant	1	3.9%	13.8%
TOTAL	26	100.0%	100.0%

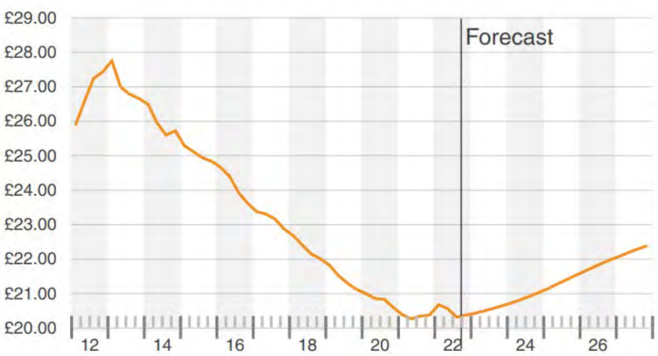
Figure 9.17.4 **Cathedral Road Composition Graph**



Rents

9.18 The CoStar Retail Report 2022 identifies the market rent per square foot to be £20.31.

Figure 9.18.1 **Market rent per SF for Cathedral Road**



Source: CoStar Retail Report 2022

Assessment

9.19 Units in Cathedral Road are typically high-end, independent retailers. The comparison offer is particularly diverse and includes a bike shop, a music shop and a jewellery shop. The overall offer is fairly leisure-dominated, with a particular focus on cafes.

9.20 The centre is a pleasant area to visit. Shopfronts appear modern and well cared for. Trees and planters also add to the environment.

9.21 Pedestrian movement is relatively easy, as pavements are wide, though at points these are blocked by outdoor seating. Congestion levels are relatively high on Cathedral Road, but lower along Pontcanna Road. Finding a space to park can be difficult, as only on-street parking is available, and at points some parking has been converted into space for outdoor dining. A bus stop to the west of the centre offers frequent services into the city centre. Although there are no cycle lanes, some cycle racks are provided, and an OVO cycle station is located in the west of the centre.

9.22 The centre feels very safe and there are many pedestrians around.

Countisbury Avenue

Description

9.23 Countisbury Avenue is located in the suburb of Llanrumney, to the north-east of the council area. It is appropriately 6 kilometres from the city centre.

Figure 9.23.1 **Photos of Countisbury Avenue**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 9.23.2 **Countisbury Avenue Composition Map**

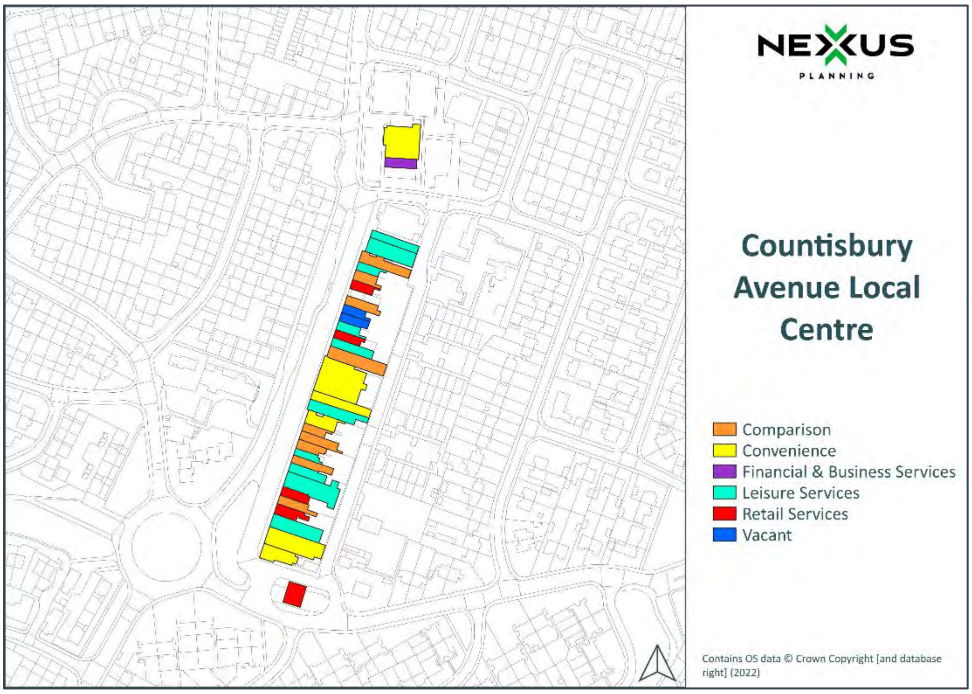
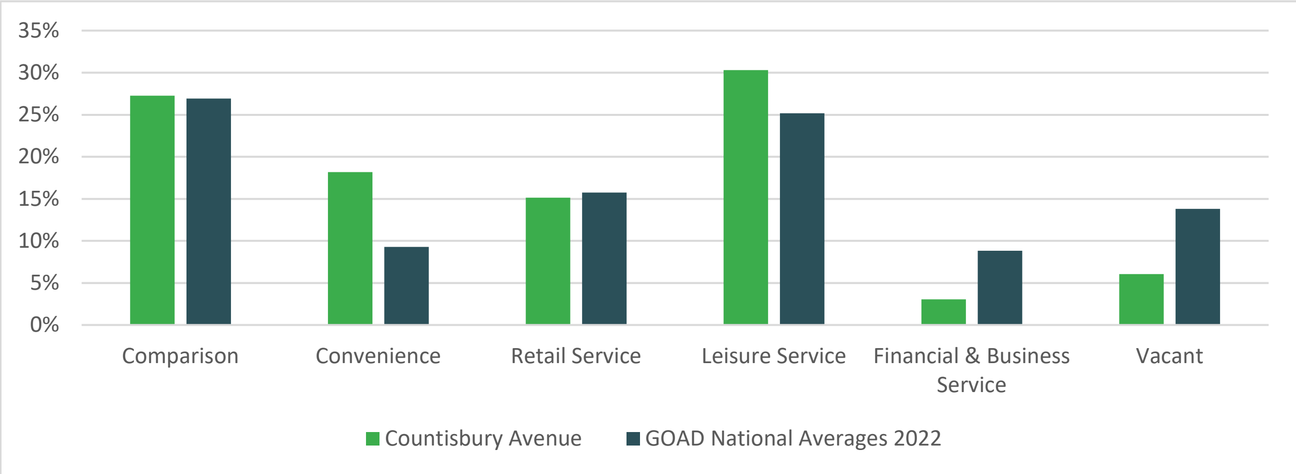


Figure 9.23.3 **Countisbury Avenue Composition Table**

Categories	Countisbury Avenue 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	9	27.3%	26.9%
Convenience	6	18.2%	9.3%
Services (Total)	16	48.5%	49.8%
Retail	*5*	*15.2%*	*15.8%*
Leisure	*10*	*30.3%*	*25.2%*
Financial & Business	*1*	*3.0%*	*8.8%*
Vacant	2	6.1%	13.8%
TOTAL	33	100.0%	100.0%

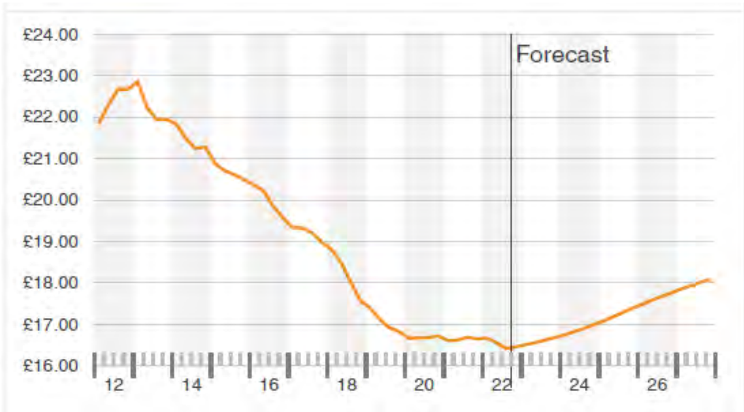
Figure 9.23.4 **Countisbury Avenue Composition Graph**



Rents

9.24 The CoStar Retail Report 2022 identifies the market rent per square foot to be £16.41.

Figure 9.24.1 **Market rent per SF for Countisbury Avenue**



Source: CoStar Retail Report 2022

Assessment

9.25 Countisbury Avenue is a busy local centre with low levels of vacancy, at around half the UK average. The centre is relatively bustling and, whilst dated in appearance for its main part, is well looked after and benefits from being set-back from the main road. Parade style parking, and two-storey residential living above the main rank of units, means that the centre has a compact and tight-knit feel.

9.26 Whilst the centre itself does not have any greenery, there is public space opposite and across the five-way roundabout linking Countisbury Avenue with routes to the west and south. We observed some evidence of littering, but generally speaking the centre was well cared for and there was no evidence of graffiti. The centre has a safe feel.

9.27 The centre provides well for convenience shopping, with 6 units in total, including both Iceland and Co-op foodstores.

9.28 Dedicated cycle parking is provided immediately opposite Greggs, and the centre benefits from a bus stop serving the no 65 bus route connecting areas east of Cardiff with the city centre.

Fairwater Green

Description

9.29 Fairwater Green is a small local centre located in the residential area of Fairwater, to the west of Cardiff.

Figure 9.29.1 **Photos of Fairwater Green**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 9.29.2 **Fairwater Green Composition Map**

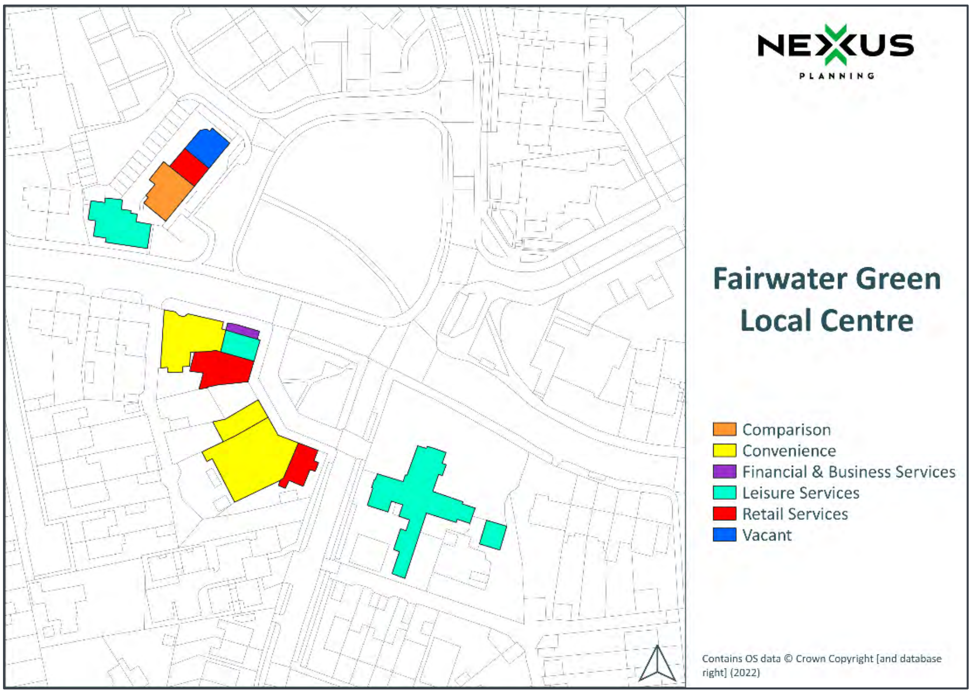
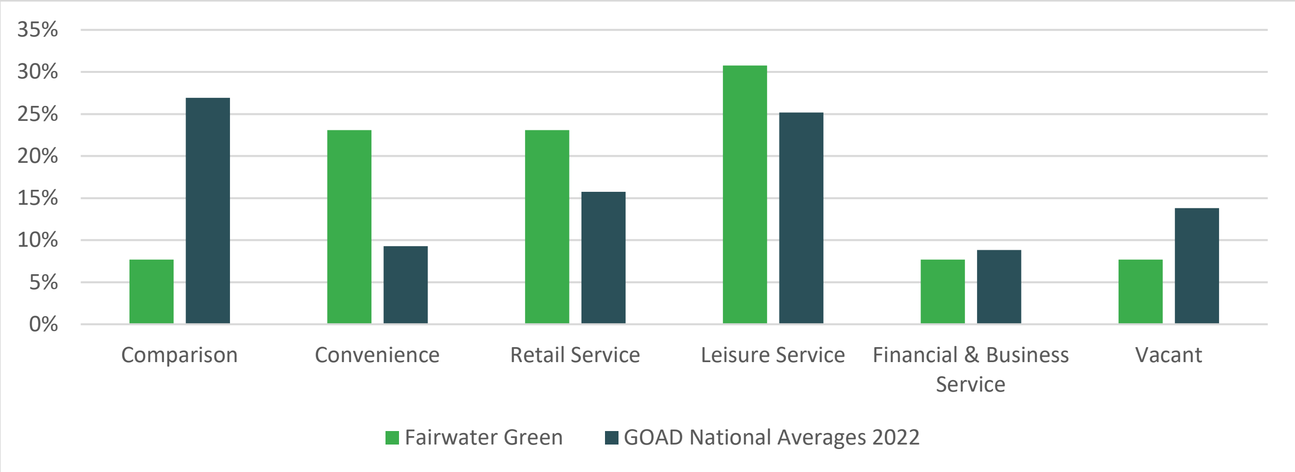


Figure 9.29.3 **Fairwater Green Composition Table**

Categories	Fairwater Green 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	1	7.7%	26.9%
Convenience	3	23.1%	9.3%
Services (Total)	8	61.5%	49.8%
Retail	3	23.1%	15.8%
Leisure	4	30.8%	25.2%
Financial & Business	1	7.7%	8.8%
Vacant	1	7.7%	13.8%
TOTAL	13	100.0%	100.0%

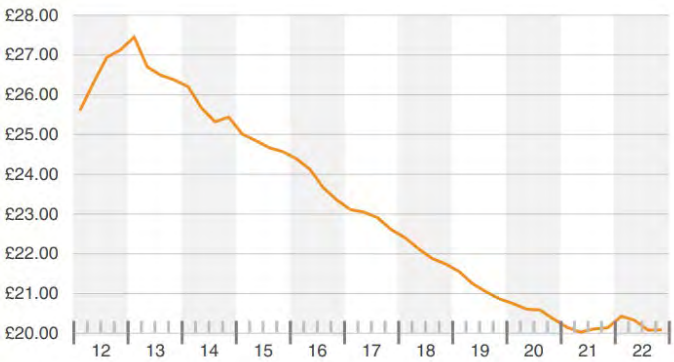
Figure 9.29.4 **Fairwater Green Composition Graph**



Rents

9.30 The CoStar Retail Report 2022 identifies the market rent per square foot to be £20.07.

Figure 9.30.1 **Market rent per SF for Fairwater Green**



Source: CoStar Retail Report 2022

Assessment

9.31 The units are a mix of independent retailers and national retailers, such as Spar, Lloyds Pharmacy and Ladbrokes. The convenience offer is anchored by a Co-op shop.

9.32 The traditional buildings around Fairwater Green give the centre a quaint character. The centre benefits from two grassed areas; a smaller area opposite the shop units, and the larger Fairwater Green to the north. Some benches and bins are provided throughout.

9.33 Pedestrian movement around the centre is hindered somewhat by narrow pavements. Congestion is also an issue due to relatively high traffic levels, narrow roads and few parking spaces. Bus stops to the east of the centre provide regular services to the city centre. There are some cycle lanes in the centre, but these are often poorly marked and therefore not always visible. There are also some cycle racks and an OVO bike station.

9.34 The centre feels safe due to the large number of pedestrians in the vicinity.

Gabalfa Avenue

Description

9.35 Gabalfa Avenue Local Centre is located fairly centrally to the city, some 2.5 kilometres north of Cardiff city centre.

Figure 9.35.1 **Photos of Gablfa Avenue**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 9.35.2 **Gabalfa Avenue Composition Map**

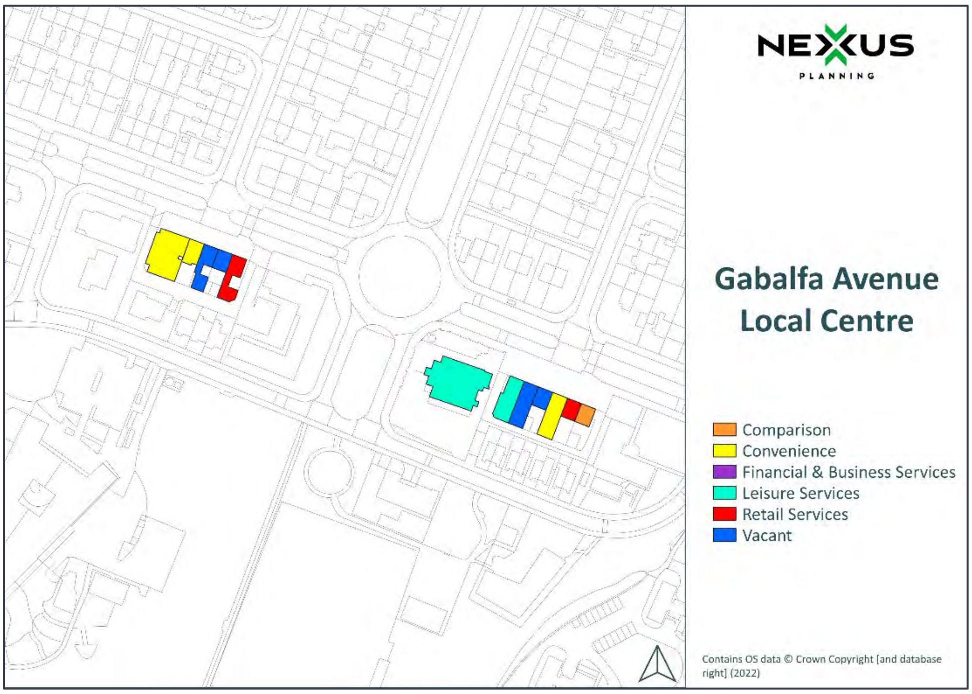
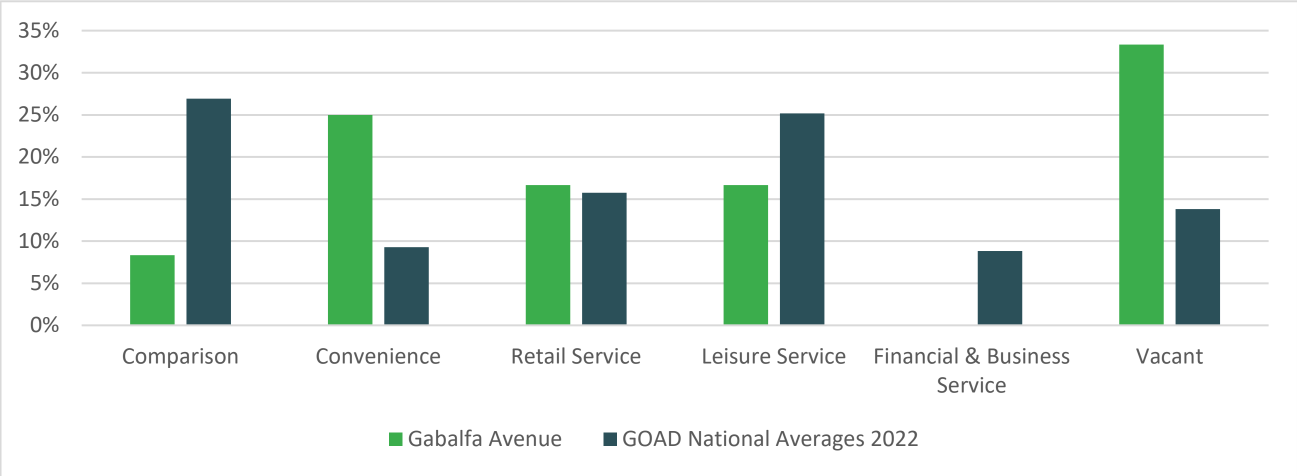


Figure 9.35.3 **Gabalfa Avenue Composition Table**

Categories	Gabalfa Avenue 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	1	8.3%	26.9%
Convenience	3	25.0%	9.3%
Services (Total)	4	33.3%	49.8%
Retail	*2*	*16.7%*	*15.8%*
Leisure	*2*	*16.7%*	*25.2%*
Financial & Business	*0*	*0.0%*	*8.8%*
Vacant	4	33.3%	13.8%
TOTAL	12	100.0%	100.0%

Figure 9.35.4 **Gabalfa Avenue Composition Graph**



Rents

9.36 The CoStar Retail Report 2022 identifies the market rent per square foot to be £19.31.

Figure 9.36.1 **Market rent per SF in Gabalfa Avenue**

Source: CoStar Retail Report 2022

Assessment

9.37 This small Local Centre is distinct in nature, owing to it being split into two parts either side of a green space bordered by Cathedral View. The centre has two runs of identical units either side of a roundabout and is verdant in its surrounds with extensive tree planting along the street, and school playing fields immediately adjacent.

9.38 Notwithstanding its pleasant and green surrounds, the fabric of the centre itself is tired and run-down. Footfall was observed to be very low, with a third of units vacant. The centre provides for the basic needs of the local population and incorporates the Emmanuel Baptist Church, a public house and a post office at its core.

9.39 A bus stop operates from Gabalfa Avenue itself, and there are some basic cycle stands at either end of the centre.

Grand Avenue

Description

9.40 Grand Avenue is a local centre located in the residential area of Ely, in the west of Cardiff. It consists of a small row of shops set back from the main road.

Figure 9.40.1 **Photos of Grand Avenue**

Source: Nexus Site Visit (September 2022) and Google Maps (2018)

GOAD Composition and Vacancies

Figure 9.40.2 **Grand Avenue Composition Map**

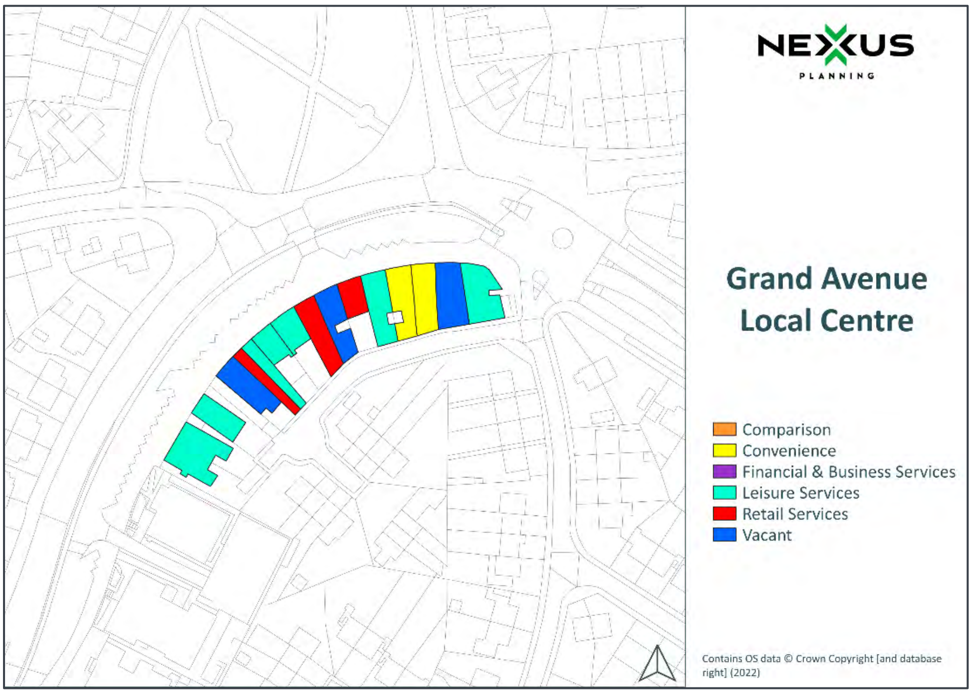
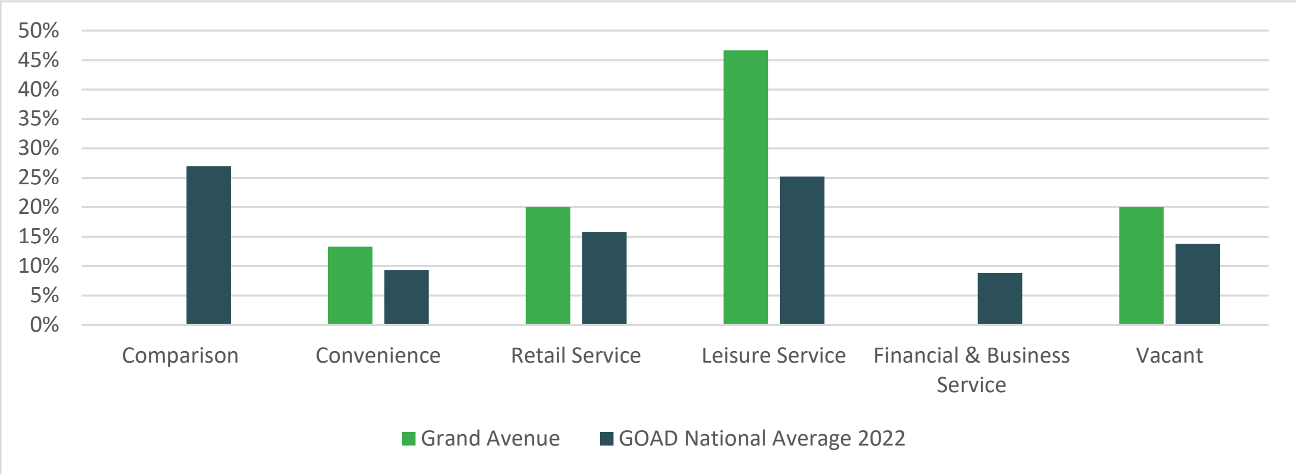


Figure 9.40.3 **Grand Avenue Composition Table**

Categories	Grand Avenue 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	0	0%	26.9%
Convenience	2	13.3%	9.3%
Services (Total)	10	66.7%	49.8%
Retail	*3*	*20.0%*	*15.8%*
Leisure	*7*	*46.7%*	*25.2%*
Financial & Business	*0*	*0%*	*8.8%*
Vacant	3	20.0%	13.8%
TOTAL	15	100.0%	100.0%

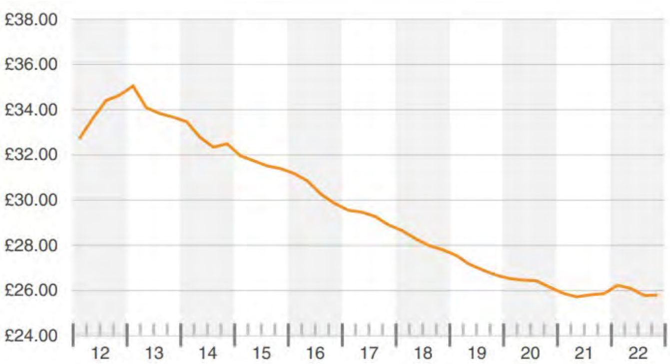
Figure 9.40.4 **Grand Avenue Composition Graph**



Rents

9.41 The CoStar Retail Report 2022 identifies the market rent per square foot to be £25.77.

Figure 9.41.1 **Market rent per SF for Grand Avenue**



Source: CoStar Retail Report 2022

Assessment

9.42 As seen in the composition data above, Grand Avenue's offer is very leisure dominated, though these are primarily takeaways and fast-food outlets. There are no comparison units, and the convenience offer is limited to two convenience stores.

9.43 The centre generally has a rundown appearance, as shopfronts appear dated. Greenery and benches are limited, though bins are provided throughout.

9.44 Grand Avenue has wide pavements and is set back from the main road, which aids the movement of pedestrians. Free car parking is available. Bus stops in the east of the centre offer regular services into the city centre. Cycling infrastructure is generally lacking, though there are a couple of cycle racks.

High Street, Llandaff

Description

9.45 Llandaff is located in the western suburbs of Cardiff, and is approximately 2.5 kilometres from the city centre.

Figure 9.45.1 **Photos of High Street, Llandaff**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 9.45.2 **High Street, Llandaff Composition Map**

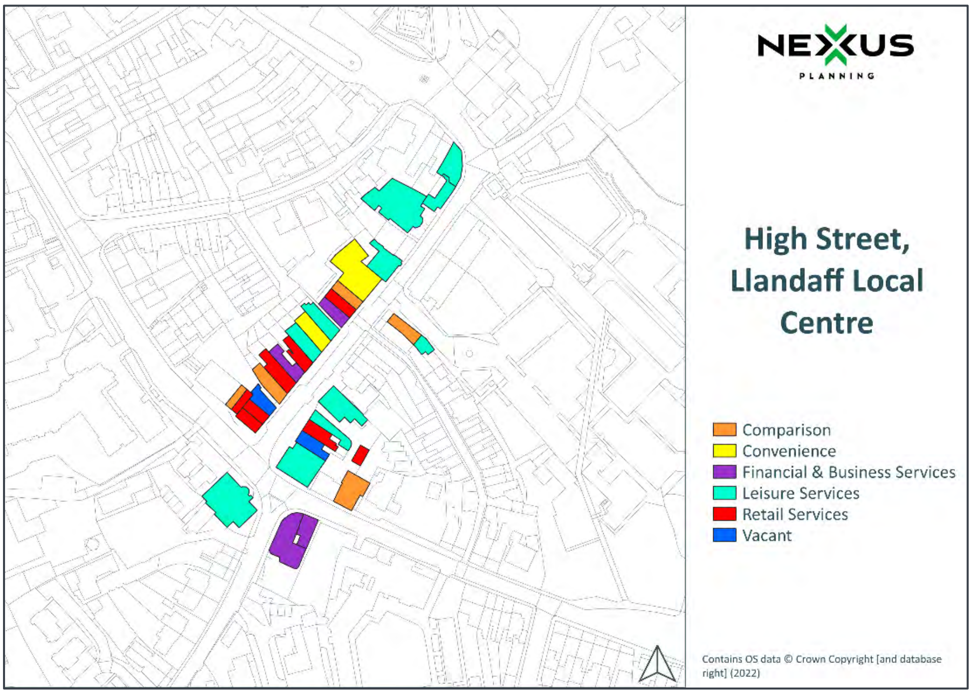
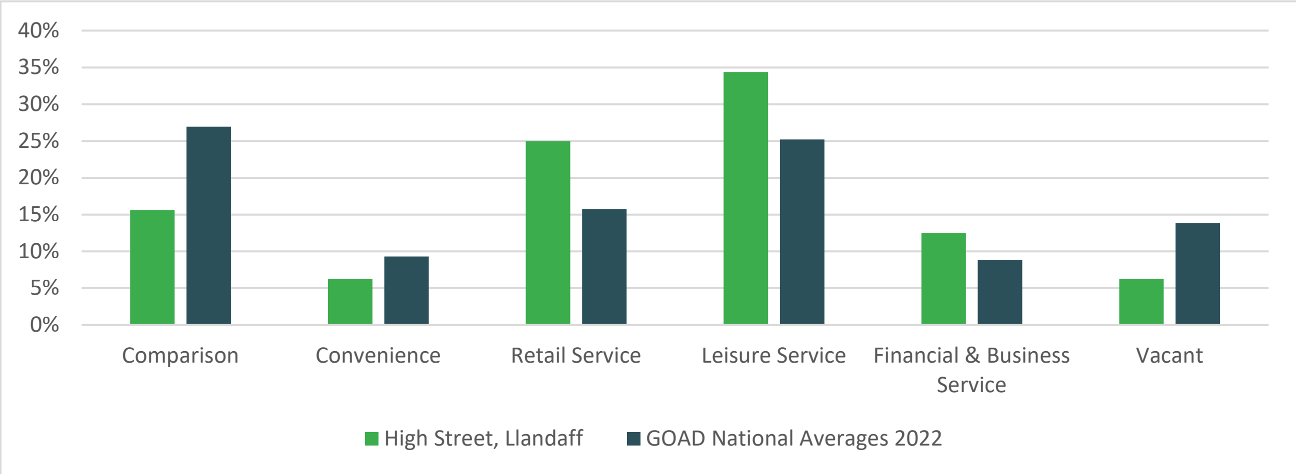


Figure 9.45.3 **High Street, Llandaff Composition Table**

Categories	High Street, Llandaff 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	5	15.6%	26.9%
Convenience	2	6.3%	9.3%
Services (Total)	21	71.9%	49.8%
Retail	*8*	*25.0%*	*15.8%*
Leisure	*11*	*34.4%*	*25.2%*
Financial & Business	*4*	*12.5%*	*8.8%*
Vacant	2	6.3%	13.8%
TOTAL	32	100.0%	100.0%

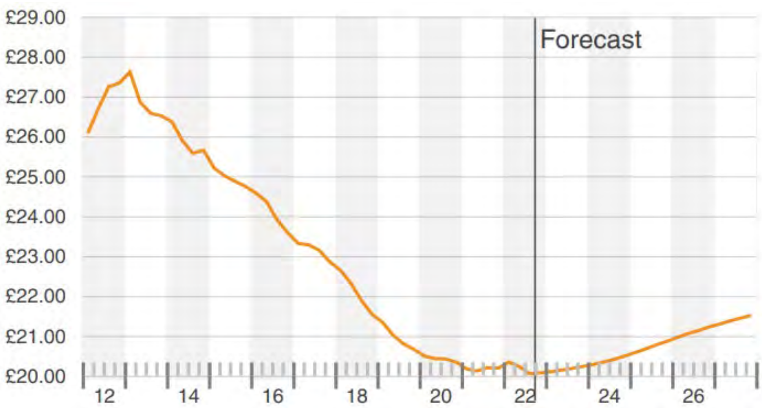
Figure 9.45.4 **High Street, Llandaff Composition Graph**



Rents

9.46 The CoStar Retail Report 2022 identifies the market rent per square foot to be £20.06.

Figure 9.46.1 **Market rent per SF in High Street, Llandaff**



Source: CoStar Retail Report 2022

Assessment

9.47 High Street, Llandaff is a small and compact centre. It is characterised by a high proportion of service uses (71.9%) which far exceeds UK averages. Especially notable is the provision of leisure uses (34.4% of units), which contributes to its feel as a bustling centre with high footfall. Vacancy rates are less than half the UK average.

9.48 The centre is picturesque with a number of attractive residential properties on one side, as well as well-maintained retail and leisure units on the other. The centre benefits from linked footfall to the nearby Llandaff Cathedral. The centre is lined with trees and street planters and has a number of pavement seating areas. There is no evidence of issues with litter or graffiti.

9.49 Some parking is provided on-street, though the centre is mainly provided for by an off-street pay and display car park (82 spaces). An OVO electric bike hire station is located at the junction of High Street with Cardiff Road. Bus stops are located on Cardiff Road, linking the centre with other suburbs to the north and west, and the city centre to the south.

Maelfa, Llanedeyrn

Description

9.50 Llanedeyrn is a suburb to the north-east of Cardiff. The centre has recently been redeveloped as part of the Maelfa Regeneration Scheme. This involved the demolition of the existing Maelfa Shopping Centre, the construction of 111 dwellings, the construction of nine new retail units and the provision of new parking spaces and public spaces.

Figure 9.50.1 **Photos of Maelfa, Llanedeyrn**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 9.50.2 **Maelfa, Llanedeyrn Composition Map**

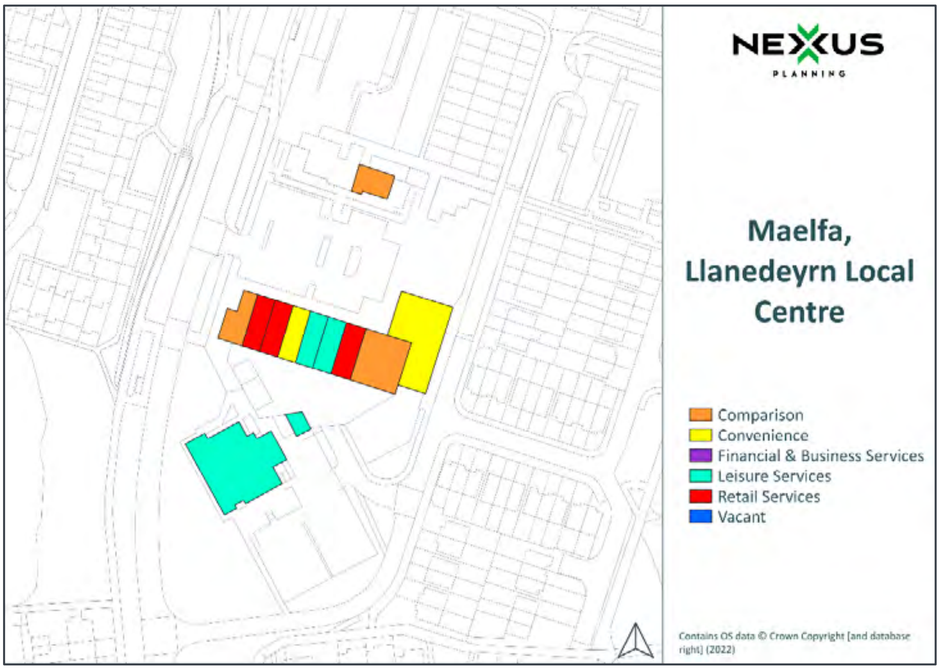
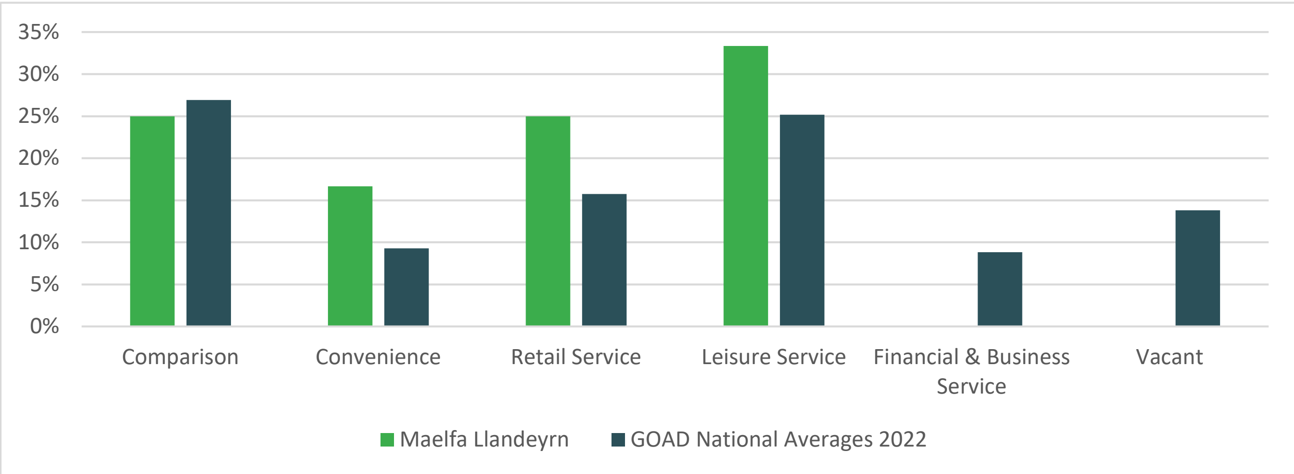


Figure 9.50.3 **Maelfa, Llanedeyrn Composition Table**

Categories	Maelfa, Llanederyn 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	3	25.0%	26.9%
Convenience	2	16.7%	9.3%
Services (Total)	7	58.3%	49.8%
Retail	3	25.0%	15.8%
Leisure	4	33.3%	25.2%
Financial & Business	0	0.0%	8.8%
Vacant	0	0.0%	13.8%
TOTAL	12	100.0%	100.0%

Figure 9.50.4 **Maelfa, Llanedeyrn Composition Graph**



Rents

9.51 CoStar data on rents is unavailable for Maelfa, Llanedeyrn local centre.

Assessment

9.52 Maelfa is a modern courtyard shopping centre built around a central car park, with residential living over the shop units. The centre functions well and has reasonable footfall, with no vacant units. A small Nisa foodstore anchors the centre.

9.53 Perception of safety is good during the daytime as there is plenty of overlooking from the surrounding residential and commercial developments. However the area is perhaps less welcoming in the evening and there is considerable evidence of litter in the central and pedestrianised areas of the centre.

9.54 There are nearby bus stops on Llanederyn Drive. However, the OVO cycling network does not cover this part of the city, with the nearest facility some distance away at the Cardiff MET Campus.

Newport Road, Rumney

Description

9.55 Newport Road is located in the suburb of Rumney, approximately 4 kilometres to the east of the city centre.

Figure 9.55.1 **Photos of Newport Road, Rumney**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 9.55.2 **Newport Rumney Composition Map**

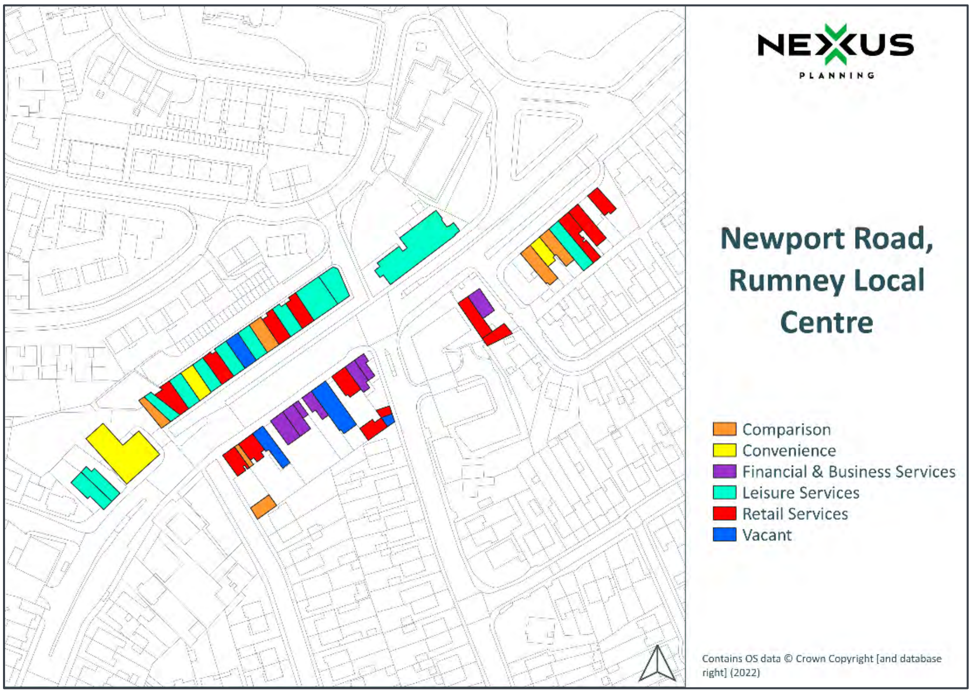
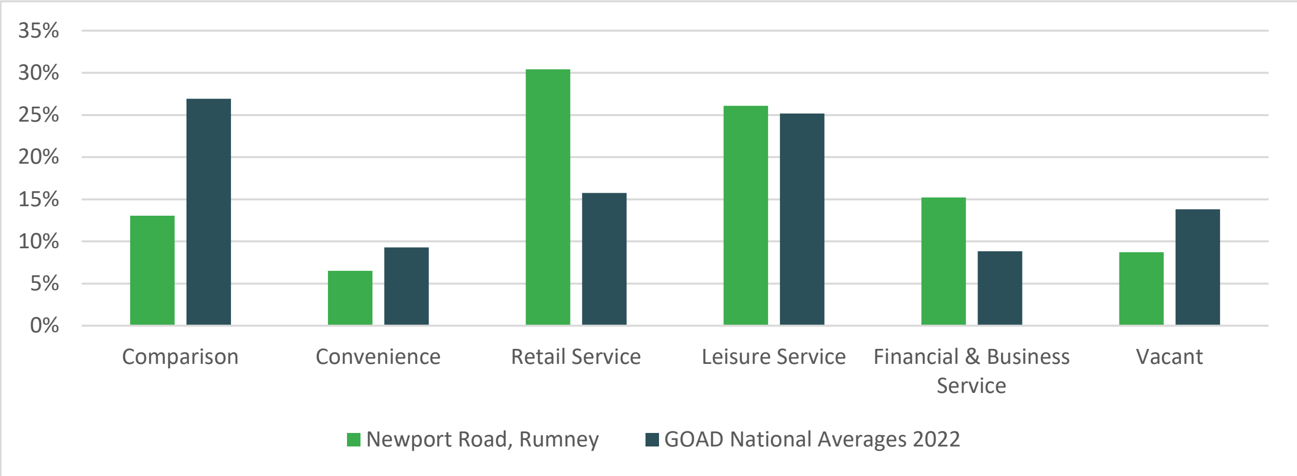


Figure 9.55.3 **Newport Road, Rumney Composition Table**

Categories	Newport Road, Rumney 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	6	13.0%	26.9%
Convenience	3	6.5%	9.3%
Services (Total)	33	71.7%	49.8%
Retail	*14*	*30.4%*	*15.8%*
Leisure	*12*	*26.1%*	*25.2%*
Financial & Business	*7*	*15.2%*	*8.8%*
Vacant	4	8.7%	13.8%
TOTAL	46	100.0%	100.0%

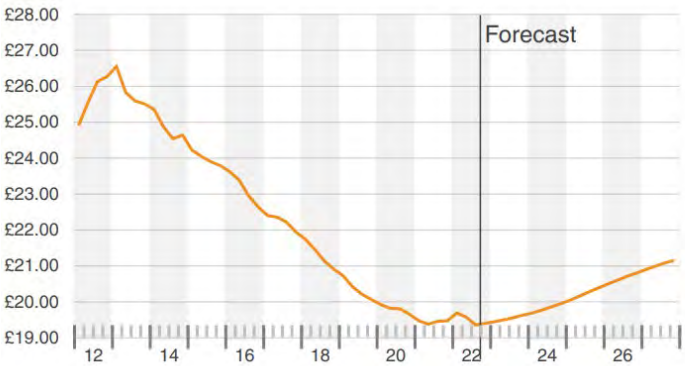
Figure 9.55.4 **Newport Road, Rumney Composition Graph**



Rents

9.56 The CoStar Retail Report 2022 identifies the market rent per square foot to be £19.35.

Figure 9.56.1 **Market rent per SF for Newport Road, Rumney**



Source: CoStar Retail Report 2022

Assessment

9.57 The centre is located on the busy B4487 Newport Road, which is a four-lane carriageway as it passes through the centre. The centre is therefore difficult to traverse, though there are two signal-controlled crossing points, one at each end of the centre. Parade style parking is provided on the western side of the centre, with free parking available for approximately 25 vehicles. This parade is well-used and there is considerable potential for 'circling' during busy periods.

9.58 The composition of the centre is heavily service-based (71.7% of all units), with the provision of retail, leisure and financial and business services all exceeding UK averages. The centre has a below average convenience and comparison goods provision in terms of numbers, though does benefit from a small Sainsbury's Local unit which has its own dedicated car park. Vacancies are low, at just 8.7% of units.

9.59 The centre is heavily trafficked, and largely concrete in its appearance with little greenery. Environmental quality is therefore relatively low. Notwithstanding, this is clearly a popular centre which is reflected in relatively high footfall, low vacancies and little evidence of litter or graffiti.

9.60 The nearest bus stop is at the junction of Newport Road and Widecombe Drive. There are no OVO electric bikes stands in the centre.

Rhiwbina Village

Description

9.61 Rhiwbina Village is located to the north of the city, approximately 6 kilometres from the city centre.

Figure 9.61.1 **Photos of Rhiwbina Village**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 9.61.2 **Rhiwbina Village Composition Map**

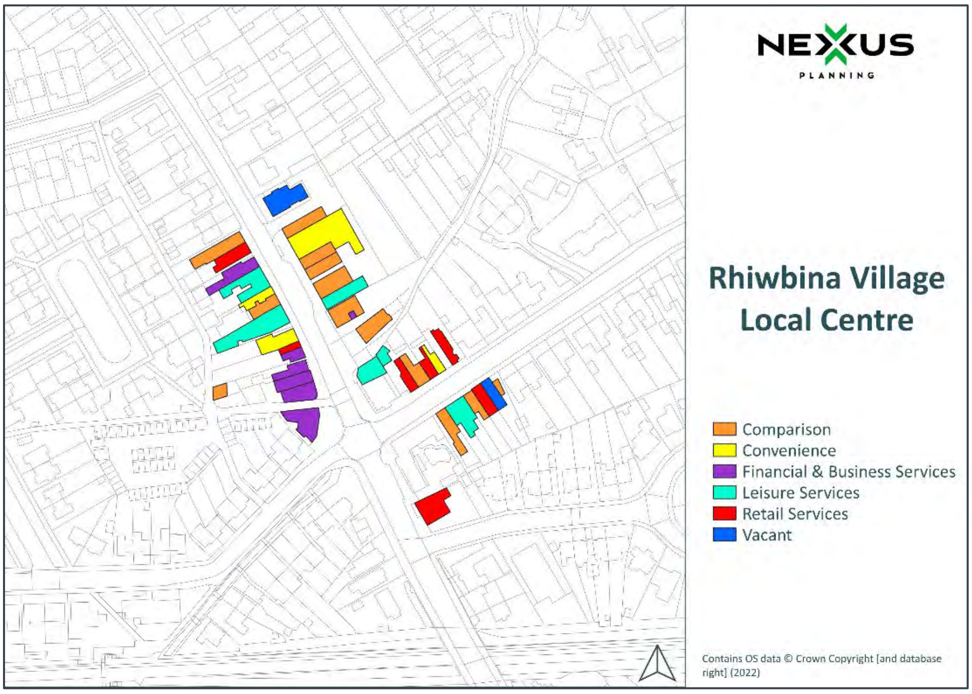
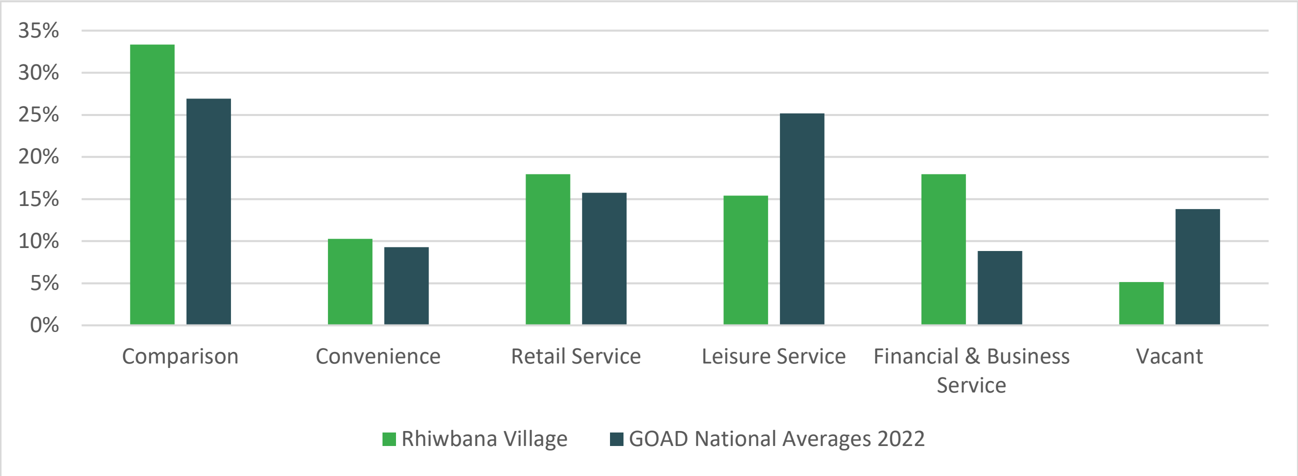


Figure 9.61.3 **Rhiwbina Village Composition Table**

Categories	Rhiwbina Village 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	13	33.3%	26.9%
Convenience	4	10.3%	9.3%
Services (Total)	20	51.3%	49.8%
Retail	*7*	*18.0%*	*15.8%*
Leisure	*6*	*15.4%*	*25.2%*
Financial & Business	*7*	*18.0%*	*8.8%*
Vacant	2	5.1%	13.8%
TOTAL	39	100.0%	100.0%

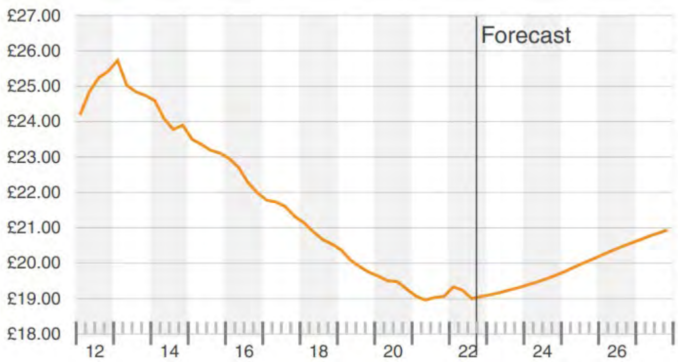
Figure 9.61.4 **Rhiwbina Village Composition Graph**



Rents

9.62 The CoStar Retail Report 2022 identifies the market rent per square foot to be £18.99.

Figure 9.62.1 **Market rent per SF for Rhiwbina Village**



Source: CoStar Retail Report 2022

Assessment

9.63 Rhiwbina Village is a popular centre centred around the cross-roads of Pen-Y-Dre, Pantbach Road, Beulah Road and Heol-Y-Deri. The centre has a high environmental quality, with considerable effort having gone into providing street planting and floral displays. Shop frontages are attractive and varied and there is no evidence of litter or graffiti.

9.64 The centre has an above average proportion of comparison goods, as well as financial and business services, both of which are unusual for a small local centre and point towards an affluent walk-in catchment. Vacancies are low at just 5.1% of units.

9.65 The centre benefits from an OVO electric bike stand on the corner of Pen-Y-Dre, and there are bus stops immediately outside the busiest footfall area on Heol-Y-Deri. The centre does not have any off-street parking, and relies on street spaces on Heol-Y-Deri and Beulah Road. Parking availability can be an issue at peak periods.

Salisbury Road

Description

9.66 Salisbury Road is a local centre, of linear nature and hosting 42 units. It benefits from a central location, as it is in close proximity to the city centre, and Cathays railway station.

Figure 9.66.1 **Photos of Salisbury Road**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 9.66.2 **Salisbury Road Composition Map**

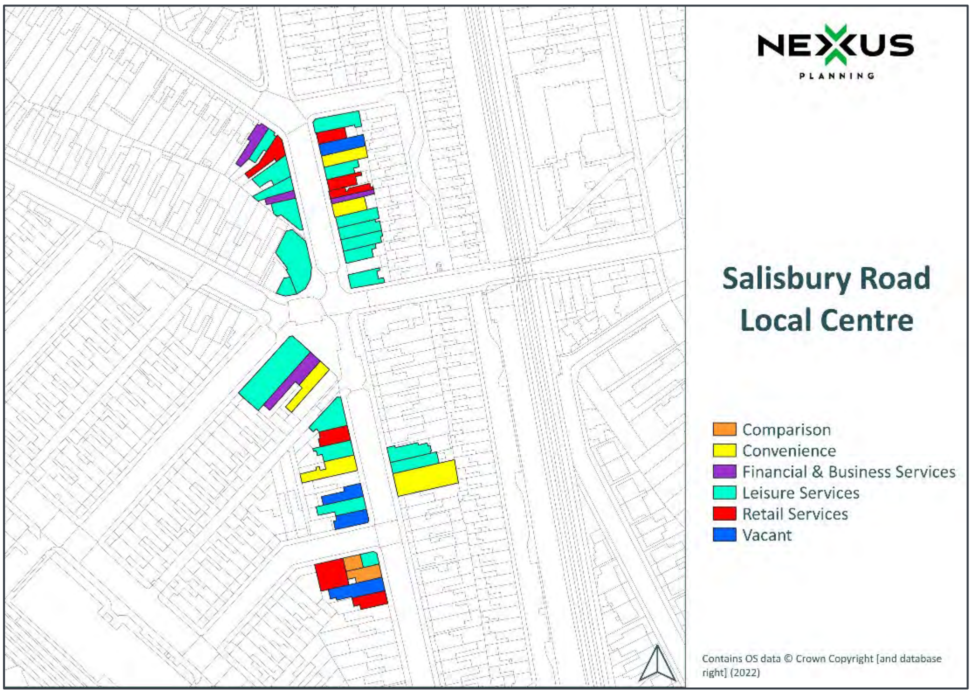
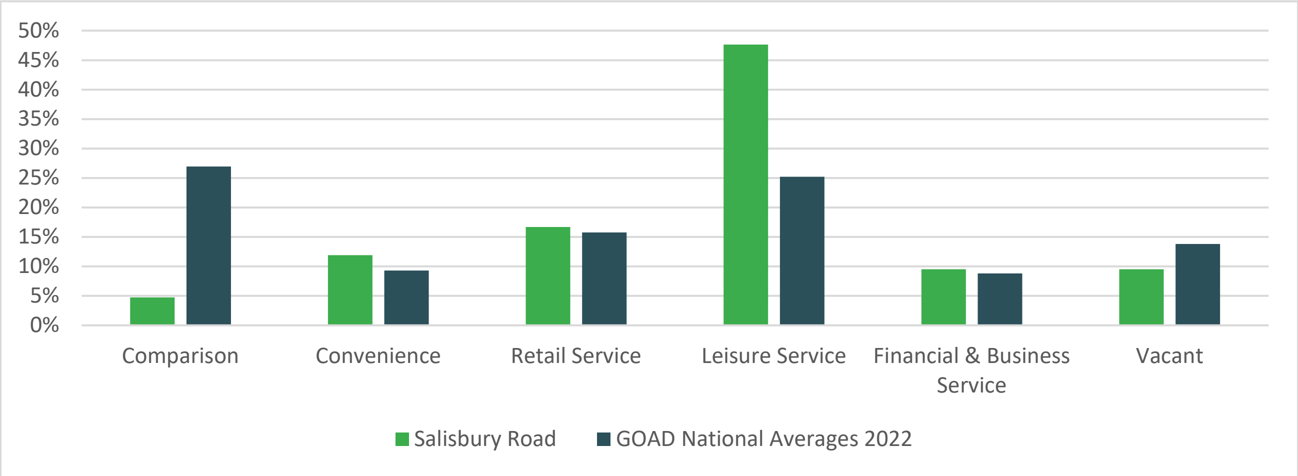


Figure 9.66.3 **Salisbury Road Composition Table**

Categories	Salisbury Road 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	2	4.8%	26.9%
Convenience	5	11.9%	9.3%
Services (Total)	31	73.8%	49.8%
Retail	*7*	*16.7%*	*15.8%*
Leisure	*20*	*47.6%*	*25.2%*
Financial & Business	*4*	*16.7%*	*8.8%*
Vacant	4	9.5%	13.8%
TOTAL	42	100.0%	100.0%

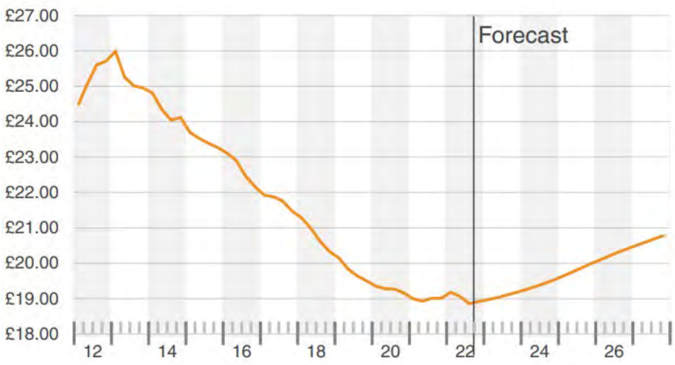
Figure 9.66.4 **Salisbury Road Composition Graph**



Rents

9.67 The CoStar Retail Report 2022 identifies the market rent per square foot to be £18.85.

Figure 9.67.1 **Market rent per SF for Salisbury Road**



Source: CoStar Retail Report 2022

Assessment

9.68 The centre has a clear convenience and services function. 11.9% (5 units) of total units are convenience, which is higher than the UK average (9.3%). This includes a Tesco store. Services make up 73.8% (31 units) of the total offer, which is significantly above to the UK average (49.8%).

9.69 The centre is linear, compact and easy to navigate. The overall appearance of the centre is average but could be improved, with some buildings looking tired and in need of upkeep/repair. The centre would also benefit from additional landscaping and greenery. Improved cleaning is needed with litter, graffiti and weeds on pavement present. The centre has a safe feel with no noticeable signs of day-time antisocial behaviour. No noticeable CCTV was present.

Splott Road

Description

9.70 Splott Road is a local centre located in the Splott neighbourhood, to the south-east of the city centre. It is linear in nature and hosts 33 units.

Figure 9.70.1 **Photos of Splott Road**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 9.70.2 **Splott Road Composition Map**

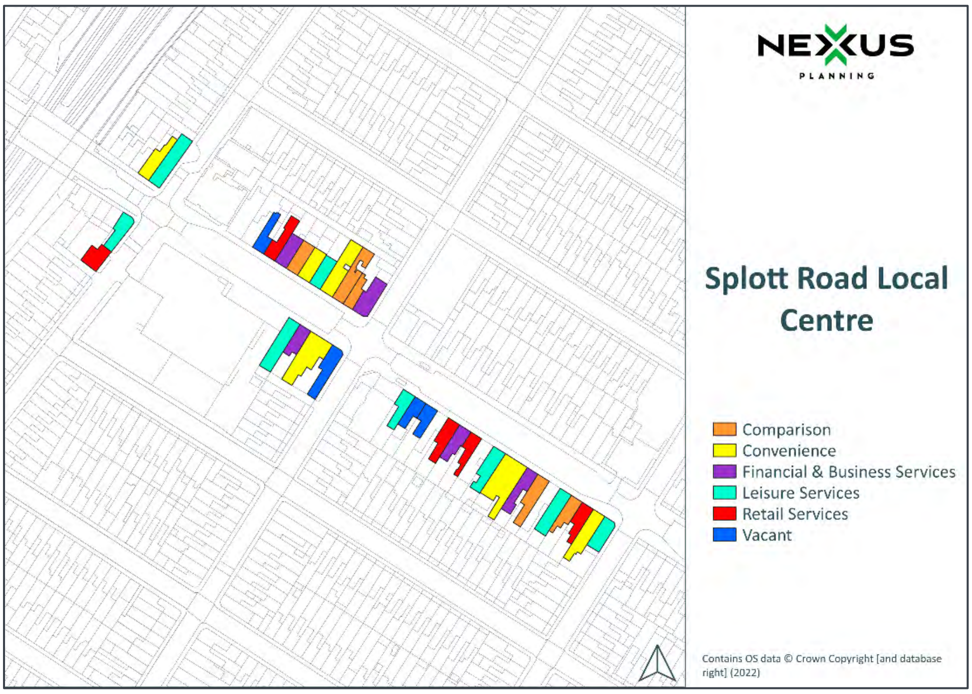
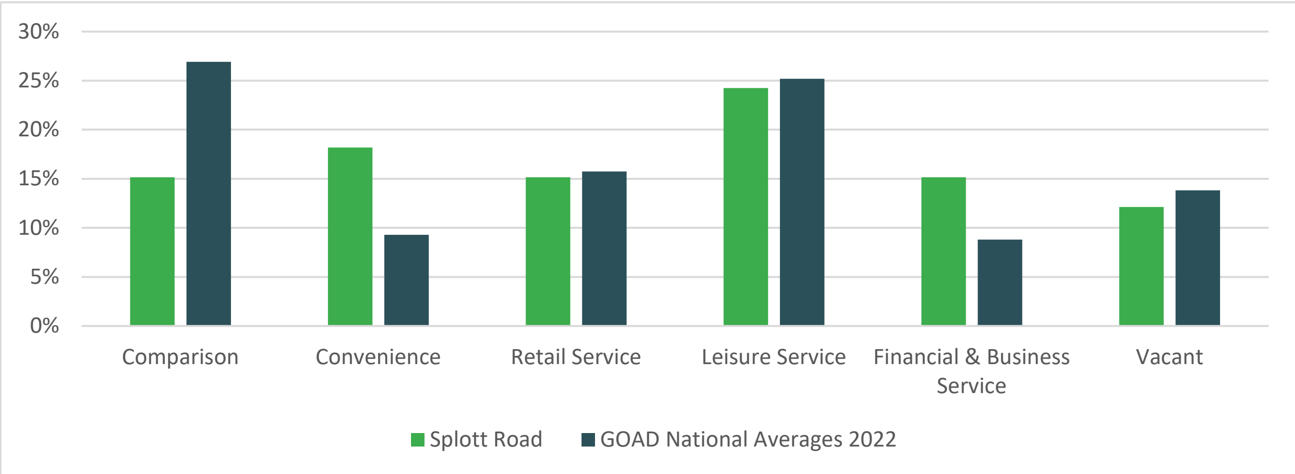


Figure 9.70.3 **Splott Road Composition Table**

Categories	Splott Road 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	5	15.2%	26.9%
Convenience	6	18.2%	9.3%
Services (Total)	18	54.6%	49.8%
Retail	5	15.2%	15.8%
Leisure	8	24.3%	25.2%
Financial & Business	5	15.2%	8.8%
Vacant	4	12.1%	13.8%
TOTAL	33	100.0%	100.0%

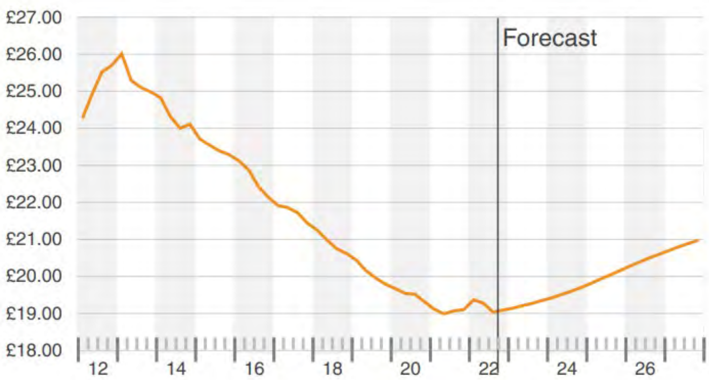
Figure 9.70.4 **Splott Road Composition Graph**



Rents

9.71 The CoStar Retail Report 2022 identifies the market rent per square foot to be £19.03.

Figure 9.71.1 **Market rent oer SF for Splott Road**



Source: CoStar Retail Report 2022

Assessment

9.72 The centre has a clear convenience function. 18.2% (6 units) of total units are convenience, which is much higher than the UK average (9.3%). This includes a Co-op, and a number of independent stores including a bakery.

9.73 The quality of environment can be improved. Some buildings are looking tired and in need for upkeep / repair. Improved cleaning is needed with litter, graffiti and weeds on pavement present. The centre has a reduced perception of safety. Homelessness and substance abuse is present, with some signs of antisocial behaviour. No noticeable CCTV was present. The centre is flat, linear and is easy to navigate.

Station Road, Llandaff North

Description

9.74 Station Road is located in the north-western suburb of Llandaff. It is situated approximately 4.5 kilometres outside the city centre.

Figure 9.74.1 **Photos of Station Road, Llandaff North**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 9.74.2 **Station Road, Llandaff North Composition Map**

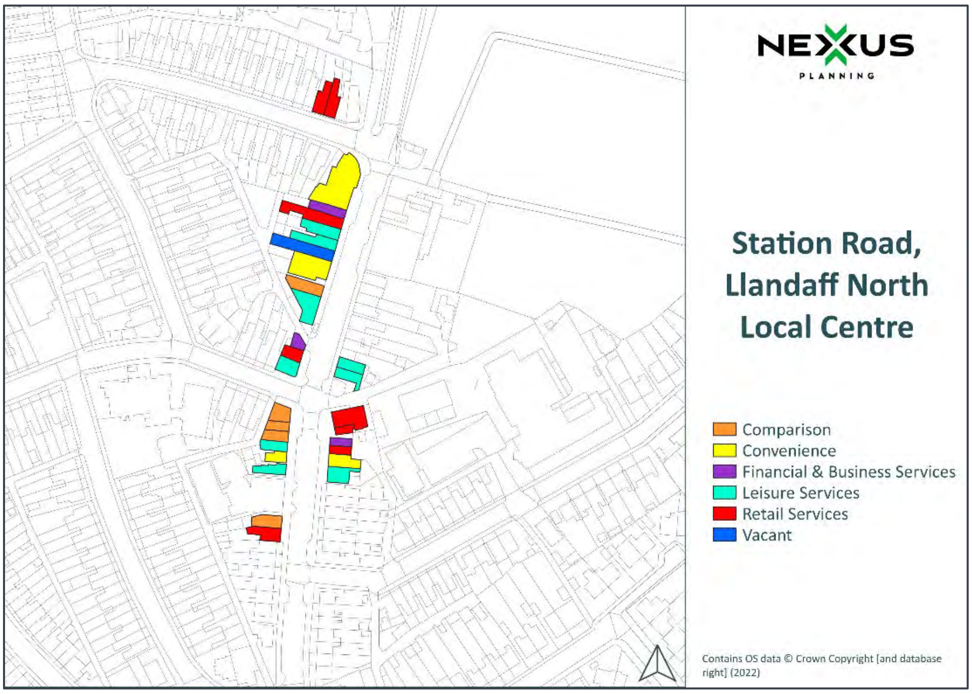
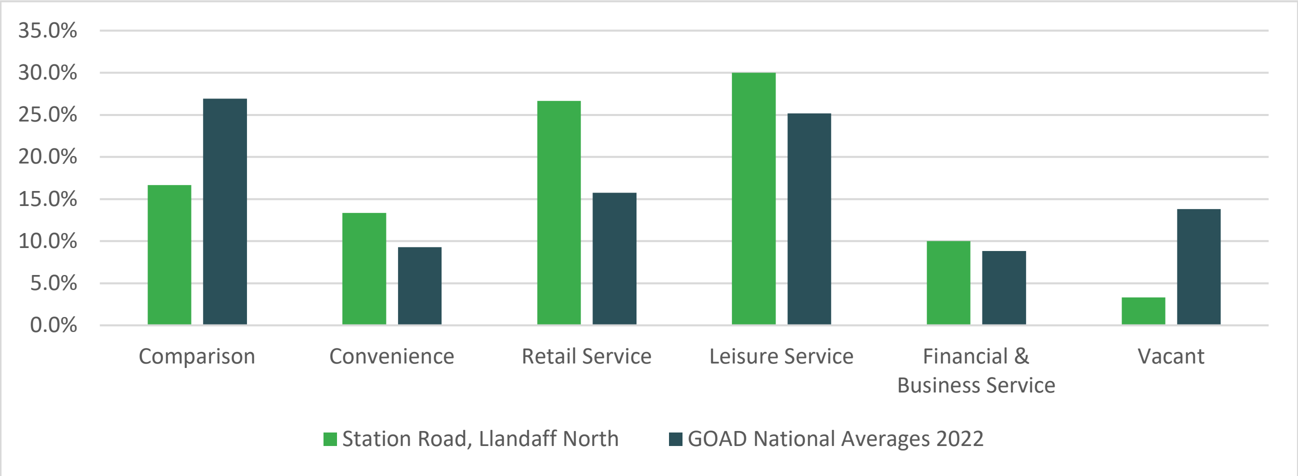


Figure 9.74.3 **Station Road, Llandaff North Composition Table**

Categories	Station Road, Llandaff North 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	5	16.7%	26.9%
Convenience	4	13.3%	9.3%
Services (Total)	20	66.7%	49.8%
Retail	8	26.7%	15.8%
Leisure	9	30.0%	25.2%
Financial & Business	3	10.0%	8.8%
Vacant	1	3.3%	13.8%
TOTAL	30	100.0%	100.0%

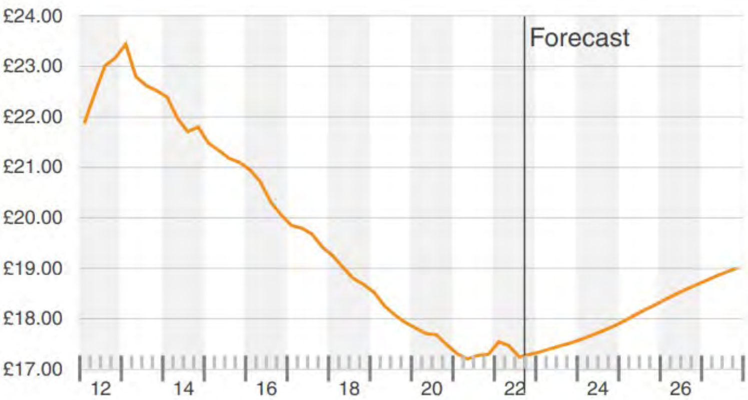
Figure 9.74.4 **Station Road, Llandaff North Composition Graph**



Rents

9.75 The CoStar Retail Report 2022 identifies the market rent per square foot to be £17.24.

Figure 9.75.1 **Market rent per SF for Station Road, Llandaff North**



Source: CoStar Retail Report 2022

Assessment

9.76 Llandaff North is the only local centre to benefit from its own railway station. This is likely in turn to dictate some of its characteristics, with a notably high volume of leisure service uses (predominantly takeaways), which will be partially aimed at the commuter trade. Footfall also notably peaks at the beginning and end of the weekday.

9.77 All parking is provided on-street in the centre and is generally readily available. A bus stop is located centrally to the centre on Station Road itself.

9.78 The centre has reasonable environmental quality, with wide pavements for the main part and no significant evidence of litter or graffiti. It does though lack any open spaces or planting and has a car-dominated feel. There is an edge-of-centre Lidl store approximately 200m south of the centre, and some evidence of walking between that store and the centre was observed, though most people are likely to drive.

Station Road, Llanishen

Description

9.79 Station Road is located in Llanishen which is a suburb to the north of the city and is approximately 6 kilometres from the city centre.

Figure 9.79.1 **Photos of Station Road, Llanishen**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 9.79.2 **Station Road, Llanishen Composition Map**

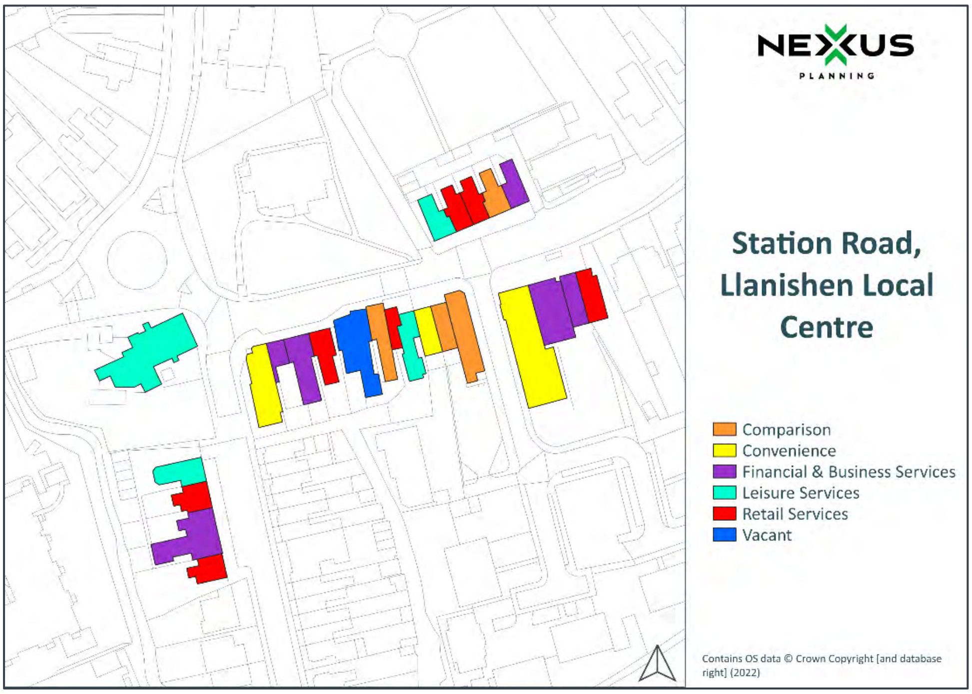
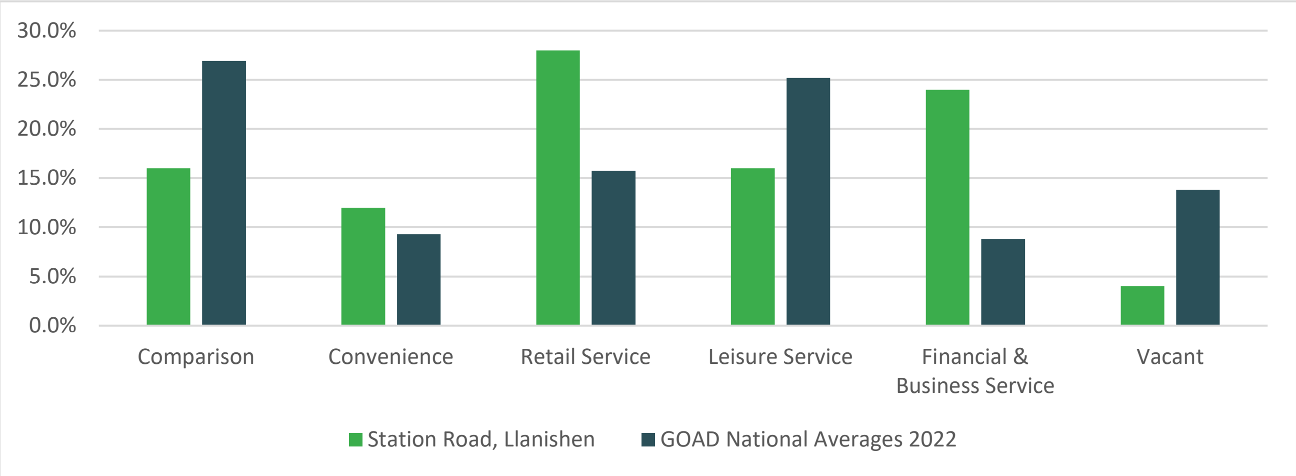


Figure 9.79.3 **Station Road, Llanishen Composition Table**

Categories	Station Road, Llanishen 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	4	16.0%	26.9%
Convenience	3	12.0%	9.3%
Services (Total)	17	68.0%	49.8%
Retail	*7*	*28.0%*	*15.8%*
Leisure	*4*	*16.0%*	*25.2%*
Financial & Business	*6*	*24.0%*	*8.8%*
Vacant	1	4.0%	13.8%
TOTAL	25	100.0%	100.0%

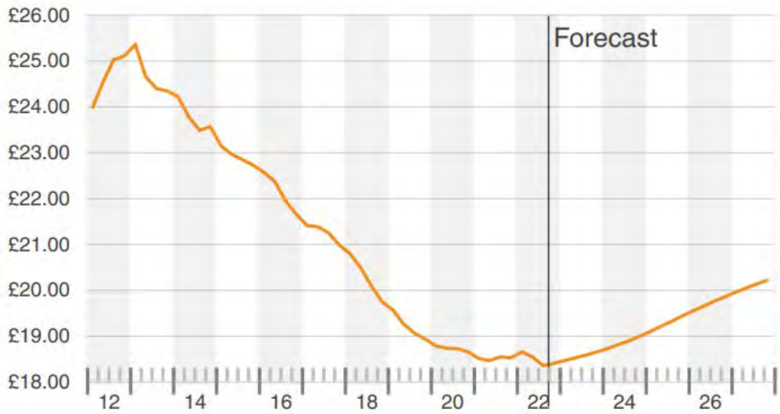
Figure 9.79.4 **Station Road, Llanishen Composition Graph**



Rents

9.80 The CoStar Retail Report 2022 identifies the market rent per square foot to be £18.35.

Figure 9.80.1 **Market rent per SF for Station Road, Llanishen**



Source: CoStar Retail Report 2022

Assessment

9.81 Station Road, Llanishen is a compact and attractive local centre. It benefits from a number of attractive properties on the south side of Station Road, as well as the open space and tall trees bounding St Isan's Church. Shop fronts are also varied and interesting and there are a number of street planters.

9.82 Despite its small size, the centre has relatively high footfall and a bustling feel. This is mainly concentrated around the rank of shops on the northern side of Station Road which benefit from dedicated parking. There was just one unit surveyed to be vacant resulting in a vacancy rate well below UK average. The centre also has a number of financial and business units well in excess of UK average. Unusually for a local centre of its size, the centre has three banks and/or buildings societies.

9.83 Parking is relatively easy, with a second rank of on-street parking spaces available on the quieter frontage of Kimberley Terrace. An OVO electric parking stand is provided on the norther side of Station Road. A bus stop is located on the south side of Station Road. Whilst Llanishen railway station is not located within the local centre boundary, it is a relatively easy walk up the hill to the east of the centre (approximately 350m).

Station Road, Radyr

Description

9.84 Station Road is located in the north-western suburb of Radyr, approximately 5 kilometres from the city centre.

Figure 9.84.1 **Photos of Station Road, Radyr**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 9.84.2 **Station Road, Radyr Composition Map**

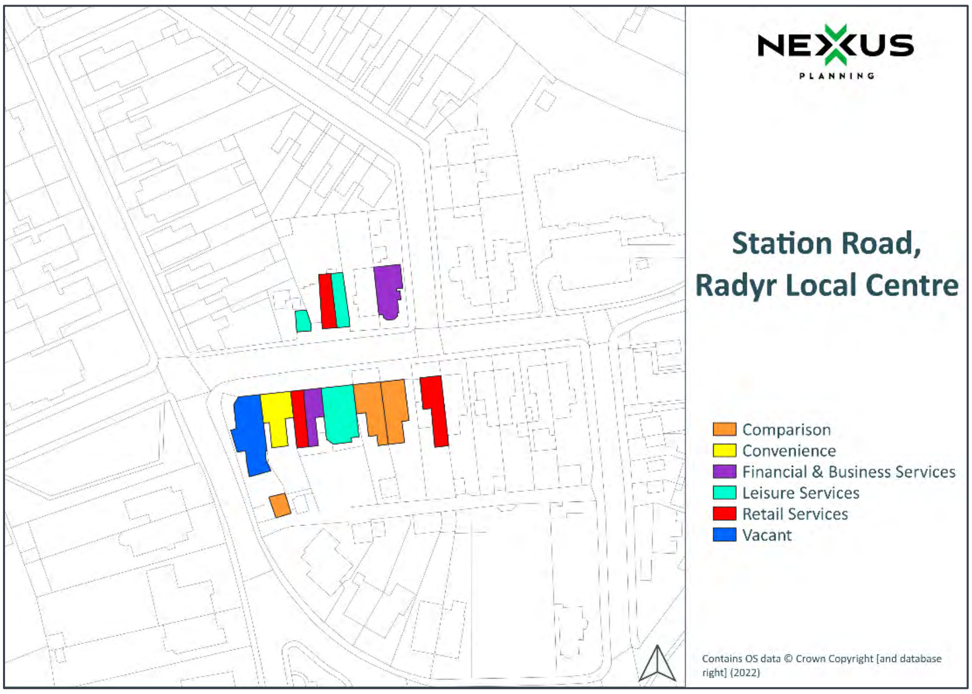
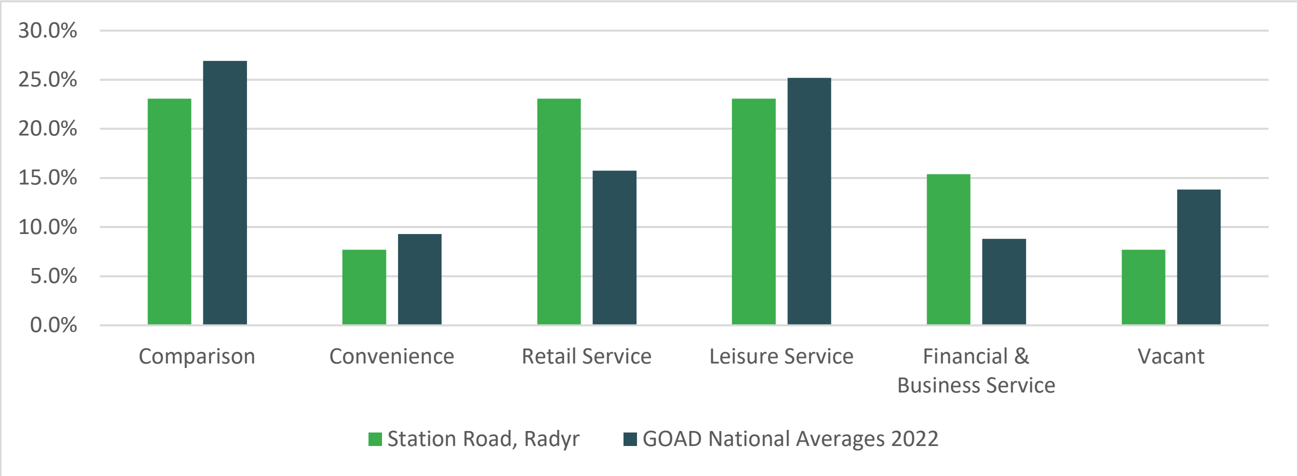


Figure 9.84.3 **Station Road, Radyr Composition Table**

Categories	Station Road, Llanishen 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	3	23.1%	26.9%
Convenience	1	7.7%	9.3%
Services (Total)	8	61.5%	49.8%
Retail	*3*	*23.1%*	*15.8%*
Leisure	*3*	*23.1%*	*25.2%*
Financial & Business	*2*	*15.4%*	*8.8%*
Vacant	1	7.7%	13.8%
TOTAL	13	100.0%	100.0%

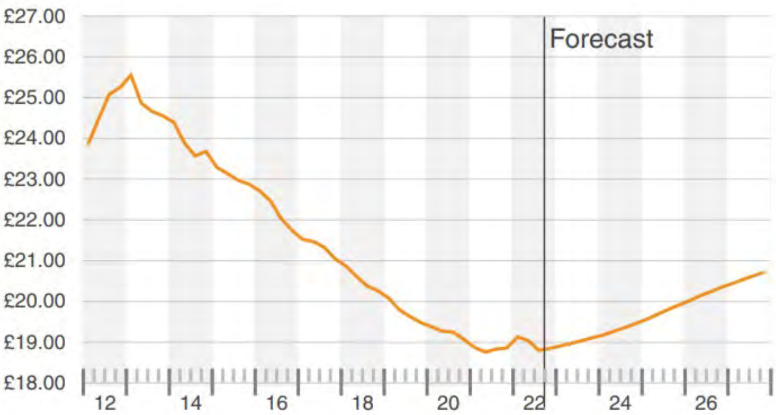
Figure 9.84.4 **Station Road, Radyr Composition Graph**



Rents

9.85 The CoStar Retail Report 2022 identifies the market rent per square foot to be £18.79.

Figure 9.85.1 **Market rent per SF for Station Road, Radyr**



Source: CoStar Retail Report 2022

Assessment

9.86 The local centre is small and compact, centred around a cluster of units on the south side of Station Road. The centre is attractive, with converted period properties that are likely to have sprung up in support of the nearby Radyr railway station, located an approximate 300m walk to the north-east of the centre.

9.87 The centre has good environmental quality with a wide pavement on the south side of the street and varied and interesting shopfronts adding to its appeal. The centre is underpinned by Co-op and McColl's stores, alongside cafés and other units associated with its service function. There was just one vacant unit at the time of the survey.

9.88 Parking is provided on-street and is generally easy to find outside of peak commute hours. An OVO electric bike stand is located on Station Road and the nearest bus stops are around a 50m walk north of the centre on Heol Isaf.

Tudor Street

Description

9.89 Tudor Street is a local centre located to the west of Cardiff city centre, and in close proximity to the Principality Stadium and Cardiff Central train station.

Figure 9.89.1 **Photos of Tudor Street**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 9.89.2 **Tudor Street Composition Map**

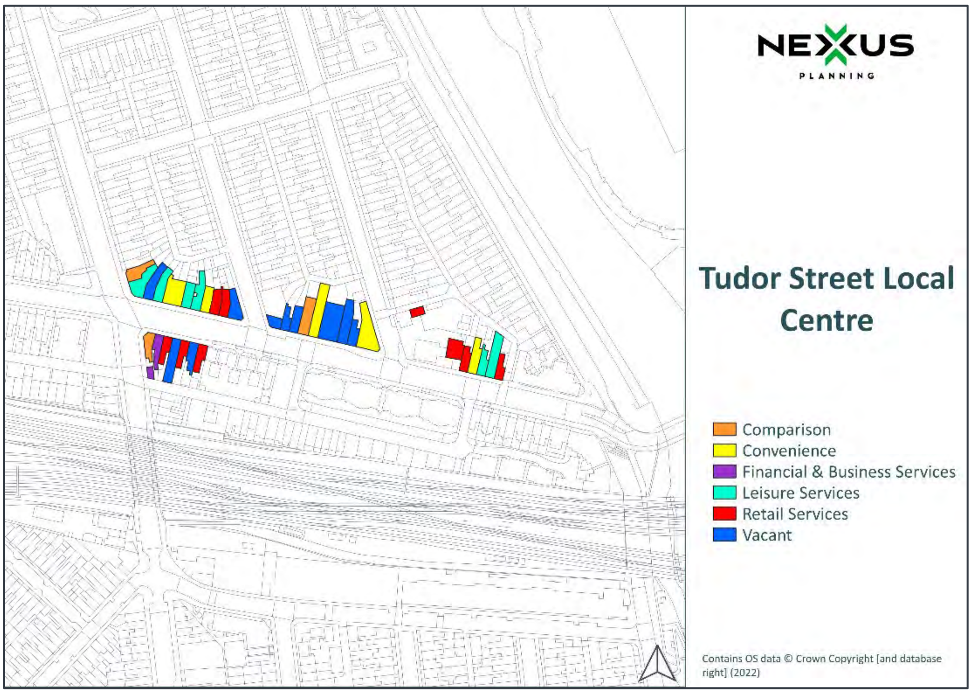
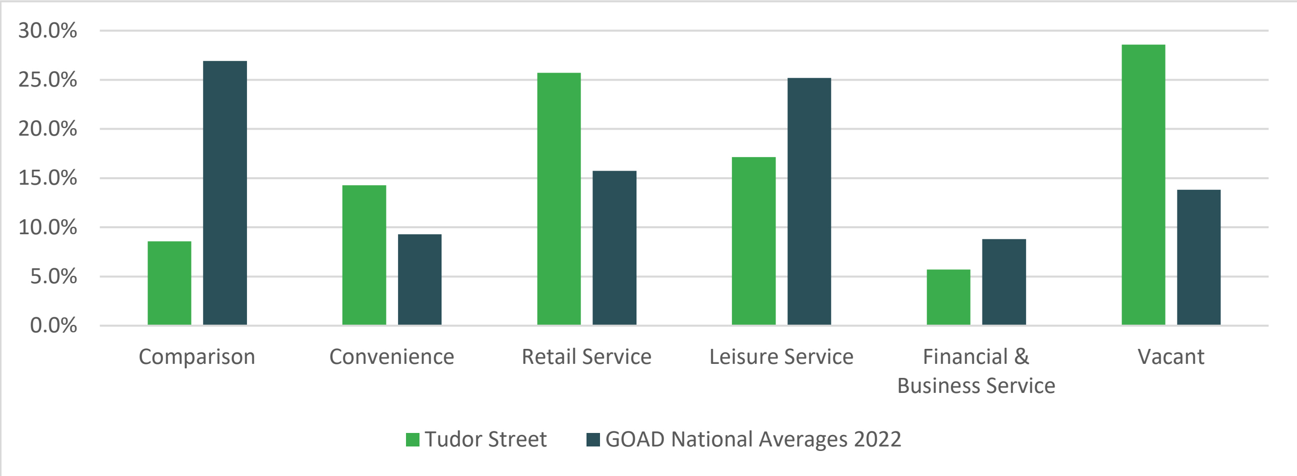


Figure 9.89.3 **Tudor Street Composition Table**

Categories	Tudor Street 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	3	8.6%	26.9%
Convenience	5	14.3%	9.3%
Services (Total)	17	48.6%	49.8%
Retail	*9*	*25.7%*	*15.8%*
Leisure	*6*	*17.1%*	*25.2%*
Financial & Business	*2*	*5.7%*	*8.8%*
Vacant	10	28.6%	13.8%
TOTAL	35	100.0%	100.0%

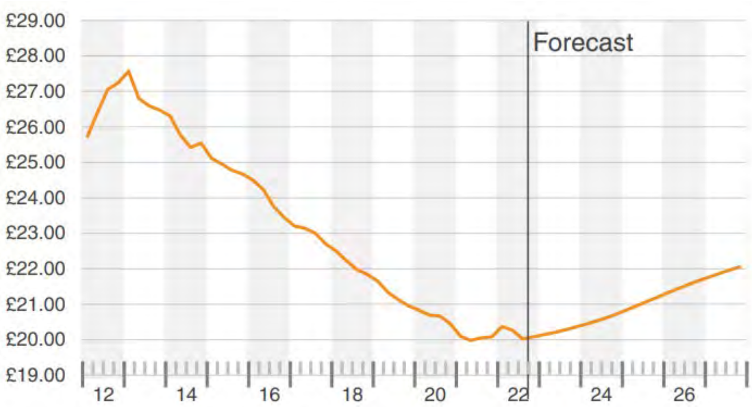
Figure 9.89.4 **Tudor Street Composition Graph**



Rents

9.90 The CoStar Retail Report 2022 identifies the market rent per square foot to be £20.02.

Figure 9.90.1 **Market rent per SF for Tudor Street**



Source: CoStar Retail Report 2022

Assessment

9.91 The comparison offer is small and limited to clothes shops. The convenience offer is larger but includes only small convenience stores and lacks an anchor. Vacancy rates in the centre are high, more than double the UK average.

9.92 Tudor Street is currently undergoing a £5 million commercial improvement scheme, and these investments in the public realm are obvious. Pavements have been newly paved, and some greenery planted. Shopfronts have also been newly painted and look well maintained. Although there are several vacant units, these have been well concealed and look consistent with other shop units.

9.93 Pedestrian movement in the centre is aided by wide pavements and designated pedestrian crossings. Parking is currently an issue in the centre, though we understand that on-street parking is due to be added as part of the redevelopment scheme. Bus stops in the centre offer services on many routes. OVO bike stations are located to the south and east of the centre. New two-way segregated cycle lanes are also due to be added to the centre.

Willowbrook Drive

Description

9.94 Willowbrook Drive is a small local centre located approximately 7 kilometres east of the city centre, on the eastern extremity of the city.

Figure 9.94.1 **Photos of Willowbrook Drive**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 9.94.2 **Willowbrook Drive Composition Map**

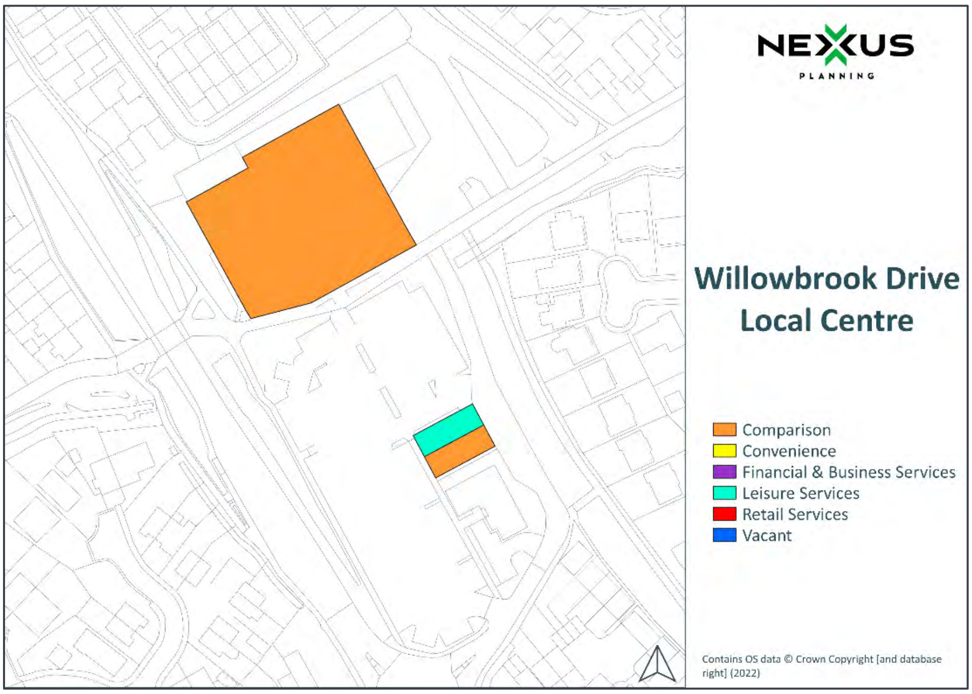
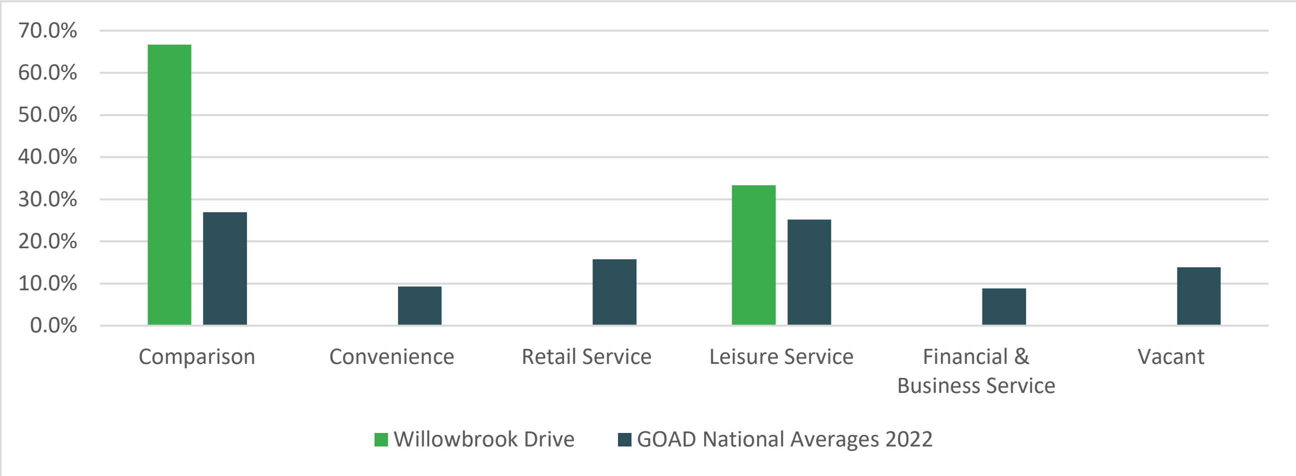


Figure 9.94.3 **Willowbrook Drive Composition Table**

Categories	Willowbrook Drive 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	2	66.7%	26.9%
Convenience	0	0.0%	9.3%
Services (Total)	1	33.3%	49.8%
Retail	0	0.0%	15.8%
Leisure	1	33.3%	25.2%
Financial & Business	0	0.0%	8.8%
Vacant	0	0.0%	13.8%
TOTAL	3	100.0%	100.0%

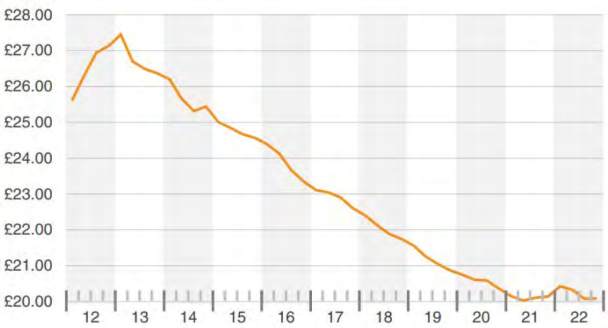
Figure 9.94.4 **Willowbrook Drive Composition Graph**



Rents

9.95 The CoStar Retail Report 2022 identifies the market rent per square foot to be £20.07.

Figure 9.95.1 **Market rent per SF for Willowbrook Drive**



Source: CoStar Retail Report 2022

Assessment

9.96 Willowbrook Drive is a local centre comprised of three large units. A large ‘What!’ store underpins the centre, alongside a Boots pharmacy and a take-away restaurant. A doctors surgery is also present.

9.97 The centre has a large surface level car park accessed off Strathy Road. Environmental quality is relatively poor, with the car park dominating the appearance and considerable evidence of litter and overgrown planting present.

9.98 Bus stops are located across the road on Willowbrook Drive. Some cycle parking was available outside the main unit.

Wilson Road

Description

9.99 Wilson Road is a small local centre consisting of a row of shop units. It is located in Ely, a residential area in the west of Cardiff.

Figure 9.99.1 **Photos of Wilson Road**

Source: Nexus Site Visit (September 2022)

GOAD Composition and Vacancies

Figure 9.99.2 **Wilson Road Composition Map**

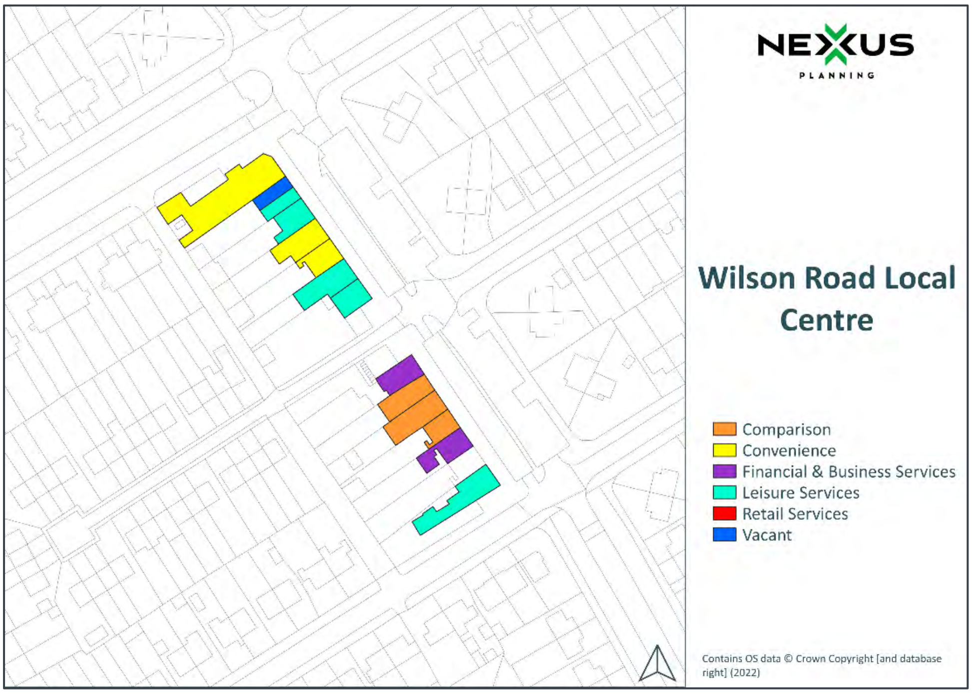
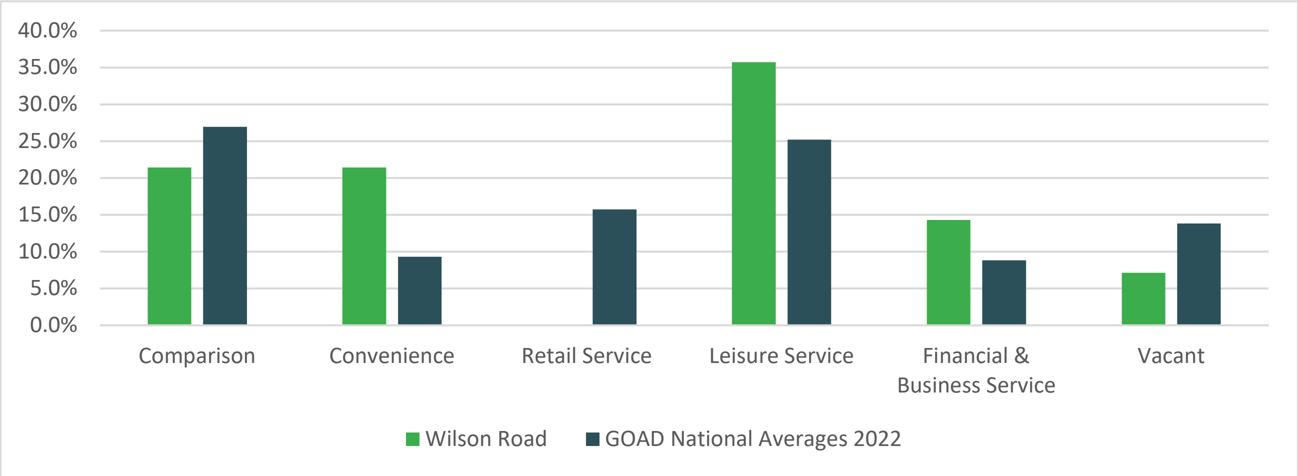


Figure 9.99.3 **Wilson Road Composition Table**

Categories	Wilson Road 2022		UK Average 2022
	(#)	(%)	(%)
Comparison	3	21.4%	26.9%
Convenience	3	21.4%	9.3%
Services (Total)	7	50.0%	49.8%
Retail	0	0.0%	15.8%
Leisure	5	35.7%	25.2%
Financial & Business	2	14.3%	8.8%
Vacant	1	7.1%	13.8%
TOTAL	14	100.0%	100.0%

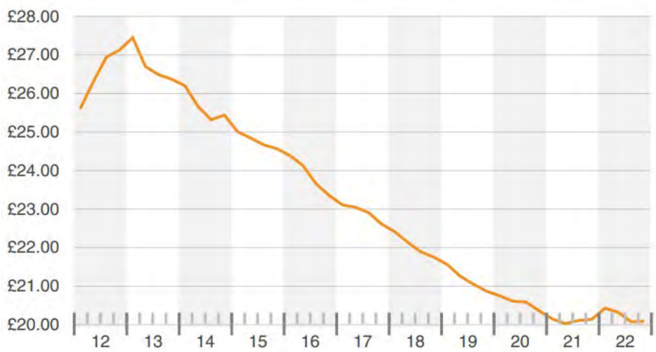
Figure 9.99.4 **Wilson Road Composition Graph**



Rents

9.100 The CoStar Retail Report 2022 identifies the market rent per square foot to be £20.07.

Figure 9.100.1 **Market rent per SF for Wilson Road**



Source: CoStar Retail Report 2022

Assessment

9.101 The centre's offer is likely to cater to everyday local needs, as it includes convenience stores, a pharmacy and a butchers. Its leisure offer is larger than the UK average, but these units are all takeaways or fast-food outlets.

9.102 The centre's environmental quality is relatively low due to shopfronts that look outdated or poorly maintained. It is quite grey as no greenery has been provided. Cleanliness is also an issue, though some bins have been provided.

9.103 Wide pavements aid the movement of pedestrians, though the centre is on a slight incline. Ample free parking spaces are available on-street. Bus stops are located at the north of the centre; these provide regular services to the city centre. Some cycle lanes are provided, but otherwise there is a lack of cycling infrastructure.

10. Policy & Proposals

Introduction

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

a. The hierarchy of centres;

b. The spatial extent of centres; and

c. Recommended planning policy approach.

10.2 We address each of these tasks in turn below.

The Retail Hierarchy

10.3 In Sections 7-9, we set out a detailed health-check of Cardiff City Centre, the 11 District Centres, and the 20 Local Centres, which comprise the current retail hierarchy in Cardiff as defined by Policies R1, R4 and R5 of the Adopted Plan and its associated Proposals Map. Our work has involved analysing the health of each of these centres under a series of checks specified in Section 13 of TAN4, as well as understanding market shares and qualitative likes and dislikes deriving from a widespread household telephone survey. Alongside this work, we have examined, in Section 5, a series of quantitative assessments to understand what, if any, gaps there are in local retail and leisure provision. The culmination of this work allows us to recommend an appropriate hierarchy of centres for the Council area, taking account both of present circumstances, and the Council's wider plan-making aims and objectives.

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

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

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

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

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

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

10.8 Turning specifically to the position in the Cardiff Council area, the adopted Plan (2016) has a specified retail hierarchy set out at Policy R1. That policy describes the hierarchy as comprising the Central Shopping Area, District Centres and Local Centres. Policies R4 and R5 then set out which centres are District Centres and Local Centres. When amalgamated, the full hierarchy is as follows:

Figure 10.8.1 **Exisitng Retail Hierarchy**

Hierarchy	Centre/s
Central Shopping Area	Cardiff City Centre
District Centres	Albany Road/Wellfield Road City Road Clifton Street Cowbridge Road East Crwys Road/Woodville Road Bute Street/James Street Merthyr Road, Whitchurch Penarth Road/Clare Road St Mellons Thornhill Whitchurch Road
Local Centres	Birchgrove Bute Street (Loudoun Square) Cathedral Road Countisbury Avenue Caerau Lane Fairwater Green Gabalfa Avenue Grand Avenue

	High Street, Llandaff Maelfa, Llanedeyrn Newport Road, Rumney Rhiwbina Village Salisbury Road Splott Road Station Road, Llanishen Station Road, Llandaff North Station Road, Radyr Tudor Street Willowbrook Drive Wilson Road

10.9 Having established the position in the adopted Plan, it is first relevant to consider whether the groupings used remain appropriate i.e. Central Shopping Area, District Centres and Local Centres. Planning Policy Wales nor TAN4 specifies the titles of a suggested retail hierarchy. Indeed, the terms 'Central Shopping Area', 'District Centre' and 'Local Centre' are not found in either document. It is therefore for each Council in Wales to suggest its own hierarchy titles with corresponding definitions. In light of this, and also the findings of our study in general, we are content that the titles used by Cardiff Council remain broadly appropriate. Being an urban authority area, there are no centres which would be described as 'town centres', 'village centres' or 'rural centres', as in other local authority areas, and we agree that each centre outside of Cardiff City centre is appropriately described as either a District Centre or Local Centre.

10.10 However, we do consider that it might be appropriate to retitle the 'Central Shopping Area' to the 'Central Retail and Commercial Area'. This reflects the terminology set out at Paragraph 4.3.37 of PPW and is also reflective in our view of the need to define the centre more broadly and flexibly than as being purely for 'shopping' activities. Linked to this, and as set out further below in our commentary on boundaries, we advocate small extensions to the current boundary in recognition of the diverse range of uses found within Cardiff City Centre.

10.11 Beyond titles, it is also important to define the role and purpose of centres at each tier of the hierarchy. This is specified at Paragraph 4.3.1 of PPW. The adopted Plan does not currently do this, and we would recommend to the Council that a suitable definition is added to each of the three tiers of the hierarchy to assist with expectations around the future role and function of each centre, and how this differs between different tiers. Having assessed each centre within the current hierarchy, we suggest wording such as the following to describe the role of each tier of the hierarchy. We discuss this further under 'Development Management Policies' below.

Figure 10.11.1 **Potential Definitons for the Role of each Tier of the Retail Hierarchy**

Hierarchy	Role
Central Shopping Area (or 'Central Retail and Commercial Area')	Provides a broad range of shops, retail and non-retail services, businesses, cultural, leisure and community facilities to serve the City and a significant hinterland beyond. It is both the focus for the community and public transport networks.
District Centres	Provides (or has the potential to provide) a range of shops, retail and non-retail services, businesses and community facilities to a suburb and potentially neighbouring suburbs.

Local Centres	Provides (or has the potential to provide) a small grouping of units, typically comprising a small convenience store, other small shops of a local nature, and some retail or non-retail services. Will typically serve its immediate suburb.

10.12 Having considered the title, role and function of the retail hierarchy, we move on next to consider whether the centres of the current retail hierarchy (as set out at Figure 38.9.1) are appropriately placed. In keeping with guidance elsewhere in the UK, there is no set methodology for defining a retail hierarchy in PPW or TAN 4. We have therefore utilised our empirical evidence to assess a range of criteria that, we feel, provides a suitable basis for supporting the proposed hierarchy. Figure 39.11.1 provides an assessment of each of the thirty-two centres which have been subject to consideration under this Study. Descriptors that have been chosen include the number of units, comparison and convenience goods market share (from our survey work), average market rent, and supermarket and community services provision. This list is not intended to be exhaustive, but we consider these to be some of the key characteristics which define the hierarchy we have sought to define in Figure 39.10.1.

Figure 10.12.1 **Retail Hierarchy Indicators**

Centre	No of Units	Market Share – Comparison Goods (Inner Study Area)	Market Share – Convenience Goods (Inner Study Area)	Market Rent	Community Services[29]	Large Super-markets[30]
Central Shopping Area	654	45.4%	4.8%	£23.02/ sq ft	LIB, LC, DS, PS, TS	1
Albany Road/ Wellfield Road	194	0.8%	1.8%	£18.83/ sq ft	LIB, DS, TS	
City Road	160	0.0%	0.5%	£18.66/ sq ft	LIB, DS, PS	
Clifton Street	95	0.0%	0.5%	£17.91/sq ft	DS	
Cowbridge Road East	176	0.4%	1.0%	£18.30/sq ft	LIB, DS	
Crwys Road/ Woodville Road	128	0.0%	0.0%	£18.30/ sq ft	LIB, LC, DS, TS	
Bute Street/ James Street	59	0.0%	0.3%	£17.39/sq ft	LIB, DS, PS, TS	
Merthyr Road, Whitchurch	89	0.0%	0.5%	£18.68/sq ft	LIB, DS	

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

[30] Defined as supermarkets with 1,000 sq m + net sales area

Penarth Road/ Clare Road	67	0.0%	1.2%	£19.90/sq ft	LIB, DS, TS	
St Mellons	15	0.6%	1.1%	£16.57/ sq ft	LIB, DS	1
Thornhill	3	0.9%	4 4.4%	£16.41/sq ft	DS	1
Whitchurch Road	109	0.8%	0.8%	£18.71/sq ft	LIB, LC, DS	
Birchgrove	43	0.0%	0.4%	£17.88/sq ft	DS	
Bute Street (Loundon Square)	9	0.0%	0.0%	£17.88/sq ft	LIB, DS	
Cathedral Road	26	0.2%	0.3%	£20.31/sq ft	DS	
Countisbury Avenue	33	0.1%	0.1%	£16.41/sq ft	LIB	
Caerau Lane	9	0.0%	0.0%	£17.42/sq ft	LC, DS	
Fairwater Green	13	0.0%	0.1%	£20.07/sq ft	LIB, LC, PS, DS	
Gabalfa Avenue	12	0.0%	0.0%	£19.31/sq ft	LIB, DS	
Grand Avenue	15	0.0%	0.0%	£25.77/sq ft	LIB	
High Street, Llandaff	32	0.0%	0.0%	£20.06/sq ft	DS	
Maelfa, Lalnderyn	12	0.0%	0.0%	N/A	LIB, DS	
Newport Road, Rumney	46	0.1%	0.1%	£19.35/sq ft	LC, PS	
Rhiwbina Village	39	0.1%	0.2%	£18.99/sq ft	LIB, TS	
Salisbury Road	42	0.0%	0.0%	£18.85/sq ft	DS	

Splott Road	33	0.1%	1.3%	£19.03/sq ft	DS	
Station Road, Llanishen	25	0.2%	0.1%	£18.35/sq ft	LIB, LC, TS, DS	
Station Rd, Llandaff North	30	0.0%	0.3%	£17.24/sq ft	TS, DS	
Station Road, Radyr	13	0.1%	0.4%	£18.79/sq ft	TS, DS	
Tudor Street	35	0.0%	0.0%	£20.02/sq ft		
Willowbrook Drive	3	0.0%	0.0%	£20.07/sq ft	DS	
Wilson Road	14	0.0%	0.0%	£20.07/sq ft	DS	

10.13 For the most part, our assessment shows a clear distinction between the three tiers of the hierarchy. It is broadly divided into a centre with 500+ units, centres with 50-200 units, and centres with up to 50 units. There are outliers to this simplistic assessment, most notably the District Centres at St Mellons (15 units) and Thornhill (3 units). However, each of those centres has a large supermarket which contribute significantly to their overall attraction and market share. The market share assessment also broadly supports the current hierarchy, with the majority of District Centres having convenience and comparison goods market shares in excess of the Local Centres. The same is true of the provision of community facilities.

10.14 In terms of any potential amendments to the hierarchy, there are no obvious 'outliers' in Figure 10.12 which would warrant a move away from the current hierarchy. We therefore recommend that the Council proceeds with the centres of the Retail Hierarchy as they are currently ordered.

10.15 Based on these indicators, we therefore suggest that the hierarchy set out at Figure 10.15 might be appropriate.

Figure 10.15.1 **Recommended Classification of Centres**

Hierarchy	Role	Centres
Central Shopping Area (or 'Central Retail and Commercial Area')	Provides a broad range of shops, retail and non-retail services, businesses, cultural, leisure and community facilities to serve the City and a significant hinterland beyond. It is both the focus for the community and public transport networks.	Central Shopping Area
District Centres	Provides (or has the potential to provide) a range of shops, retail and non-retail services, businesses and	Albany Road/ Wellfield Road City Road Clifton Street

	community facilities to a suburb and potentially neighbouring suburbs.	Cowbridge Road East Crwys Road/ Woodville Road Bute Street/ James Street Merthyr Road, Whitchurch Penarth Road/ Clare Road St Mellons Thornhill Whitchurch Road
Local Centres	Provides (or has the potential to provide) a small grouping of units, typically comprising a small convenience store, other small shops of a local nature, and some retail or non-retail services. Will typically serve its immediate suburb.	Birchgrove Bute Street (Loundon Square) Cathedral Road Countisbury Avenue Caerau Lane Fairwater Green Gabalfa Avenue Grand Avenue High Street, Llandaff Maelfa, Lalnderyn Newport Road, Rumney Rhiwbina Village Salisbury Road Splott Road Station Road, Llanishen Station Rd, Llandaff North Station Road, Radyr Tudor Street Willowbrook Drive Wilson Road

Source: Nexus Planning

10.16 We have also analysed our empirical household survey work to see if there are any notable market shares derived by other centres beyond the thirty-two centres currently contained within the hierarchy, with a view that they might be classified in the retail hierarchy as either 'District Centres' or 'Local Centres'. Based on the household survey findings at **Appendix B**, we do not consider that there are any other obvious candidates for inclusion. In a rural area, it is typical to find smaller villages or enclaves which offer important provision to local residents, and which overtime, may reach a gravity f provision which would warrant inclusion within the retail hierarchy. It is though different in a tight-knit urban conurbation such as Cardiff where the vast majority of provision outside of existing identified centres, is out-of-centre provision which by definition is potentially harmful to the vitality and viability of existing centres. Moreover, we have not identified any significant gaps in retail provision, exemplified by strong evidence of expenditure 'leakage' elsewhere, which might warrant a geographic intervention. For these reasons, we do not advocate any such centres being brought into the hierarchy.

The Spatial Extent of Centres

10.17 In this Study, we identify in Section 5 that there is negative projected capacity for future floorspace. There is therefore no obvious pressure to expand boundaries to cater for new development.

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

10.19 Edge-of-centre is defined as sites which are within a 200m or 300m walking distance of a centre boundary (TAN 4, Paragraph 7.4), whilst out-of-centre is defined as those areas beyond 300m. Defining suitable boundaries is therefore important in this context.

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

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

10.22 PPW also discusses the importance of identifying Primary and Secondary Shopping Areas within the boundaries of major centres (Paragraphs 4.3.30 to 4.3.39). Primary areas are typically characterised by a high proportion of A1 retail use, and secondary areas typically contain mixed uses such as shops, café and restaurants and other service and community uses. Local Authorities should encourage a diversity of uses within centres and link policies to these designations. In Cardiff, only the Central Shopping Area (as currently defined) has a 'Protected Shopping Frontage' designation which covers both the primary and secondary frontages. We consider that this remains appropriate as our health-check assessment has shown that Cardiff City Centre remains a vital and viable location for 'Protected Shopping Frontage,' whilst no other centre within the retail hierarchy has a volume of retail which would necessitate the inclusion of primary or secondary shopping frontages.

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

10.24 We have then looked at amending or delineating centre boundaries for the Central Retail and Commercial Area (as we have suggested re-titling it), District Centres and Local Centres. In the majority of cases, we found the adopted boundaries to be appropriate and do not propose any changes. However, for the reasons we set out, we do propose boundary changes in the following centres:

- Central Shopping Area: there are currently two defined boundaries – the 'Central Shopping Area' (CSA), which is governed by Policy R2, and 'Protected Shopping Frontages' which are governed by Policy R3. Our review of the two policies (see below) suggest that it would be beneficial to delineate a slightly wider boundary in order to allow greater flexibility and protect some of the key town centre uses (primarily commercial and leisure uses) on the periphery of the current CSA. As such the following changes are proposed:

    - Replacement of the CSA with a new, slightly wider, 'Central Retail and Commercial Area' boundary (CRCA). The delineation of the CRCA has been based on the SCA, but expanded to include existing units that carry town centre uses that relate well to the uses in the SCA, as restricted by natural boundaries such as major roads. We propose that all main town centre uses (namely retail and commercial uses) are directed toward the CRCA; and any uses with that boundary would be seen as 'in-centre'.

    - Protected Shopping Frontages – no changes are proposed as the key shopping frontages are covered by this delineation.

- Albany Road/Wellfield Road District Centre: The boundary has been extended in areas to the east of the centre to include a small number of additional units which have established town centre uses.

- Bute Street/James Street District Centre: The adopted boundary currently bisects the Mermaid Quay Shopping Centre, thus excluding any units to the east and south of the centre. However, the majority of these units are for town centre uses and we have therefore redrawn the boundary to include those units.

- Cowbridge Road East District Centre: The adopted boundary stretches from east to west along Cowbridge Road East. However, this excludes a small number of established units located on the side streets of Llandaff Road, Severn Road, Wyndham Crescent and King's Road. The boundary is recommended to be extended slightly to include these.

- Crwys Road/Woodville Road District Centre: The boundary has been extended slightly to the south to include an estate agent which is currently excluded from the adopted boundary.

- St Mellons District Centre: The boundary currently extends to a community centre building in the south of the centre. However, this area has extant planning permission for a residential development (19/03320/MJR) and we have therefore suggested excluding this area from the centre boundary.

- Fairwater Green Local Centre: The adopted boundary cuts through a unit used for leisure services, so the boundary has been amended slightly to include the whole unit.

- Grand Avenue Local Centre: The boundary has been drawn in at the south to exclude buildings which are not in town centre use.

- Maelfa Llanderyn Local Centre: The adopted boundary includes a site to the north-west which has extant planning permission and is being redeveloped for residential development (19/03219/MJR). Other areas to the north and west of the centre have been redeveloped into residential developments as part of the Maelfa Regeneration Scheme. As such, we have redrawn the boundary to exclude these areas.

- Splott Road/Carlisle Street Local Centre: Boundary amended to exclude residential units to the north-west of the centre.

- Station Road, Llandaff North Local Centre: The boundary has been extended slightly to include a leisure services unit in the north-east of the centre.

10.25 Our suggested boundary revisions are set out at **Appendix F**.

Development Management Policies

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

Retail Hierarchy and the Town Centre First Approach

10.27 The Council should adopt a 'retail hierarchy' as per the discussions above. Our recommended hierarchy is set out at Figure 10.15.1.

10.28 Linked to this, we recommend that the draft policy seeks to enshrine a 'town centre first' approach by including criteria which:

a. Support proposals which promote the identified centres as the preferred locations for town centre uses, including retail, leisure, office, visitor accommodation and appropriate residential and community facilities. A particular emphasis should be placed on residential living at centres of appropriate scale. By encouraging more residential living in town centres, footfall is created for both the daytime and night-time economy. One way of creating additional residential living in town centres is to consider the demand and supply for office accommodation, which is especially pertinent in the wake of the pandemic;

b. Ensure that development proposals are in keeping with the defined role of each centre (our definitions for each Tier of centre are set out in Figure 10.15.1); and

c. Stipulate that the retail hierarchy is the starting point for the consideration of retail impact and the sequential test, where proposals for town centre uses outside of town centre locations is concerned.

10.29 These elements could be introduced in to a re-worked version of adopted Plan Policy R1.

Proposals for the Loss of Town Centre Uses in Town Centre Locations

10.30 We comment on existing Policies R2, R3, R4 and R5 as follows:

- Policy R2 considers development in the Central Shopping Area. As per our commentary above, we think the Council could consider altering this definition to 'Central Retail and Commercial Area', to reflect the fact that there existing a multitude of town centre uses within that boundary. This builds on the text contained at Paragraphs 4.3.30 to 4.3.35 of PPW11, where it discusses the importance of a wide range of uses beyond retailing creating vitality and vibrancy in centres, in both primary and secondary locations. We have also recommended extending the boundary slightly to include some adjoining leisure, entertainment and commercial uses, which we consider should be afforded some consideration (in terms of any proposals for their loss) under this policy.

- Policy R3 explains how the Protected Shopping Frontages are to be considered. We consider this policy remains sound, though would add that it may be useful in the emerging Plan to also ask applicants to qualify 'how' they have actively marketed sites under criterion ii. The relevance of this is that it is often important in our experience to understand whether the marketing effort has focussed simply on local means of advertising (e.g. agency windows/trade papers), or whether it has been subject to a national marketing campaign across a wide range of media, including digital platforms.

- Policy R4 considers appropriate policy for District Centres. We consider that this policy remains broadly sound, though would suggest the Council considers whether the clause to resist continuous stretches of 3 or more units in 'non-shopping uses' should be amended to 'non-retail, leisure or community centre uses' in order to allow for a degree more flexibility in line with post-pandemic trends (this could be defined as Use Classes A1/A2/A3/D1/D2 in line with the Use Classes Order 1987(as amended)). A specific clause could be added about resisting runs of 3 or more residential units, if this is a particular concern. Our previous comments about 'how' marketing has been conducted also apply to the final clause of this policy.

- Policy R5 looks at appropriate policy for Local Centres. We consider this policy remains relevant as previously drafted.

Proposals for Town Centre Uses in Out-of-Centre Locations

10.31 The broad thrust of Adopted Policy R6 (Retail Development (Out of Centre)) remains relevant. This policy governs application of the needs, sequential and impact tests, as defined in PPW and TAN4. We would advocate an expansion of the text currently provided under Paragraph 5.286 to add greater specificity to the sequential test, and the requirement (as enshrined in case law) to satisfy the tests of 'availability' and 'suitability' when considering the appropriateness of sites (see also Section 7 of TAN 4). We also think it would be helpful to cross-reference the requirements of Paragraph 6.3 of TAN 4, or whichever is the prevailing guidance at the time of publication, when it comes to how to prepare a quantitative needs assessment. This will help to assure uniformity of approach.

10.32 There is no reference to the 2,500 sq m (gross) threshold for requiring retail impact assessment (Paragraph 4.3.26 of PPW11, 2021). This should be stipulated in the new policy. Importantly, PPW also makes it clear that local planning authorities can request retail impact assessment on smaller sites/units, where they consider there may be a significant impact on existing centres (Paragraph 4.3.27), and so this too should be discussed.

10.33 The Council may also wish to adopt a policy which seeks to ensure that the sub-division of large out-of-centre retail and leisure floorspace is subject to impact assessment. It would be a concern if out-of-centre locations sought to provide a scale of footprint which mirrors one of the current niches of a town centre, i.e. small footprint units suitable for start-up, high-end or service uses. As the economic pressures, described in Section 3, begin to effect even out-of-town retail parks, such proposals are becoming more commonplace across the UK.

Retail Provision within Strategic Sites

10.34 Existing Policy R7 (Retail Provision within Strategic Sites) inter-relates to Policy R6, and so our comments on that policy flow through. Beyond that, we consider the wording of the existing policy remains appropriate for considering retail development being provided within strategic sites. In the pre-planning of such sites, it is vital that regard is had to the needs and impact tests, both of which are properly referred to in the existing text, in order to ensure that the scale of retail provision is commensurate to the scale housing development being brought forward, as well as the potential impacts beyond its borders.

Direction for Retail Development

Convenience Floorspace

10.35 In line with our findings in Section 5, our quantitative assessment of capacity found there to be no capacity to support further convenience goods floorspace across the City when considered as a whole, by 2036. As such, we do not recommend that any sites are brought forward as part of the Local Plan to accommodate convenience retailing.

Comparison Floorspace

10.36 In line with our findings in Section 5, our quantitative assessment of capacity found there to be no capacity to support further comparison goods floorspace across the City when considered as a whole, by 2036. As such, we do not recommend that any sites are brought forward as part of the Local Plan to accommodate comparison retailing.

Direction for Leisure Development

10.37 Neither our qualitative, nor quantitative assessment of leisure need identified any significant gaps in the provision of larger commercial leisure facilities in the City. Please refer to Section 5 for a full discussion of this.

10.38 Notwithstanding our capacity assessments, there is a level of dissatisfaction with the provision of facilities for children in the City as a whole, and this may be a focus for future Plan policy.

Place-Specific Intervention

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

d. Central Retail and Commercial Area – there is an observed concern with homelessness and begging in the City Centre. The Council already has measures in place to assist with this issue over a period of time, for example the Real Change Campaign, and our Study provides empirical evidence to support this work from the viewpoint of creating safer places and improving vitality and viability. The cost of parking is also raised as a prohibition to making more regular visits to the central area.

e. Albany Road District Centre, Clifton Street District Centre, City Road District Centre and St Mellons District Centre – each of these District Centres is flagged as having poor environmental quality for the range of reasons described in the health-checks. This includes instances of unsightly and derelict buildings, issues with litter and cleanliness, and a lack of greenery in the streetscape. We would advocate reviewing how the public realm operates in each centre and looking at opportunities for betterment.

f. Albany Road District Centre/ Cowbridge Road East District Centre/ Merthyr Road, Whitchurch District Centre/ Whitchurch Road District Centre – a lack of available parking was flagged as a significant issue in each of these centres and the Council may wish to explore opportunities for providing additional parking and/or improving public transport accessibility or walking routes, as relevant.

g. Crwys Road/Woodville Road District Centre and Penarth Road/Clare Road District Centre – Traffic congestion was raised as a significant issue in both of these centres and the Council may wish to explore means of regulating traffic flow and/or imposing traffic calming measures where necessary.

Concluding Comments

10.40 This Study has addressed the current market shares and vitality and viability of the thirty-two centres which currently comprise the retail hierarchy within the Council area. We have provided a range of advice in respect of the plan-making process.

10.41 Notwithstanding our advice, the global, UK and Welsh economy is undergoing a significant change at the time of writing, as the economy recovers slowly from the pandemic and the fall-out from Brexit is not yet fully known. As advocated at 4.3.3 of PPW, we recommend that the Council therefore seeks to monitor the overall situation regarding its retail centres carefully and, potentially, puts in place a further 'light touch' review of the health of its centres during the course of 2023/2024.

Glossary of Terms

Bulky goods: Goods of a large physical nature (for example DIY, furniture, carpets) that sometimes require large areas for storage or display.

Source: Planning Portal (England & Wales)

Capacity: Forecast resident spending within the catchment area, with which to support existing and additional retail floorspace.

Source: Planning Portal (England & Wales)

Comparison Goods: Retail items not bought on a frequent basis, for example televisions and white goods (fridges, dishwashers etc.).

Source: Planning Portal (England & Wales)

Convenience Goods: Everyday essential items, such as food.

Source: Planning Portal (England & Wales)

Edge-of-Centre: When allocating sites or when determining applications that are in edge of centre locations, local planning authorities should consider the distance that a site is from the edge of a retail and commercial centre for it to be accessible by foot. Wherever possible edge of centre site allocations or development proposals should be located adjacent to a designated retail and commercial centre boundary, where this is not the case it should not normally be more than 200 to 300 metres from the edge of the centre. Factors such as the size of the retail and commercial centre, local topography and presence of physical barriers to access may influence any assessment. It may be appropriate to use a shorter acceptable distance between the centre and the development proposal if the centre is small. Local planning authorities should consider whether to specify advice in their LDP about accessible distances from retail and commercial centres to edge of centre developments.

Source: TAN 4

Expenditure per Capita: The amount of money spent on retail goods per person in each Zone across the Study Area.

Expenditure: Average annual expenditure levels for various forms of goods, multiplied by the population within the defined Study Area.

Experian Goad: Experian Goad is a retail property intelligence system that helps retail developers, property investors, planning professionals, and commercial agents to identify profitable locations for retail property development and investment projects. It offers comprehensive retail location plans and easy to use reports covering over 3,000 shopping areas in the UK.

Experian (MMG3): A population, expenditure and socio-demographic dataset that utilises the 2011 Census release, projected forward by using growth rates derived from Office for National Statistics projections and current age and gender estimates.

Financial & Business Services: An Experian Goad category comprising the likes of banks, building societies, employment agencies, legal services, estate agents and business services.

Source: Experian Goad

Goad Plans: A plan showing a bird's eye view of a retail centre including the exact location of all retail outlets and vacant premises, fascia name, retail category, and floor space. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured, allowing you to instantly assess the site quality of existing or prospective store locations.

Source: Experian

Independent Retailers: Retailers with less than ten outlets/ stores.

Source: Experian

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

Source: Experian Goad

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

National Multiple: Defined as retailers with ten or more stores/ outlets.

Source: Experian

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

Source: TAN 4

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

Source: Planning Portal (England & Wales)

Retail Impact: The potential effects of proposed retail development upon existing shops.

Source: Planning Portal (England & Wales)

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

Source: Experian Goad

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

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

Source: Planning Portal (England & Wales)

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

Source: TAN 4

Special Forms of Trading: Special forms of trading (SFT) are defined as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies.

Source: Experian

Turnover: Amount of sales per unit area of retail floorspace

Source: Planning Portal (England & Wales)

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

...

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

...

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

Source: TAN 4

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