
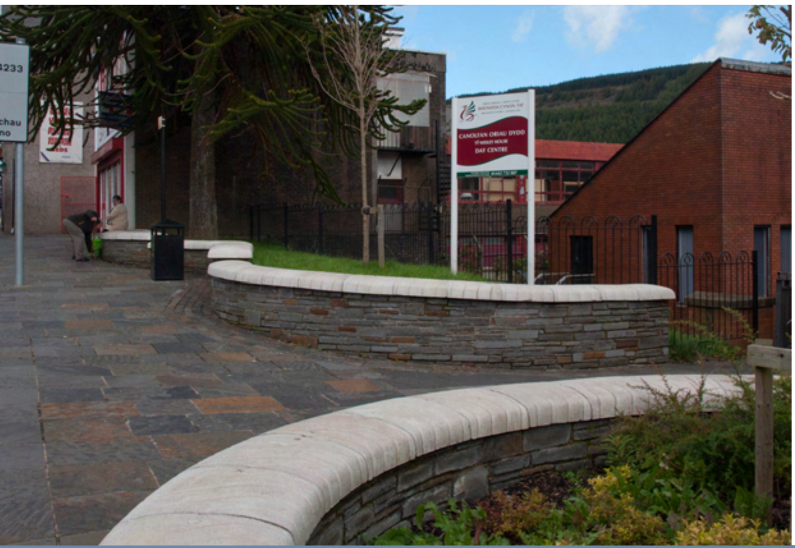


# Rhondda Cynon Taf Town Centre Regeneration Evaluation

## Ferndale - Final Report

May 2013

ERDF
Llywodraeth Cymru
Welsh Government
Ewrop & Chymru: Buddsoddi yn eich dyfodol
Cronfa Datblygu Rhanbarthol Ewrop
Europe & Wales: Investing in your future
European Regional Development Fund

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**Note: Document is set for double sided printing**

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# 1. INTRODUCTION

Regeneration of the town centres of Ferndale, Aberdare and Pontypridd are key priorities for Rhondda Cynon Taf County Borough Council (RCT) in supporting the wider corporate objective for the "Regeneration of our Communities" (RCT Community Strategy 2010). A programme of investment from the European Regional Development Fund (ERDF) and the Welsh Government (WG) was approved to help transform public spaces in each town centre and upgrade the public realm and townscape features to help strengthen the commercial core and town centre distinctiveness.

AECOM Ltd in association with Robert Chapman & Company were appointed in February 2011 to work with RCT to evaluate the effectiveness of the proposed regeneration activity and to advise on the vitality and viability of each town centre. The analysis will provide valuable evidence in assessing the impact of local investment in physical infrastructure and townscape and assist stakeholders in determining how to undertake future regeneration activity most efficiently.

The full evaluation process in Ferndale involved two key stages and ran from August 2011 to January 2013:

- ✓ Stage 1 Baseline Study - 2011
- ✓ Stage 2 Final Evaluation - 2013

This report is the **Final Evaluation for Ferndale**. Separate reports will be prepared for Aberdare and Pontypridd at the end of their investment programmes in 2015. This report establishes the final position of Ferndale with regard to the physical changes that have occurred within Ferndale town centre as well as assessing the critical aims and objectives of the proposed regeneration initiatives as detailed in the Convergence Programme Priority 5 Theme 1 Business Case Documents (Ferndale Final Version dated 18th February 2010) in relation to the actual achievements of the initiatives to date.

During the Baseline Assessment stage the project team:
- Critically assessed the programmes aims and objectives
- Evaluated RCT's approach to devising the overall Business Case (February 2010)
- Detailed the baseline conditions in respect of town centre performance, health, vibrancy and vitality, commercial market conditions and with consideration of the impact of the recession.
- Undertook bespoke town centre perception surveys in-order to gauge public attitudes towards the town centre.
- Provided critical reflections on the investment programme and made suggestions for improvements.

This Final Evaluation has built on the findings and research undertaken in the Baseline Assessment in order to identify impacts, outputs and changes induced by the programmes investments. The project team has:

- Reviewed progress, both physical and financial
- Reviewed commercial property market conditions
- Updated the Town Centre Health Check to identify change
- Compared the town centre performance against the counterfactual
- Compared the town centre performance against comparator towns
- Repeated the town centre perception survey to gauge shopper opinions of the town centre
- Considered the 'attribution' of outcomes and determination of 'net' impacts
- Provided conclusions and recommendations in respect of town centre regeneration

It should be noted that the physical work in Ferndale were substantially completed in December 2012 around the same time as the evaluation site visits and the full impact of the regeneration work may not yet have been realised. Further monitoring of the town centre activity would prove beneficial in testing the continued effects of regeneration in the future.

# PART ONE

# Regeneration Proposals

# 2. PROJECT OVERVIEW

The background context and need for intervention in Ferndale town centre was clearly set out in the Ferndale Regeneration Strategy (Future Ferndale, November 2006) and tested further through the five case business model in the Ferndale Business Case (February 2010). The Regeneration Strategy in particular highlights the importance of enhancing the quality of the town centre environment as a catalyst for investment and private sector confidence. Through consultation with local people, businesses and council representatives a number of priority investment areas were identified as set out below. The areas involved in the regeneration programme are highlighted in Appendix 01.

## 2.1 PROPOSED PHYSICAL IMPROVEMENTS

***The Anchor Public Realm Enhancements*** – The Anchor Pub/Hotel was identified by Rhondda Cynon Taf Council as having employment potential and provision for tourist accommodation. The Anchor is situated on a prominent cross-road in Ferndale town centre and, as part of the investment programme, the pavement directly outside the Anchor was to be widened and steps added to improve accessibility and encourage people to dwell longer. In addition, railings, paving and public art were to be installed to make the public realm both visually attractive and complementary to other public realm enhancements in the Strand (located opposite the Anchor Pub).

***Library Site Public Realm Enhancements*** – The library sits in the centre of the main retail area of Ferndale. The library was complemented by adjacent green space but it was behind a metal fence and under-utilised.

***Creation of Lime Street/Lake Street Pedestrian Walkway*** – The walkway was installed to increase accessibility between the already regenerated Lime Street car park and the town centre. The walkway passes through a now demolished fire station, which stood between the car park and the town centre.

***Creation of a new Public Space Adjacent to the Doctors Surgery –*** This project aimed to create a high quality public space on a vacant site between Trerhondda Chapel and Ferndale's doctor's surgery. The completion of this aspect of the scheme would only have been possible through the acquisition of the premises of the doctor's surgery.

***Darran Park Entrance Public Realm Improvements –*** The entrance to the Park was envisaged to be enhanced through the introduction of attractive public realm, with soft landscaping and way-markings from the town centre; creating a more fluid link between the park and the town centre.

***Strand Public Realm Enhancements –*** The commercial area north-west of Ferndale's High Street is known as the Strand and is an important commercial link between the core of the town and parking facilities. Redesign of the car park and public realm enhancements were intended to improve both the aesthetics of the area and the accessibility of the car park.

***High Street Public Realm Enhancements –*** The commercial core of Ferndale town centre is the High Street. The area was proposed to be enhanced through improved paving and introduction of street furniture.

***Enhance Visitor Interpretation in the Town –*** Interpretation panels were envisaged to be placed around the town and act as way-markings, acting to integrate the public realm improvements with Darran Park and the wider countryside.

Complementing the public realm work was a programme to support improvements to key buildings through:

***Townscape Enhancement Programme*** – Grants were to be made available to property owners for renovation and improvement works to the frontage and envelope of buildings at a ratio of 50:50, public sector to private sector investment. All businesses operating in the Commercial Improvement Area boundary (see Appendix 02) were eligible for Townscape grant funding.

### 2.2 EVIDENCE & RATIONALE

- The rationale for the regeneration of Ferndale has been supported by a strong national, regional and local policy context and evidenced in the Business Case (February 2010).

- The key role for Ferndale town centre is clearly supported by the "Valleys Renaissance Physical Regeneration Programme" (April 2008), a collaborative approach between six valley authorities and Welsh Government providing a unified approach to area wide regeneration priorities.

- The areas within Ferndale identified as in need of enhancement relate directly to the 'Future Ferndale: A Regeneration Strategy for Ferndale Town Centre'. These areas have thus been identified through a structured process of research and with extensive community consultation.

- Furthermore, the types of developments for each area identified as requiring regeneration have again been developed in the Regeneration Strategy on the back of research and community consultation.

- The process by which individual projects were selected is illustrated in the diagram opposite which is reproduced from the Business Case (February 2010).

**Figure 1: Ferndale Project Selection Process**

***1) Identification of baseline information -*** *socio-economic context, planning context, and historical context*

↓

***2) Ferndale appraisal -*** *Analysis of strengths, weaknesses and opportunities of the following: Built form, town centre, open space, streetscape and public realm, parking, and transport*

↓

***3) Identification of vision for Ferndale –*** *Ensuring appropriateness and a sense of place is maintained*

↓

***4) Creation of proposal areas –*** *Identification of seven key areas: Transport, Enhancing Gateways, Town Centre Enhancements; Darran Park Enhancements, Commercial Improvement Area, Improving Parking Facilities*

↓

***5) Formation of proposals –*** *Individual actions and proposals identified against each of the proposal areas*

↓

***6) Prioritisation –*** *Based on factors including community consultation outcome, impact, certainty, and synergy*

**Source: Business Case (February 2010)**

# 3. PROJECT AIMS & OBJECTIVES

The proposed public realm and townscape improvements detailed above were aimed at the regeneration of the town centre for the purpose of enhancing overall economic performance and improving the quality of life of residents. In order to encourage these desired goals a number of SMART (Specific; Measurable; Attainable; Relevant; Time-bound) objectives were identified in the Business Case (February 2010) as summarised in the table below together with the refined target/measures based on AECOM's analysis for the Baseline Report (August 2011).

## 3.1 KEY OBJECTIVES

**Table 1: Ferndale Town Centre Regeneration SMART Objectives**

| Objective | Measure/Target | Time Period |
|---|---|---|
| An economically stronger town centre | Maintain footfall above 15,000 per week | March 2015 |
| More employment opportunities for local communities | Create 3 new enterprises and 6 new jobs | March 2015 |
| Stronger commercial core with increased business numbers and reduced number of property vacancies | Maintain unit vacancy rate of below 9% | March 2015 |
| Increase in town centre visitors/users | Maintain footfall above 15,000 per week | March 2015 |
| Create a high quality and distinctive public realm that will:<br>- Increase confidence among local residents<br>- Increase confidence among business and entrepreneurs | Reduce the number of survey respondents stating the town centre as 'poor' to below 21% | March 2015 |
| Improve linkages to tourist and recreational activities in Darran Park in order to Increase tourist expenditure | Maintain footfall above 15,000 per week | March 2015 |
| Create a more accessible town centre via all public, private and sustainable modes of transport | Reduce the number of town centre visitors arriving by car to below 43% | March 2015 |
| Ensure local community members benefit from training opportunities and capacity building initiatives | Construction contract monitoring | March 2015 |

*Source: Ferndale Business Case (February 2010) and AECOM 2011*

## 3.2 EVALUATION OBSERVATIONS

- Whilst the aims and objectives of the project were clearly defined and scoped in the Business Case (February 2010), the proposed measures and benefits were not explicitly linked together. The above table was, therefore, modified by AECOM in seeking to make the appropriate links for evaluation purposes.

- All outcomes were planned to be realised by March 2015. At the time, this was an appropriate and realistic assumption being some two years following the planned completion of the public realm improvements and would have tied in with the planned completion of the townscape investment programme.

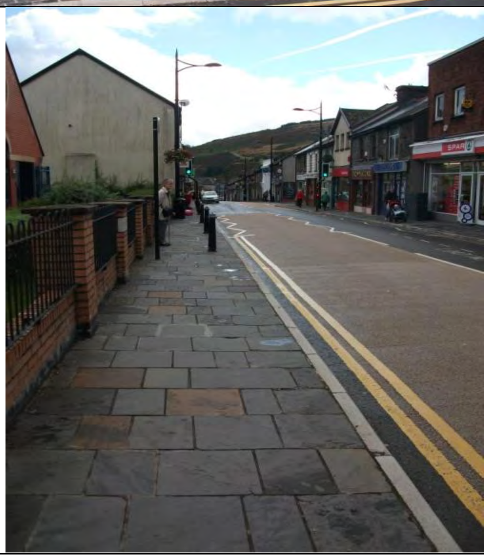
- The subsequent investment programme has been reduced and completed much earlier (2012). Consideration has, therefore, been given in this evaluation to the progress made in achieving the planned objectives and the potential for continuing improvement.

# 4 PROJECT DELIVERY

The table below provides evidence of works completed through photographs and observations made through site visits by the AECOM evaluation team.

**Table 2: Ferndale Town Centre Regeneration – Project Delivery Observations**

| Location | Observation | Evidence |
|---|---|---|
| The Anchor Public Realm Enhancements | This area of the town had been regenerated prior to the Baseline assessment. At the time of the site visit for the final evaluation the area was still in good condition and appeared to be well maintained. It was noted by members of the public that the area was being well used, particularly in the summer when people come and sit. The Anchor Pub/Hotel, however, remains vacant. |  |
| Library Site Public Realm Enhancements | This area of the town had been regenerated prior to the Baseline assessment. At the time of the site visit for the final evaluation the area was still in good condition, appeared to be well maintained and was observed to be well used. |  |
| Lime Street/Lake Street Pedestrian Walkway | This area of the town had been regenerated prior to the Baseline assessment. At the time of the site visit for the final evaluation the area was still in good condition and appeared to be well maintained. |  |
| New Public Space Adjacent to Doctors Surgery | The creation of new public space adjacent to the Doctors surgery **was not achieved** as the council were unable to secure the purchase of the necessary land, which is currently in private ownership. | **NO CHANGE DELIVERED** |

| | | |
|---|---|---|
| Darran Park Entrance Public Realm Improvements | Wide ranging improvements have been achieved; including paving to the main pedestrian routes to the park and enhanced gateways, creating better links between the park and the town centre. |  |
| Strand Public Realm Enhancements | The strand has been extensively re landscaped with new paving, improved lighting, revamped car park and the addition of a tree and bike rack. |  |
| High Street Public Realm Enhancements | Regeneration of the high street had already been completed at the time of the baseline evaluation. Since then the area has been well maintained and appears to be in good condition. |  |

| | | | |
|---|---|---|---|
| Enhance Visitor Interpretation in the Town | A number of finger post, way-markers and an interpretation map have been installed to direct people from Ferndale town centre towards Darran park. | |  |
| Townscape Enhancement Programme | One vacant, poorly maintained property has been brought back into use. | |  |

# 5 FUNDING & EXPENDITURE

A total of £3.073 million was approved for investment in the regeneration of Ferndale ( December 2010). Some £200,000 of this was targeted towards Townscape Improvements; including 50% contribution from the private sector.

As a result of project changes the actual out-turn expenditure for both elements of the project is shown in the tables below.

**Table 3: Ferndale Regeneration – Planned & Actual Expenditure**

| Funding Source | Business Case Proposed Feb 2010 | Project Re-profile Dec 2010 | Actual Out-turn (2012) |
|---|---|---|---|
| Convergence ERDF (Capital) | 2,175,000 | 1,758,864 | 1,320,251 |
| Convergence ERDF (Revenue) | | 268,392 | 193,263 |
| WAG Heads of the Valley Programme | 675,000 | 512,426 | 512,426 |
| DESH | | 47,342 | 47,342 |
| RCT – Capital Funding | 328,515 | 358,474 | 164,808 |
| RCT – Ineligible Revenue | | 27,658 | 27,658 |
| **Total Public Sector Investment** | **3,178,515** | **2,973,156** | **2,265,748** |
| Private Sector Leveraged | 100,000 | 100,000 | 39,744 |
| **TOTAL INVESTMENT** | **3,278,515** | **3,073,156** | **2,305,492** |

*Source: RCT Regeneration Project Team*

The changes in the cost plan between approval of the Business Case in February 2010 and re-profiling in December 2010 are the result of refinement to the design proposals, project cost savings achieved in the design process and competitive value driven contract negotiations. Further changes in the actual out-turn expenditure are the result of withdrawal of the proposals for the site around the Doctors Surgery (minus £378,375) due to failure to acquire the land and the reduction in the Town Enhancement Programme (minus £60,000) as a result of private sector difficulties in securing appropriate match-funding in light of market conditions.

The total public investment in Ferndale town centre, therefore, was £2,265,748 with just under £40,000 of private investment matched 50/50 in the one Townscape Enhancement Project which was completed.

# PART TWO

## Current Conditions – Baseline Update

# 6 COMMERCIAL MARKET CONTEXT

Notwithstanding news that technically the UK is no longer in recession, the general property market conditions remain very gloomy with the retail sector continuing to face severe pressure. Receiverships among national retail operators are continuing and all retailers are carefully scrutinising their property and location exposure as leases come up for review. Market rents continue to fall, as the availability of vacant property (and distress sales) continues unabated. Property values are now some 40% adrift of the 2007 peak with very little prospect for immediate improvement.

Meanwhile, local Business Rates continue to be based on open market rents passing in April 2008 before the real onset of the economic recession. The Welsh Government has also confirmed that the national revaluation will not now take place until 2017 at the earliest, in line with the rest of the UK; leaving many occupiers struggling. Landlords are also facing rates liabilities on empty properties after just 3 months, although consultation is proposed in 2013 to extend the relief to 18 months which, if implemented, would provide some breathing space for landlords in the future. With occupiers inevitably focused on total property costs, landlords increasingly have to discount rental values to secure new occupiers and pass on the rates liabilities. With lease terms also under pressure, there has been a consequential collapse in local investment sales across many small towns in Wales with very limited interest being shown and continued pressures on initial investment yields.

As a result there is no real consistency in local property markets, with values being largely deal driven with a range of rent-free periods and other concessions being provided. With market demand from national operators remaining constrained the general perception of the retail hierarchy in South Wales in terms of occupier demand is considered to be as follows:

**Table 4: Hierarchy of Retail Demand**

| | |
|---|---|
| 1. Cardiff | 6. Bridgend |
| 2. Swansea | 7. Neath |
| 3. Cwmbran | 8. Merthyr Tydfil |
| 4. Carmarthen | 9. Caerphilly |
| 5. Newport | 10. Pontypridd |

Source: Robert Chapman & Company 2012

Newport has emerged with market interest arising from the commitment by Queensberry and the City Council to the Friars Walk development providing 36,230 sq m (390,000 sq ft) of new space anchored by Debenhams and including a multiplex cinema and a range of shops and restaurants in the city centre.

## 6.1 FERNDALE TOWN CENTRE

It is difficult to define the rental tone of Ferndale today with traditional valuation methodology being obscured by the deal driven approach. As one would expect, Ferndale represents a remote retail centre but it is still an important retail and service centre for the local community. To put the Ferndale market into context, the change in market rents observed in the more established towns of Pontypridd and Aberdare are shown in the table below. This highlights the continued downward pressure which prevails in the market and would suggest rents in Ferndale would be sub £20.00 Zone A where deals are realisable.

**Table 5: Commercial Market Rent Trends**

| Zone A Rent | Pre-Recession | 2011 | 2012 |
|---|---|---|---|
| Pontypridd | £70 | £40-£45 | £35-£40 |
| Aberdare | £20 - £30 | £20 - £30 | £20+ |

Source: Robert Chapman & Company 2012

# 7. TOWN CENTRE HEALTH CHECK – UPDATE

There are a variety of indicators which contribute to an overall appreciation of town centre health, vitality and viability the implications of which are set out below. The Baseline Assessment established the conditions in the town in August 2011 relative to a number of indicators. Using the same indicators, this section of the report compares the health, vibrancy and vitality of the town at 2012 to the conditions in the town in 2011.

## 7.2 RETAIL MIX

Unlike the larger town centres there is no formal survey of local retail floorspace of small centres like Ferndale. A visual review of the mix of retail and leisure uses in the town centre was, therefore, undertaken by Robert Chapman & Company in March 2011 and AECOM in September 2012 and is summarised in the table below along with national averages for all town centres surveyed by Experian Goad for comparison.

**Table 6: Ferndale Retail Mix – March 2011 and September 2012**

| | 2011 | | 2012 | | National | |
|---|---|---|---|---|---|---|
| | Units | % Units | Units | % Units | 2009 % | 2012 % |
| **Comparison** | 13 | 25.0 | 14 | 26.9 | 41.9 | 41.4 |
| **Convenience** | 9 | 17.3 | 7 | 13.5 | 9.4 | 8.8 |
| **Retail Service** Hairdressers & Travel Agents | 9 | 17.3 | 8 | 15.4 | 10.4 | 9.8 |
| **Leisure Service** Bars & Cafes | 12 | 23.1 | 11 | 21.1 | 15.7 | 15.9 |
| **Business Service** Banks/Estate Agents | 4 | 7.7 | 4 | 7.7 | 8.6 | 8.5 |
| **Vacancies** | 4 | 7.7 | 7 | 13.5 | 12.8 | 13.6 |
| **Miscellaneous** | 1 | 1.9 | 1 | 1.9 | 1.2 | 2.3 |
| | | | | | | |
| **TOTALS** | 52 | 100 | 52 | 100 | 100 | 100 |

*Source: AECOM and Robert Chapman & Company – March 2011 and September 2012*

In 2011 Ferndale operated very much as a local service centre providing easy access and convenience for local residents. As a result the proportion of convenience stores amounted to 17.3%, which was almost twice the national rate. Furthermore, the proportion of retail units used for retail services (17.3%) and leisure services (23.1%) were also much higher than the national averages of 10.4% and 15.7%.

In 2012 the number of vacant units increased towards the national average with a consequential change in the rest of the retail mix. The level of Comparison shopping increased to nearly 27% with the opening of one further unit in the town centre, although remains significantly below the national average of around 42%.

The town has lost two convenience retail units with the proportion falling to 13.5%, although still significantly above the national average. The provision of Retail Services also declined slightly to 15.4%, Leisure Services declined to 21.1% and Business Services remained the same at 7.7% overall, close to the national average.

What is very notable in Ferndale is that the leisure services are predominantly down-market fast food restaurants and not the restaurants and cafes associated with tourism and higher visitor spend.

## 7.2 VACANCY RATES

The AECOM and RCT site visit (Table 6 above) identified some 7 vacant units in the core town centre, an increase of 3 units from the Baseline assessment in 2011. This results in a vacancy rate of 13.5% which is in line with the UK average of 13.6%; and nearly double the rate recorded in Ferndale in 2011.

RCT undertake annual surveys of town centre vacancies which appear to present a more positive picture. In 2012, the number of vacant units recorded by RCT remained stable at four units but the locations of the vacant units had changed. Rather than vacancies being located on the northern side of Strand vacancies are now on the southern side of Strand at the corner with High St.

The plans below (Figure 2) highlight the distribution of the vacant units in 2010 and 2012. In 2010, the core of the town centre along High Street appeared to be relatively robust with very few apparent vacancies, whilst Strand had a cluster of four vacancies along a very short stretch of retail units. The RCT survey, however, omits current or former Leisure Uses and has, therefore ignored the vacant Anchor pub on the corner of the Strand which remains vacant in 2012.

**Figure 2: Ferndale Vacant Unit Locations 2010 and 2012**


*Source: RCT Spatial Planning Team Vacancy Rate Survey – 2010 and AECOM 2012*

## 7.3 INDEPENDENT TRADERS

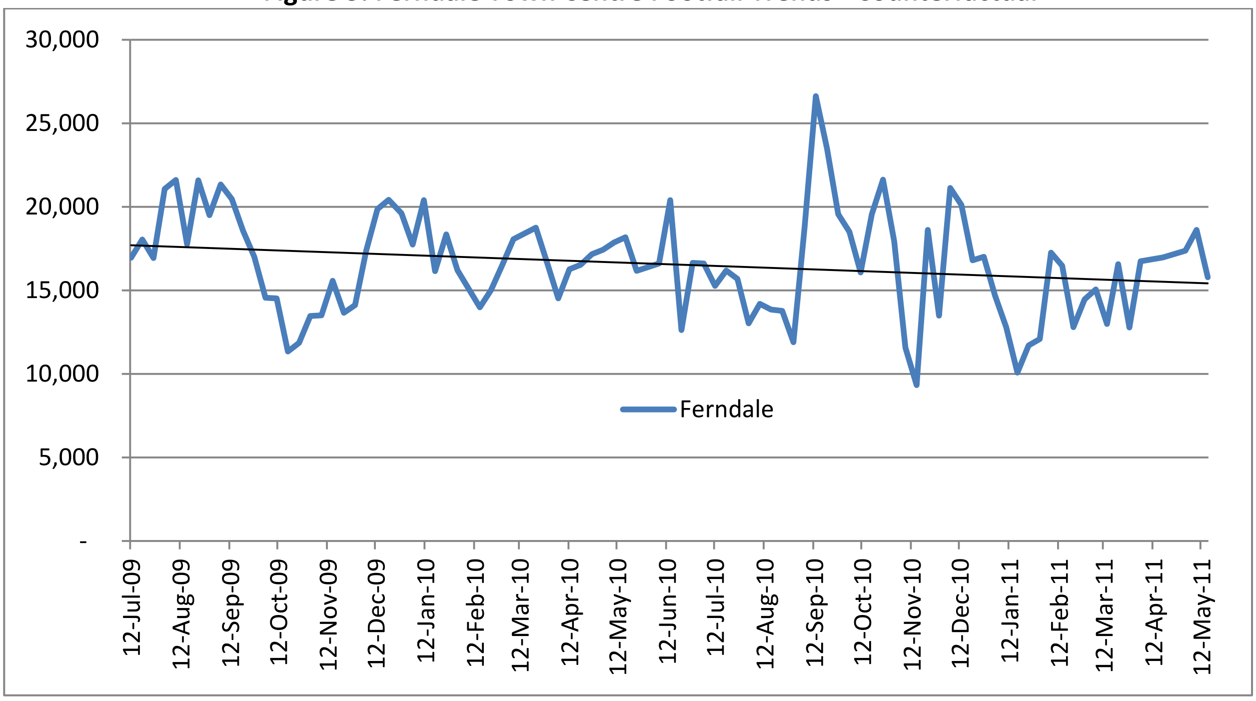
Within Ferndale there is a dominance of independent retailers. Of the 47 occupied units identified by AECOM only 8 are branches of national chains, which represent 17.0% of all occupied units. This means 83% are independent traders. Across the UK, multiple retailers tend to make up 31% of retail units, which suggests Ferndale has a significant stock of independent retailers. The high level of independent retailers is indicative of a small retail centre in which the offer needs to be closely aligned to the needs of the community.

## 7.4 PEDESTRIAN FOOTFALL – COUNTERFACTUAL TRENDS

According to Springboard town centre footfall data, footfall counts across the UK have declined every year since 2006. The rate of decline, however, appears to have slowed in recent years and may even have begun to 'bottom out'.

Footfall data in Ferndale is collected along High Street. According to Experian Footfall town centre data, during the second week of March 2011 the 'total visitor count' for Ferndale town centre came to 12,768. This is a change of -3,845 (-23%) on the same week in 2010. The trend for 2011 was one of consistently lower town centre footfall rates than 2010, whilst 2010 footfall rates were consistently lower than those in 2009. Thus, the baseline assessment (August 2011) highlighted the potential "counterfactual" trend for a continued fall in town centre footfall to around 15,000 per week on average as highlighted in Figure 3 below.

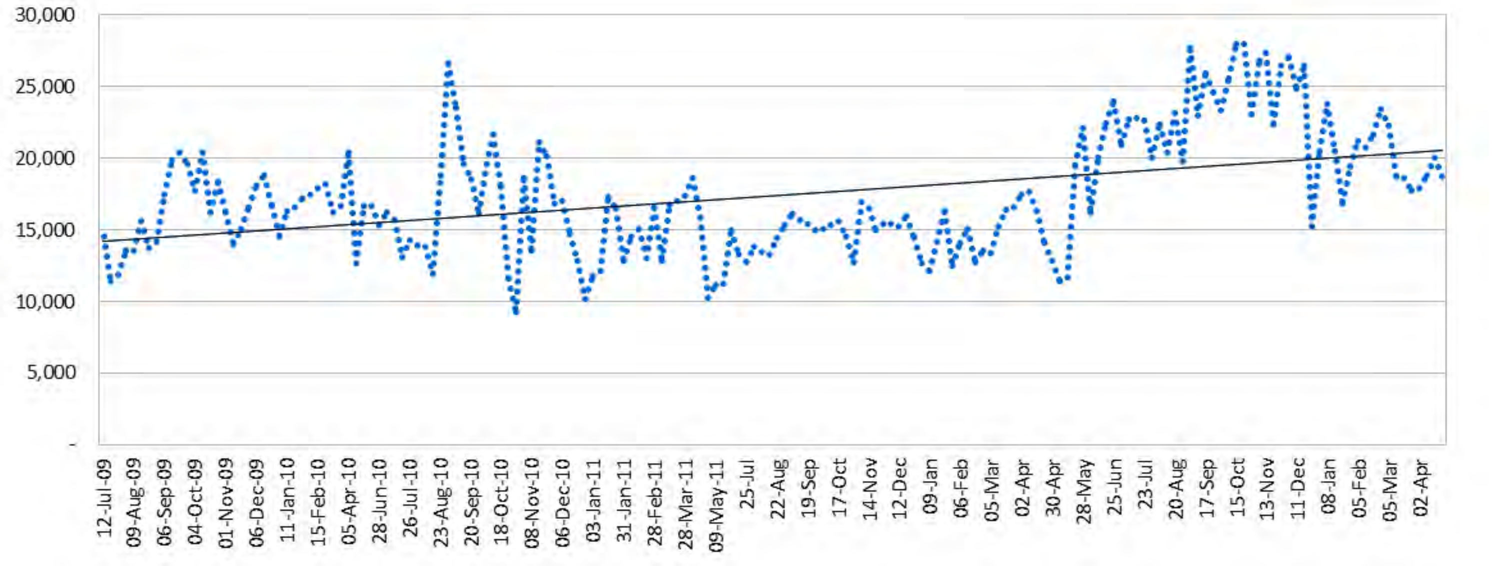
**Figure 3: Ferndale Town Centre Footfall Trends - Counterfactual**




*Source: AECOM Baseline Report August 2011*

Since the end of 2011, however, the weekly footfall counts in Ferndale appear to be reversing the previous downward trend, as shown in Figure 4 overleaf. Weekly visitors through the Autumn of 2012 exceeded 25,000, a level not previously seen since 2010. More recently (to April 2013) the numbers appear to be stabilising at around 20,000 visitors a week, substantially up on the low levels experienced in 2011 and some 5,000 up on the previous "counterfactual" trend line. The impact of this is considered further in the value for money assessment in Sections 13 & 14 of this report.

**Figure 4: Ferndale Town Centre Footfall – Actual Trends**




*Source: Experian Footfall, July 2009 to April 2013*

### 7.5 HEALTCHECK CONCLUSIONS

The healthcheck analysis highlights a town which continues to evolve in response to market conditions. Although there may be some early indications of increasing footfall and attractiveness, the town has continued to lose a number of local businesses leading to an increase in vacancy rate. This is inevitable, however, given the current market constraints and uncertainty over town centre trading and it remains early days in respect of seeing the true impact and benefit of the townscape improvements.

# 8. PUBLIC REALM AUDIT – COMPARED WITH BASELINE

This section of the evaluation report provides a summary and the key findings of two public realm audits undertaken by AECOM in March 2011 and October 2012. Separate Technical Reports have also been prepared for both Audits. All locations and scores from the audit are presented in Appendix 04. Undertaking a public realm audit involves extensive public and community consultation. The audit consists of two main components:

**Pedestrian Environment Review System Audit (PERS)** – focuses on assessing the level of streetscape provision for pedestrians, with particular consideration given towards the needs of more vulnerable pedestrians such as those with mobility or sensory impairment. The PERS audit framework considers the function of the public realm in enabling pedestrian movement, but it also considers the extent to which the pedestrian environment makes movement both easy and enjoyable through the provision of, for example, attractive public spaces.

A PERS audit is based on assessment against six components:

- **Links** – Sections of footway or separate footpaths. A single street may be comprised of a number of links in order to fully account for changes in pedestrian provision. The beginning and end of a link will often be related to a change in width or a side road crossing point, though other factors can be influential.
- **Crossings** – This component of the PERS framework can be used to assess both controlled and uncontrolled crossings. Crossings are audited where there are clear desire lines, such as across the ends of side roads; though the actual extent of provision can range from controlled crossings (e.g. zebra or pelican) to informal crossings where there are no dropped kerbs but a clear desire line.
- **Routes** – These are the courses taken linking a trip origin to a specific destination. These components of an audit seek to assess the quality of pedestrian provision to navigate to key locations; perhaps encompassing a number of separate links. The scores for related links, crossings and public spaces on a given route can be factored into the overall score for the route using the PERS software.
- **Public Spaces** – Areas which allow the public to rest and enjoy the public realm. These locations can vary widely in nature, ranging from simple seating areas or spaces offset from the main footway, to large green spaces accessible to the public where there are opportunities for activity.
- **Public Transport Waiting Areas** – Areas where people can wait for public transport services. This audit component assesses the provision for people to identify the correct location to access public transport services, the comfort of waiting areas and the ease of access to public transport from those areas.
- **Interchange Spaces** – These are areas in the immediate vicinity of major public transport hubs which allow people to access the wider streetscape. They can also include the spaces which allow access between one public transport mode and another (e.g. the walk between two complementary bus services).

**Community Street Audit (CSA)** - focuses on understanding how the streetscape is practically used by pedestrians, the elements that local people value, the barriers they face and their priorities for improvement. A CSA embraces the specific needs of pedestrians in a given locality and ensures that they can be fully accounted for in future improvements.

## 8.1 KEY FINDINGS

Each of the above PERS components (Links, Route, Crossing etc...) is sub-divided into a number of weighted factors which are individually scored (see table below):

| Link review | Crossing review | Route review |
|---|---|---|
| Effective width | Crossing provision | Directness |
| Dropped kerbs | Deviation from desire line | Permeability |
| Gradient | Performance | Road safety |
| Obstructions | Capacity | Personal security |
| Permeability | Delay | Legibility |
| Legibility | Legibility | Rest points |
| Lighting | Legibility for sensory impaired people | Quality of the environment |
| Tactile Information | Dropped kerbs | |
| Colour contrast | Gradient | |
| Personal security | Obstructions | |
| Surface quality | Surface quality | |
| User conflict | Maintenance | |
| Quality of the environment | | |
| Maintenance | | |
| | | |
| **Public transport waiting area review** | **Interchange Space review** | **Public Space review** |
| Information to the waiting area | Moving between modes | Moving in the space |
| Infrastructure to the waiting area | Identifying where to go | Interpreting the space |
| Boarding public transport | Personal safety | Personal safety |
| Information at the waiting area | Feeling comfortable | Feeling comfortable |
| Safety perceptions | Quality of the environment | Sense of place |
| Security measures | Maintenance | Opportunity for activity |
| Lighting | | |
| Quality of the environment | | |
| Maintenance and cleanliness | | |
| Waiting area comfort | | |

As the audit follows its planned route, each component of the streetscape is identified and scored using the standardised scoring system above. Using PERS software each of the factors and components is then given a score ranging from -100% to +100%.

Depending on the score, each aspect of the streetscape being audited along the route can then be categorised as Red, Amber or Green (RAG); where Red locations require the most urgent attention and locations categorised as Green do not require attention. The locations scoring Red in the PERS audit and those areas identified for enhancement by the CSA have been summarised below under the headings of the main components.

## 8.2 LINKS

Based on the standardised RAG thresholds within the PERS software, four of the links have been given an amber rating whilst the remaining links have received a green rating. No links have received a red rating. This compares well to 2011 when four links received a red RAG rating and only one received a green RAG rating.

The links which have been given an amber rating in 2012 are:

- **L1** Beech Street (south side)
- **L12** High Street (west) Strand to Brook Street
- **L2** Beech Street (north side)
- **L7** Cross Lake St (north) Darran Park to Fire Station

**CSA Findings**

The following summarises the location-specific points raised by Ferndale CSA attendees:

- **'The Anchor'**
  - General comments are that this area has been improved by the regeneration works and is now 'very nice'.
  - However, the Anchor Pub has now been derelict for two years and was identified as an eyesore.
- **Strand / Lake Street junction and car park**
  - Parking has improved greatly as a result of the street alterations in this area.
  - Trees planted in this area are appreciated and thought to be a good addition.
  - Despite the regeneration and inclusion of traffic calming measures there are still some conflicts between different road users in this area.
  - The public toilets were identified as an eyesore in this area.
- **Lime Street walkway**
  - This area was singled out by attendees as one of the best improvements the scheme has brought to the town.
  - The sculpture in the centre of the walkway was identified as a particularly welcome addition to the town, especially as it was designed and made in collaboration between the artist and local primary school children.
  - The walkway was noted for its lack of vandalism, although it was suggested that this was because the gates to the walkway were locked at night. Whilst this stopped vandalism it also stopped people from using the walkway in the evenings.
  - Some people believe the gates to the walkway and the wider regeneration to have been a waste of money but it was noted that they had not come up with better alternative ideas. One suggestion for a future initiative was to install a statue of a miner.
  - Anecdotally people are using the car park more.
- **Darran Park and link from High Street**
  - The new signage to and from the park was identified by audit participants although the small size of the new signage meant that some of the audit participants had not actually noticed the signs before they were pointed out during the audit.
  - Improved lighting along Cross Lake Street was praised as Cross Lake Street is the main link between the High Street and the Park.
  - 

- Open space on Cross Lake Street was praised for its transformative impact on the area. Prior to regeneration the area was a dumping ground but it has now been transformed into a tiered seating area. Stone walling around the area was also noted for its quality and positive addition to the environment.
- Pavement at the top of Cross Lake Street was singled out for being too narrow on both sides of the road. Participants of the audit naturally gravitated towards walking in the road rather than struggle past obstacles on the pavement. This area is particularly treacherous during school arrival and leaving times due to the heavy flow of both vehicle and pedestrian traffic. There was discussion amongst members of the community audit group to try and identify how this area could be improved. This was unsuccessful as it was felt that if the pavements were widened then there would not be enough room for cars to turn the 90 degree corner.

**High Street**

- Some shop fronts could be improved otherwise attendees did not feel it was very different from the time of the previous audit.
- One member of the public identified the puffin crossing as a bit of a hazard as vehicles drive through red lights. The crossing thus offers a false sense of safety.

In addition to the location-specific points raised during the CSA there were some general comments regarding the quality of the public realm in Ferndale (and the factors which affect the experiences of pedestrians). The following summarises these topics:

- Traffic is a major issue in the town, particularly the large lorries passing along the high street throughout the day.
- One attendee considered the paving could be a potential trip hazard as a result of its natural uneven surface.
- Anecdotally there are considered to be more visitors to the town, particularly cyclists and walkers.
- Attendees suggested residents of the town do not appreciate how much the regeneration has cost and some people haven’t bought into the scheme.

## 8.3 CROSSINGS

In 2011 one Crossing was given a red RAG score for Permeability, a parameter heavily influenced by the extent and appropriateness of crossing opportunities. In 2012 no Crossings received a red RAG rating although one received an amber RAG rating:

- **C4** Across Lake Street at High Street

The Dropped Kerbs parameter relates to the availability of viable dropped kerbs to allow pedestrians to cross side roads along the link, at the start and end of a link, and over the central carriageway. The parameter aims to assess both the extent of provision of dropped kerbs where appropriate, and their quality where provided.

In 2011 10 Crossings were given a red RAG score for the Dropped Kerbs parameter. In 2012 no crossings received a red RAG rating although one (C4, Across Lake Street at high Street) received an amber RAG rating.

**CSA Findings**

Owing to the specific nature of the crossing audit criteria there is relatively little evidence to draw on from the CSA. Nevertheless, a number of topics arose during the CSA which are related either directly or indirectly to the provision of crossings:

- CSA attendees widely welcomed the new puffin crossing on the High Street as it was seen to provide an appropriate degree of priority.

## 8.4 ROUTES

Two routes were formally assessed through the PERS audit: two routes to Darran Park, one from the High Street via Cross Lake Street (R1) and the other from the High Street via Beech Street (R2).

In regard to the CSA, Darran Park and the route via Cross Lake Street were navigated by the attendees. The route via Beech Street was partly navigated.

## 8.5 PUBLIC SPACES

There has been minimal change in the RAG ratings given to public spaces in Ferndale. The reasons for the minimal change are twofold; two of the three public spaces had been regenerated prior to the Baseline assessment; and Darran Park was only assessed in relation to the routes linking it to the town centre. Of the three public spaces audited one was given a negative overall score in the PERS audit but none scored a red RAG:

- **PS1** Darran Park

The remaining two spaces scored positively and were given amber and green RAG ratings respectively:

- **PS3** 'The Anchor' Pub
- **PS2** Library – High Street

**CSA Findings**

The following summarises the location-specific points raised by CSA attendees:

- **Darran Park**
    - Concerns that the park is not secure after dark and that youths are congregating and vandalising the area;
    - Signage from the town centre to the park has been improved but attendees felt that signage could be more visible and pronounced.

## 8.6 PUBLIC TRANSPORT WAITING AREAS

The one public transport waiting area audited – a bus stop – is on the east side of the High Street immediately south of Cross Street (coded PT1). The bus stop scored positively overall and was given an amber RAG rating. The rating has not changed from the Baseline assessment as the regeneration works in this area had been completed prior to the Baseline assessment.

Regarding the CSA, public transport waiting areas were not raised as an issue by any of the attendees. The only relevant concerns were those of traffic congestion. This is a potential issue at this bus stop where there is a shelter provided and pedestrians can cause obstruction to those navigating the link.

# 9 TOWN CENTRE PERCEPTION SURVEY UPDATE

A programme of user surveys has been undertaken in Pontypridd, Aberdare and Ferndale Town Centres as part of the evaluation of the regeneration activities in Rhondda Cynon Taf. This report presents the results of the final evaluation survey carried out in Ferndale in October 2012. Comparing findings from this survey against results in the baseline survey it has been possible to assess the impact of the regeneration activities in the town through the change in perception.

The surveys were undertaken at key locations in each town centre over four days. To ensure random selection, interviewers were required to interview the next person passing the sampling point. 18 interviews were completed in Ferndale.

Overall, the resulting sample comprised 56% women and 44% men. 33% of the sample was in employment, 22% unemployed, 33% retired 12% did not state their occupation. 33% were White British, 55% White Welsh and 12% did not state their ethnicity. 27% of the sample considered themselves to have a disability. It can be assumed that these demographic characteristics provide a reasonable representation of users of Ferndale.

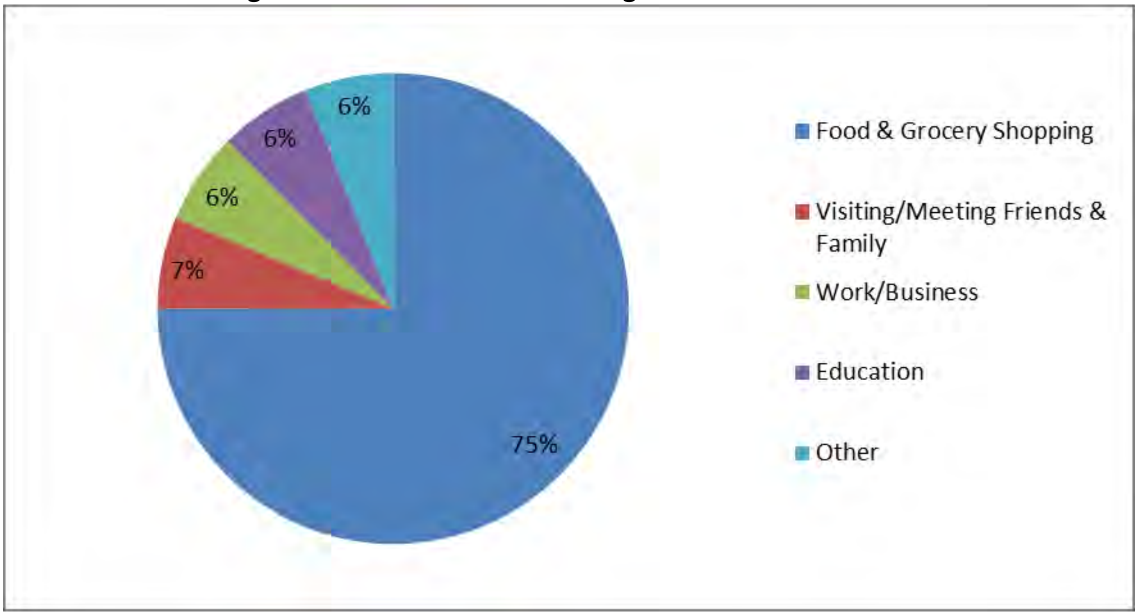
The results of the baseline survey for each town are reported in the following sections of this report.

## 9.1 KEY FINDINGS

The survey found that most of those visiting Ferndale did so frequently. Almost all respondents (94%) went there at least four times a week whilst the remaining 6% went there at least twice a week.

Of those responding (96%), the main reason for visiting Ferndale in 2011 was for food and grocery shopping. In 2012 food and grocery shopping was again the main reason for visiting Ferndale with 75% stating this as their main motivation. Other reasons for visiting Ferndale included meeting friends, going to school and for work.

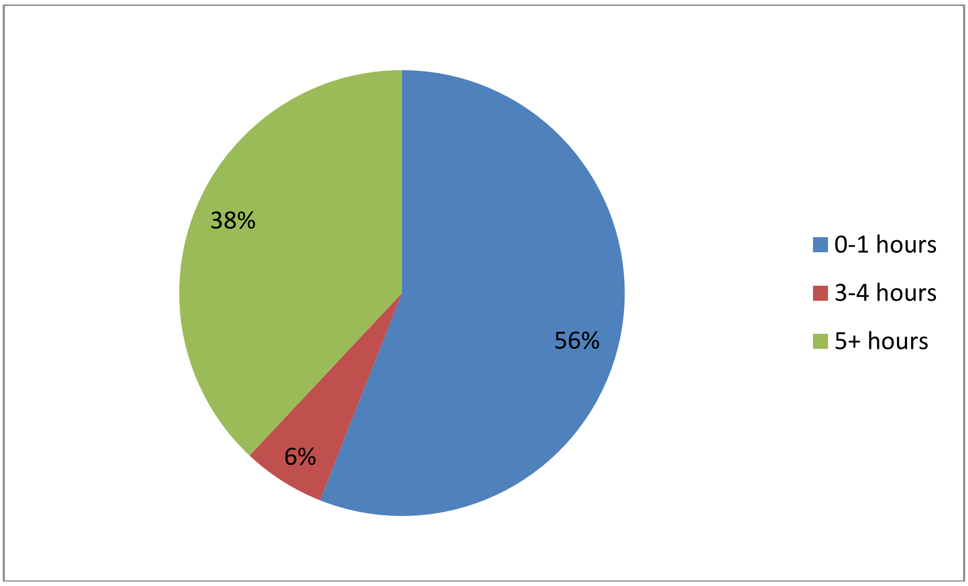
**Figure 5: Main Reason for Visiting Ferndale Town Centre**




*Source: AECOM Town Centre Survey 2012*

Most people visiting Ferndale stopped for a short time with 55% staying for one hour or less. This is a very similar proportion to 2011 when 51% or respondents stayed for less than one hour. In 2012, 39% of shoppers stayed for five hours or more and 6% remained for between three and four hours.

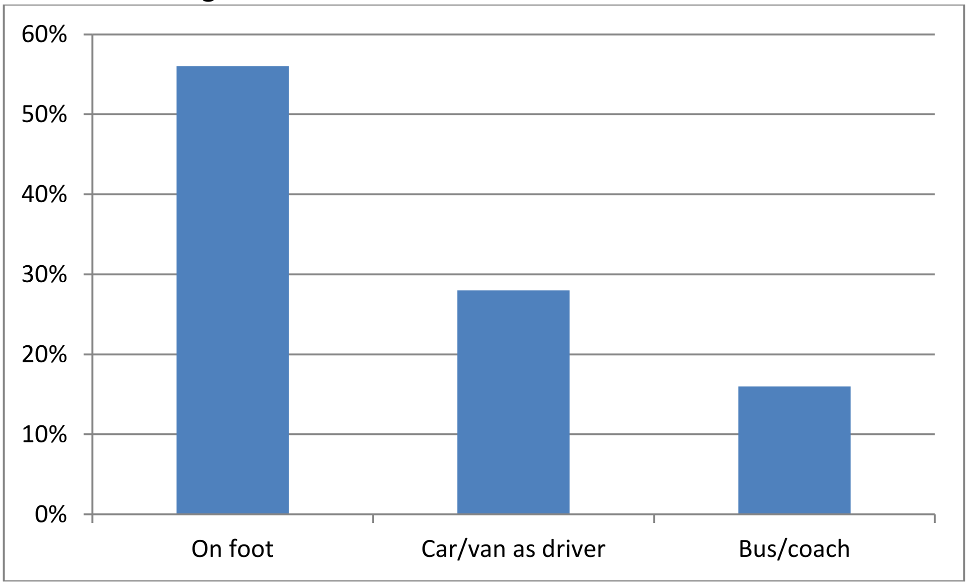
**Figure 6: Time Spent in Ferndale Town Centre**




*Source: AECOM Town Centre Survey 2012*

The survey found that most people go to Ferndale either on foot (56%) or by car as a driver (28%), whilst the remaining 16% travel to the town by bus.

**Figure 7: Mode of Travel to Ferndale Town Centre**

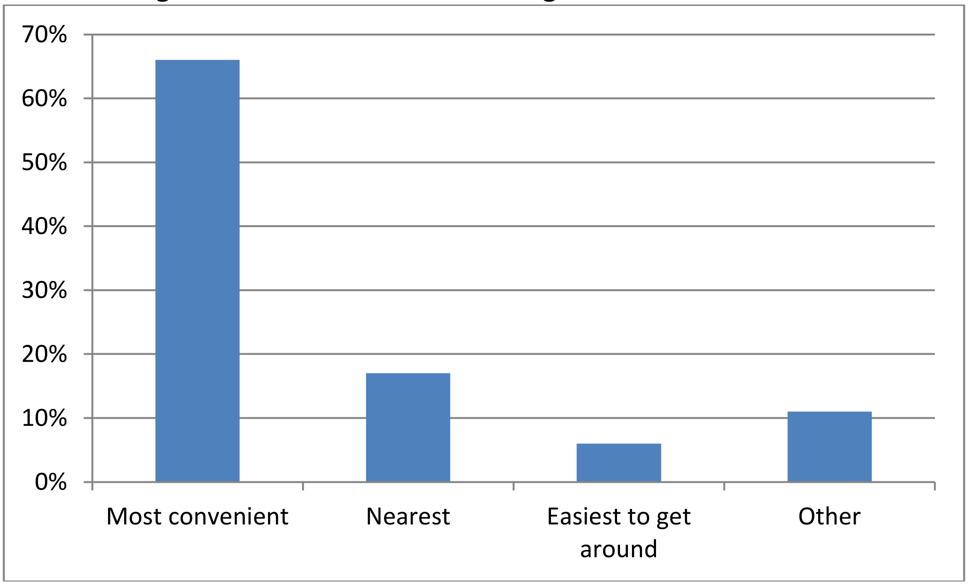



*Source: AECOM Town Centre Survey 2012*

## 9.2 PERCEPTIONS OF FERNDALE

When asked why they chose to come to Ferndale rather than anywhere else, most people said that it was either the most convenient (67%) or the nearest (17%) retail centre. 6% of respondents stated that they shopped in Ferndale as it was the easiest to get around. These responses are very similar to responses in 2011, where 56% or respondents stated that they shopped in Ferndale because it was the most convenient and just under one third or respondents stated that it was because it was the nearest.

**Figure 8: Main reason for choosing Ferndale Town Centre**

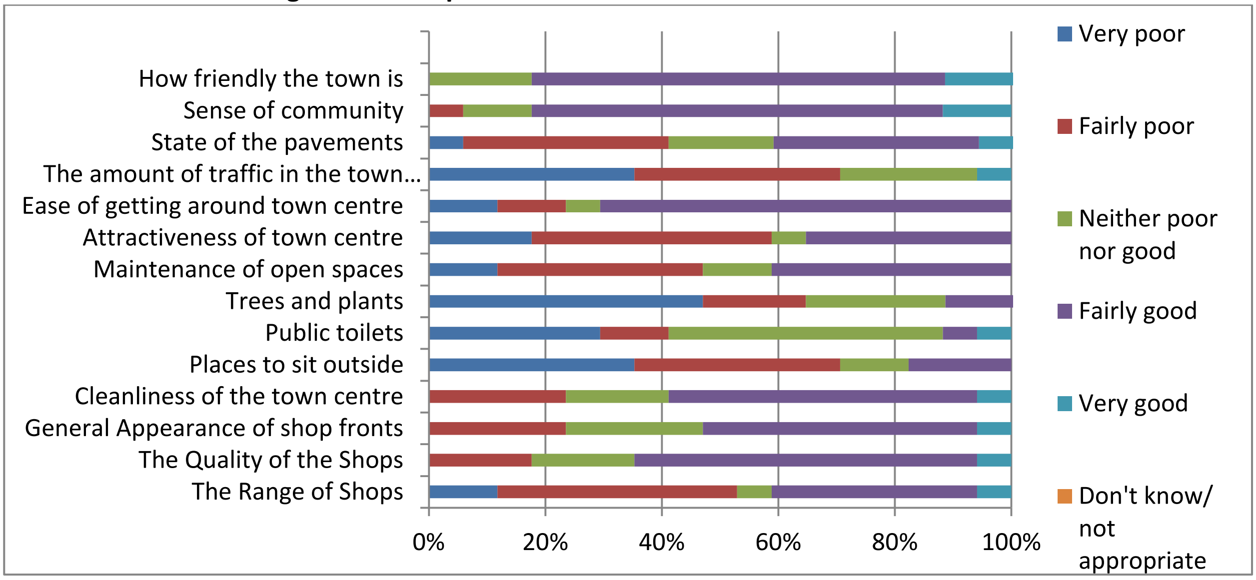



*Source: AECOM Town Centre Survey 2012*

Most respondents in Ferndale thought that the public toilets were very poor, that there are not enough places to sit outside and that there was too much traffic in the town centre. All of these issues were also identified as negative attributes in the 2011 survey.

All respondents considered the town to be friendly and they believed that there was a strong sense of community. Other factors that the majority of respondents rated as good were: the ease of getting around the town on foot, the cleanliness of the town centre, the general appearance of shop fronts and the quality of shops.

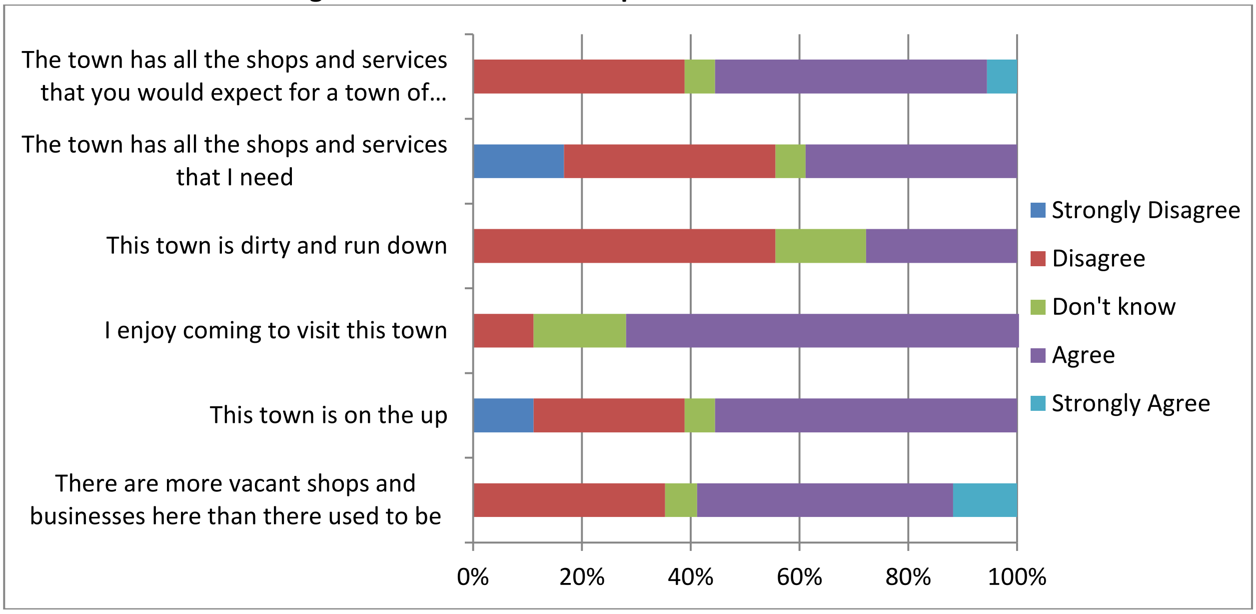
**Figure 9: Perceptions of Ferndale Town Centre**




*Source: AECOM Town Centre Survey 2012*

The majority of respondents felt that there were more vacant shops and businesses in the town than there used to be although the majority of respondents felt that the town was on the up and they enjoyed visiting the town. 45% of respondents believed the town had all the shops and services they needed whilst the remaining 55% felt the town did not have all the shops and services they needed.

**Figure 10: Views about the performance of the town centre**




*Source: AECOM Town Centre Survey 2012*

Respondents were also asked what they particularly like about the town. Most responses to this question were that the sense of community was particularly good. When asked to consider if there was anything they particularly dislike about the town the majority of responses identified the high levels of traffic and chaotic nature of the town centre.

When asked to consider how safe they felt in the town, all respondents felt safe during the day and the vast majority felt safe at night.

# 10. COMPARATIVE CENTRES

The 2011 Baseline Report positioned Ferndale alongside a number of comparable town centres in the region. Changes in the performance of these town centres relative to Ferndale are set out below together with further comparisons drawn from parallel research undertaken by members of the team into the town centres across the Welsh Government's designated Regeneration Areas (October 2012).

## 10.1 TOWN CENTRE MIX OF USES

The table below shows the mix of town centre uses in Ferndale compared with UK and the average for the towns across the Regeneration Areas in Wales together with individual town centre comparisons.

As previously highlighted for Ferndale, town centres across the Regeneration Areas in Wales also appear to present a much broader mix of uses compared to the UK national average.

Ferndale has one of the highest levels of Convenience retail units compared with other towns and is significantly above the Regeneration Area towns' average and the UK national average for all town centres. The level of Comparison retailing remains strong in Ferndale and not far off the Regeneration Area average which is surprising given the overall size of the town. The level of Retail Services is in line with the national average. Whilst the level of Leisure Services is high, the presence of Business Services in town is very poor.

**Table 7: Town Centre Mix of Uses**

| Town/Location | Convenience | Comparison | Retail Serv | Leis Serv | Bus Serv | Vacant |
|---|---|---|---|---|---|---|
| | Shop Units % | | | | | |
| **UK Average 2011** | **8.5%** | **41.4%** | **10.9%** | **15.9%** | **9.6%** | **13.7%** |
| **RA Towns Average** | **7.5%** | **28.7%** | **16.1%** | **18.9%** | **15.7%** | **13.1%** |
| **Ferndale (2012)** | **13.5%** | **26.9%** | **15.4%** | **23.0%** | **7.7%** | **13.5%** |
| **Newport (2012)** | 5.4% | 28.1% | 9.1% | 17.0% | 17.5% | 22.8% |
| **Aberystwyth (2011)** | 7.2% | 28.2% | 12.5% | 23.1% | 19.9% | 9.1% |
| **Llanelli (2008)** | 7.4% | 35.9% | 14.4% | 9.5% | 15.1% | 17.6% |
| **Merthyr Tydfil (2011)** | 7.2% | 33.6% | 13.4% | 18.5% | 19.5% | 7.9% |
| **Tredegar (2011)** | 9.5% | 26.6% | 17.1% | 17.1% | 12.7% | 17.1% |
| **Aberdare (2012)** | 5.8% | 37.2% | 18.6% | 20.9% | 10.5% | 7.0% |
| **Abertillery (2011)** | 5.1% | 21.7% | 13.8% | 22.5% | 12.3% | 24.6% |
| **Pontypridd (2012)** | 6.7% | 38.8% | 14.6% | 16.9% | 12.4% | 10.7% |
| **Ammanford (2012)** | 8.4% | 35.1% | 13.6% | 19.5% | 16.9% | 6.5% |
| **Brynmawr (2011)** | 5.8% | 25.8% | 17.5% | 20.8% | 10.0% | 20.0% |
| **Bargoed (2012)** | 6.9% | 28.3% | 20.7% | 17.9% | 15.2% | 11.0% |
| **Ebbw Vale (2011)** | 4.7% | 34.1% | 14.7% | 19.4% | 15.5% | 11.6% |
| **Pontadawe (2012)** | 9.9% | 16.5% | 18.7% | 22.0% | 26.4% | 6.3% |
| **Clydach (2012)** | 9.0% | 19.4% | 28.4% | 25.4% | 11.9% | 6.0% |
| **Ystradgynlais (2008)** | 13.7% | 33.8% | 11.8% | 13.8% | 17.6% | 9.8% |

*Source: Welsh Government - Evaluation of Current Practice in Relation to Town Centre Regeneration (October 2012) based on PER Consulting Analysis September 2012.*

### 10.2 TOWN CENTRE VACANCY RATES

The chart below shows the vacancy rate for Ferndale (October 2012) compared with the latest available figures from towns across the Regeneration Areas and the UK average rate of 14.5%. The chart highlights Ferndale (13.5%) close to the overall average town centre vacancy rate situated below Barry (14.2%) but higher than other RCT towns of Pontypridd (10.7%) and Aberdare (6.0%).

**Figure 11: Town Centre Vacancy Rates Compared - 2012**


*Source: PER Consulting Analysis 2012 from various sources. UK Average from "The Local Data Company"*

### 10.3 VACANCY RATE TRENDS

The chart below illustrates the vacancy rate trend in Ferndale against the average town centre vacancy rates across the Regeneration Areas (where data is available) and the UK from 2003.

Town centre vacancy rates in Ferndale have generally been much higher than the national and Regeneration Area averages. The rate appears to have temporarily improved somewhat between 2009 and 2011; although this may be due to inconsistencies in data collection and the apparent omission of former leisure uses. More recently the underlying town centre vacancy rate recorded by AECOM's site visit shows it return closer to the RA and National average.

**Figure 12: Town Centre Vacancy Rate Trends**


*Source: PER Consulting Analysis 2012. UK Average Trends based on Experian Goad and The Local Data Company*

## 10.4 TOWN CENTRE FOOTFALL TRENDS

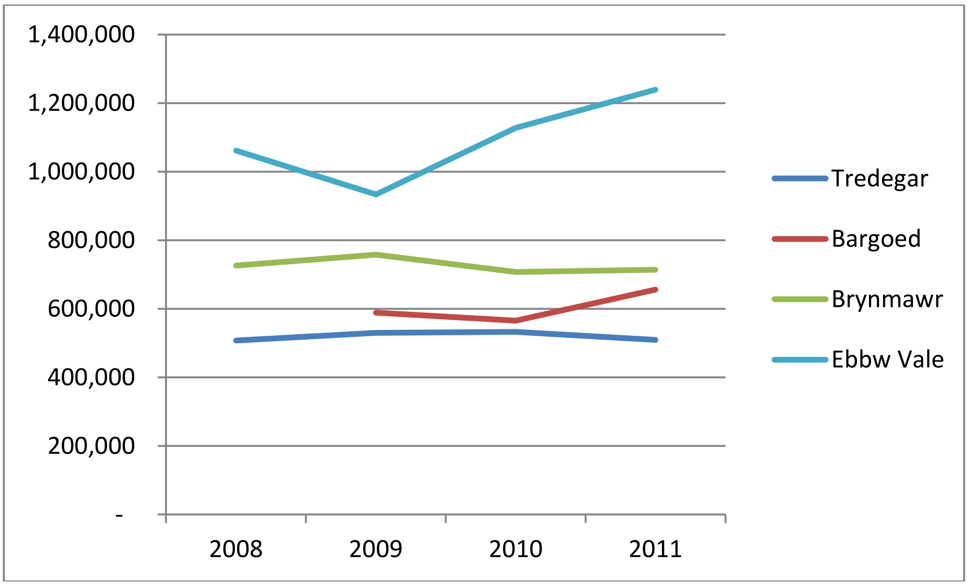
Annual town centre footfall estimates have been assimilated from weekly data counts captured for subscribing local authorities either by Experian or Springboard using automated counters installed in key locations. Not all town centres are covered by automatic footfall counters and we, therefore, only report on those centres where information exists.

There is inevitably an order of magnitude difference in footfall numbers between the major city centres in the RAs and the more local town centres. Annual footfall in Swansea and Newport for example is currently around 8 million people, compares with around 1 million visitors for Ebbw Vale and Abertillery, 700 - 800, 000 people a year in Brynmawr and Aberdare and around 500 -600,000 in Tredegar and Bargoed. Annual average footfall for Ferndale is much lower at around 150 -200, 000 people.

Nationally, footfall counts in towns and cities have typically shown a decline of around 5-6% per annum since 2009. The chart below highlights the trends in footfall for Swansea and Newport, both of which have fallen in line with national trends indicated by Springboard data. Swansea has fallen by 21% from around 10 million visitors per annum in 2008 to 7.8 million visitors in 2011. Newport has declined even further, by 24% from a peak of 11.5 million visitors in 2008 to 8.7 million in 2011; although there have been more recent reports of Newport bucking the trend in week on week comparisons in the first half of 2012 which may be attributed to the increased student presence in the city centre.

A more varied picture of footfall trends emerges in the smaller towns in the Heads of the Valley (HoV) RA as shown in the chart below. Ebbw Vale has steadily increased its footfall over the past two or three years. In 2011, Ebbw Vale captured some 1.2 million visitors, up 10% per annum since 2009 which supports the recent improvement in vacancy rates. Bargoed has also shown a recent uplift in footfall, +16% from 2010 with 655,900 visitors in 2011, again reinforcing the improvement in the towns' vacancy rate. Footfall trends in Brynmawr and Tredegar are relatively flat, down only around 5% over the past three years for which data is available.

**Figure 13: Heads of the Valleys Towns – Footfall Trends**




*Source: PER Consulting Analysis 2012*

The graph below illustrates footfall trends in the three RCT towns of Pontypridd, Aberdare and Ferndale as well as an average weekly footfall trend line for the three towns combined. The figures are for counts up to October 2012 and begin to indicate a small rise in footfall in all three towns over the past 12 months or so.

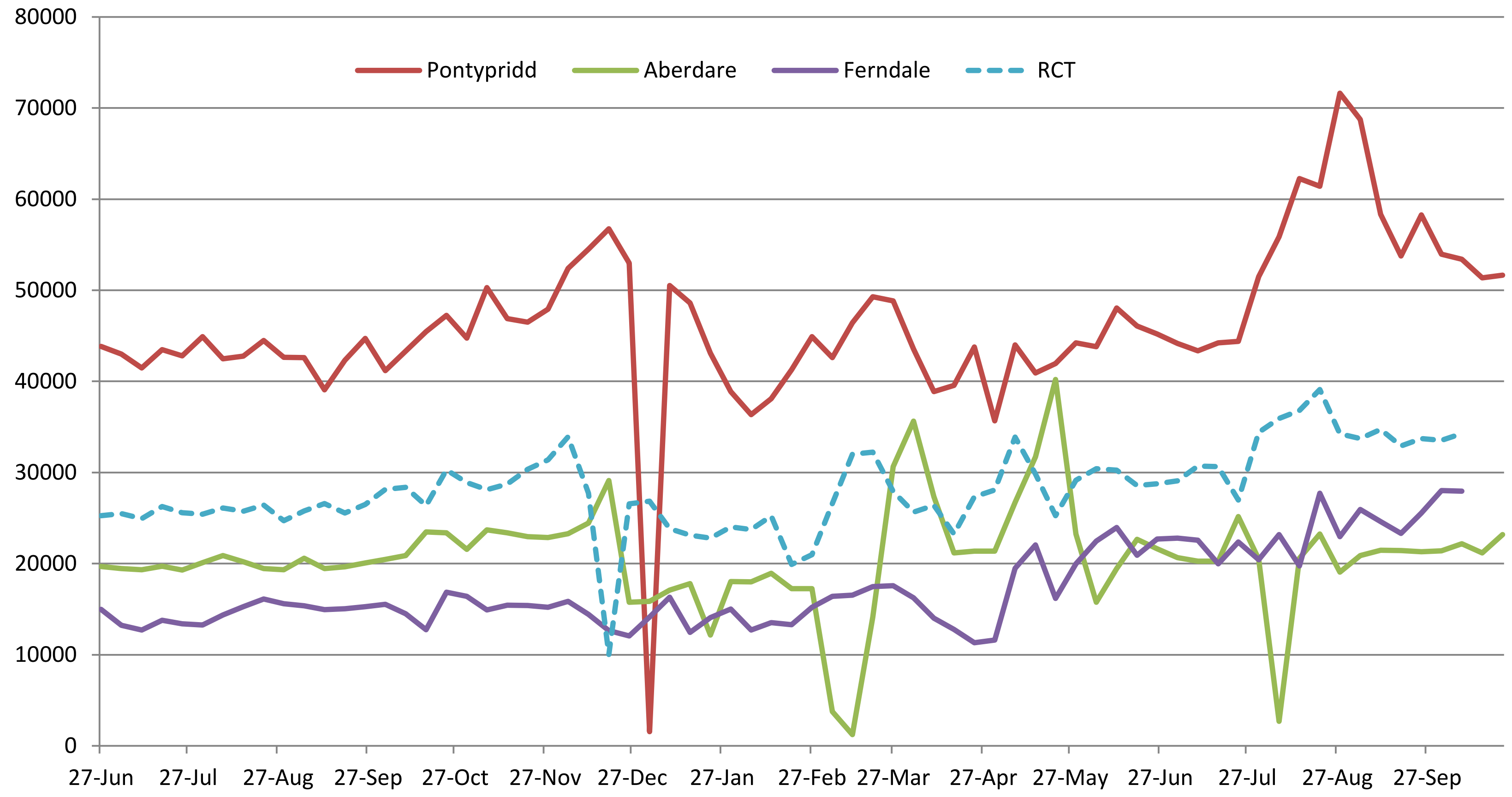



**Figure 14: RCT Towns Footfall Trends**

# PART THREE

## Regeneration Impact

# 11 PROJECT ACHIEVEMENTS

The table below summarises the project achievements against the original project objectives

**Table 8 Achievements against Project Objectives**

| Objective | Measure/Target | Achieved? | Comments |
|---|---|---|---|
| An economically stronger town centre | *Maintain footfall above 15,000 per week* | ✔ | ***ACHIEVED*** *Footfall Counts* ***UP*** *to 20,000 per week* |
| More employment opportunities for local communities | *Create 3 new enterprises and 6 new jobs* | ✘ | **PART ACHIEVED** *1 new enterprise and 2 new jobs created due to poor take-up of grant from private sector despite comprehensive marketing programme* |
| Stronger commercial core with increased business numbers and reduced number of property vacancies | *Maintain unit vacancy rate of below 9%* | ✘ | **NOT ACHIEVED** *Vacancy rates have increased to 13.5% reflecting continuing poor national and local market conditions* |
| Increase in town centre visitors/users | *Maintain footfall above 15,000 per week* | ✔ | ***ACHIEVED*** *+5,000 against the Counterfactual Trend* |
| Create a high quality and distinctive public realm that will:<br>- Increase confidence among local residents<br>- Increase confidence among business and entrepreneurs | *Reduce the number of survey respondents stating the town centre as 'poor' to below 21%* | ✘ | **NOT ACHIEVED** *Survey respondents were less favourable - potentially reflecting the increase in empty shops* |
| Improve linkages to tourist and recreational activities in Darran Park to increase tourist expenditure. | *Maintain footfall above 15,000 per week* | ✔ | ***ACHIEVED*** *Anecdotal comments indicate more visitors and cyclsts in town* |
| Create a more accessible town centre via all public, private and sustainable modes of transport | *Reduce the number of town centre visitors arriving by car to below 43%* | ✔ | ***ACHIEVED*** *Only 33% used Car in 2012 survey. Some 55% arrived by foot reflecting strong local connections.* |
| Ensure local community members benefit from training opportunities and capacity building initiatives | *No explicit measures specified* | ✔ | ***ACHIEVED*** *Design enhancements built capacity of local school children and voluntary groups* |

*Source: AECOM Final Evaluation 2013*

# 12 GROSS OUTPUTS ACHIEVED

The project Business Case (February 2010) identified a number of ERDF Operational Programme Outputs and Results to be met from the town centre regeneration in Ferndale. Table 9 below highlights the original planned targets compared with the actual outputs delivered on project completion in December 2012.

**Table 9: Ferndale Town Centre Regeneration ERDF Outputs and Indicators**

| Indicator | Regeneration Targets 2010 | Outputs Delivered 2012 | Variation |
|---|---|---|---|
| **Public Realm Enhancements** | | | |
| **Land Developed** | O.36ha (3,600 sq m) | 0.7935 ha | +0.396 ha |
| **Physical Improvement Schemes** | 1 | 1 | 0 |
| **Townscape Enhancement Programme** | | | |
| **Premises Created or Refurbished** | 280 sq m | 99 sq m | --181 sq m |
| **Enterprises Accommodated** | 3 | 1 | -2 |
| **Jobs Accommodated** | 6 – original estimate<br>14 – revised method | 2 – original method<br>4.95 – revised method | -4 original method<br>-9.05 revised method |
| **Gross Jobs Created** | 6 | 2 | -4 |

*Source: AECOM Final Evaluation 2013*

Whilst the total area of land "developed" in Ferndale increased slightly from the original target, the key outputs in terms of premises refurbished, enterprises accommodated and jobs created all fell short of original ambitions due to the poor take-up of Townscape Enhancement Grants by the private sector landlords in town. Further details of the proposed and actual outputs are set out below.

### 12.1 LAND DEVELOPED

The public realm enhancement projects were originally expected to cover 3,600 sq m (0.36 ha) of the town centre from the cumulative development of seven key projects as shown in Table 10 below.

**Table 10: Cumulative Public Realm Outputs – Variation in site areas**

| Public Realm Project | Business Plan estimated 2010 (ha) | Actual Completed Area 2012 (ha) | Out-Turn Variation (+/- ha) |
|---|---|---|---|
| The Anchor | 0.007 | 0.0323 (completed) | +0.0253 |
| Library | 0.0325 | 0.033 (completed) | +0.0005 |
| Lime St Walkway | 0.0225 | 0.0252 (completed) | +0.0027 |
| High St | 0.0873 | 0.2424 (completed) | +0.1262 |
| The Strand | 0.0727 | 0.2234 (Completed) | +0.1507 |
| Darran Park Gateway | 0.1275 | 0.2372 (Completed) | +0.1097 |
| Doctors Surgery | 0.0191 | 0 | -0.0191 |
| **TOTAL** | **0.3686ha** | **0.7935 ha** | **0.396ha** |

*Source: RCT Final Measurements 2012*

Although one scheme, at the Doctors Surgery site was unable to proceed due to land ownership constraints, the total area of land involved in public realm improvements has increased following more accurate measurements of the final design proposals.

## 12.2 TOWNSCAPE ENHANCEMENT PROGRAMME

The original rationale used to gauge potential take up of the Townscape Enhancement Programme placed greatest emphasis on an assessment of previous demand for financial support in Ferndale. Although consideration was given to the economic downturn, in hindsight, this was under estimated. The global recession and weak recovery is reported by many as the worst in over 100 years and, as a result, confidence by the private sector to invest in the Townscape Enhancement Programme, with 50% of the total eligible project cost bared by the applicant, was initially very slow; despite a comprehensive marketing programme. Marketing activities included mail shots to all eligible properties within the eligible boundary, canvassing with a project officer visiting each property and promotion in the Town Centre Forum. In addition, a series of press releases, supported with leaflets displayed at prominent locations throughout the town, including the Trerhondda Chapel and the Library and information displays at all community consultation events were undertaken in the town.

This promotion resulted in 4 applications being received in 2011. Only 3 were able to secure sufficient match funding and were initially approved to proceed since no further applications emerged over 12 months. Despite 3 approvals, two properties were subsequently withdrawn by the applicants due to funding constraints; leaving only one property going through to completion as shown below.

**Table 11: Townscape Enhancement Programme – Project Delivery & Outputs**

| Property: 29 High Street (Derelict)<br>Before: After: | Private Investment | Sq m Refurbished | Enterprises Accommodated | Jobs Accommodated | Jobs created |
|---|---|---|---|---|---|
|   | £39,744 | 99sqm | 1 | 4.95 | 2 |
| **Total Outputs:** | **£39,744** | **99 sqm** | **1** | **4.95** | **2** |

*Source: RCT Final Measurements 2012*

With only one project being delivered through the Townscape Enhancement Programme, there is a significant shortfall in the planned project outputs. It is now recognised that due to the current market conditions businesses in Ferndale are consolidating and looking to safeguard jobs and laying the foundations for future business growth rather than looking at immediate investment. This is supported with feedback from those businesses who have enquired about TEP, a further 6 enquiries for TEP were received in 2012, which have resulted in no TEP applications. Feedback from enquirers have evidenced a lack of match-funding and the slow property market i.e. businesses feel they are unlikely to see a return on their investment reflected in their property value as the reasons for not taking up the grant.

### 12.3 JOBS ACCOMMODATED

The original Business Case estimated the number of jobs likely to be accommodated on the basis of 2 jobs per enterprise. With the proposal to accommodate 3 new enterprises, the original target assumed 6 new jobs could be accommodated. On project approval, however, an alternative approach was agreed with WEFO based on typical employment densities for retail floor space assuming 1 job to 20 sq m.

On this revised basis, the 280 sq m of refurbished floorspace should, in theory, be able to accommodate up to 14 new jobs. Following the same approach, some 99 sq m of floorspace was refurbished at the end of the project which, in theory, should be able to accommodate some 5.95 new jobs.

# 13 NET OUTPUTS DELIVERED

Project appraisal guidance typically requires the Gross Outputs identified from the project delivery to be adjusted to "Net Additionality" after allowing for:

**Leakage**: the proportion of gross jobs that may be taken by people outside the geographical area being assessed.

**Displacement**: reflecting the potential reduction in activity elsewhere in the area.

**Substitution**: where a firm substitutes one activity for a similar one (such as recruiting a jobless person while another employee loses a job) to take advantage of public sector assistance.

**Multiplier Effects**: the further economic activity (indirect and induced jobs) generated as a result of the additional direct income and supply chain activity.

**Deadweight:** the proportion of employment that may have occurred in the area without public intervention based on the Do Nothing/Reference Case.

UK national guidance provides a range of discount factors (Low, Medium and High) which can be applied to the gross job calculation for each element. The assumptions used are described below based on professional experience and reflecting local socio-economic and market conditions in Ferndale.

## 13.1 LEAKAGE

The degree to which the benefit of the jobs created "leaks" out of the target area will depend on the capacity of the local labour market to respond to the skills demanded by employers. National guidance suggests the categorisation of the range of leakage impacts ranging from Low (10%) to High/Very High (50-75%). In the case of Ferndale, the two new retail posts created are known to have been taken up locally which means there is zero leakage of benefits from the immediate local area.

## 13.2 DISPLACEMENT

Other towns in RCT and elsewhere are undergoing similar regeneration programmes. The very local nature of the project applicant suggests the project would not have occurred elsewhere and zero displacement is considered to have occurred.

## 13.3 SUBSTITUTION

The project is discrete to Ferndale and project monitoring reports demonstrate there has been no substitution of employment from elsewhere.

## 13.4 DEADWEIGHT

Without the public sector grant contribution to the improvement of what was considered to be a derelict building in the centre of Ferndale, the refurbishment would have been totally unviable for the private sector to complete alone. The "deadweight" effect is, therefore, considered to be zero. The constraints on private sector finance are clearly demonstrated by the low take-up of the available grant support and the collapse of a number of initial enquiries either due to funding difficulties or concerns about future viability.

## 13.5 MULTIPLIER EFFECTS

There are two multiplier effects which capture the extent to which local increases in employment and associated income are retained within the geographical area being assessed:

The **supply chain multiplier** captures the extent to which businesses draw on local suppliers when purchasing goods and services – thereby creating further indirect employment and expenditure.

The **income (or induced) multiplier** captures the extent to which wages and profits are spent locally.

For simplicity, most appraisals use a combined or composite multiplier which captures the overall effects of both activities. The scale of multiplier impact which should be applied to projects will depend on the ability of the local or regional economy to service the additional expenditure capacity being created and the strength of local supply chains. In the case of the small retail unit refurbished in Ferndale town centre, a nominal multiplier impact of 1.2 has been applied.

### 13.6 NET EMPLOYMENT IMPACT

The table below shows the overall net employment benefit accruing to local area of Ferndale.

**Table 12: Net Outputs Delivered**

| | |
|---|---|
| | **North** |
| **Gross Jobs** | **2.0** |
| **Less Leakage** | **-0** |
| **Less Displacement** | **-0** |
| **Less Substitution** | **-0** |
| **Plus Multiplier** | **+0.4** |
| **Less Deadweight** | **0** |
| **NET EMPLOYMENT** | **+2.4** |

*Source: AECOM Final Evaluation 2013*

### 13.7 MEASURING ECONOMIC VALUE

Reflecting the activities of the jobs created it is possible to estimate the economic value of the project outputs in terms of contribution to Gross Value Added (GVA) per annum to the local economy.

The ONS publish data on GVA output for the combined areas of Rhondda Cynon Taff and Merthyr Tydfil representing the Central Valleys of Wales (NUTS 3 level). This is the smallest area for which information is available and is considered to be suitably representative of the local area. GVA data at industrial sector level is currently only available up to 2009. The GVA from new retail employment is embraced within a wider employment sector which includes: distribution, transport, food and accommodation services as shown in Table 13 below. At 2009, the sector supported some 22,500 jobs across RCT and Merthyr Tydfil (Central Valley – NUTS 3 area). This gives a GVA estimate per employee of around £28,000 in 2009.

**Table 13: GVA per employee (Central Valleys NUTS 3 area)**

| Business Sector | Total GVA Output 2009 | Total Jobs in Sector 2009 | GVA per employee |
|---|---|---|---|
| Distribution, transport, food & accommodation (includes retail services) | £629 m | 22,500 | £28,000 |

*Source: ONS GVA Output and Business Register & Employment Survey*

With 2.4 net jobs being created as a result of the town centre interventions, the economic value to the local economy is estimated to £67,200 per annum; **resulting in £550,000 Net Present Value (NVPV) of economic benefits.**

The Net Present Value (NPV) of the resulting economic benefits has been calculated over a 10 year time period reflecting the assumed duration and durability of benefits and using the Treasury Time-Preference Discount Rate of 3.5%. This is a cautious approach to avoid over-estimating the local impacts and is in accordance with the CLG guidance on "Valuing the Benefits of Regeneration" (Economics Paper 7, December 2010).

See Appendix 05 for NPV calculation tables.

### 13.8 PRIVATE SECTOR INVESTMENT

With a further £40,000 private investment leveraged through the Townscape Enhancement Programme (at current prices), the **total economic benefit to Ferndale is estimated to be around £590,000 NPV**.

### 13.9 IMPACT OF INCREASED FOOTFALL

The town centre healthcheck (Section 10) highlights the recent uplift in town centre footfall based on surveys up to April 2013. Weekly visitor numbers to Ferndale have increased to around 20,000 on average. The Ferndale Baseline report (August 2011) identified the potential "counterfactual" trend (i.e. without the project) with average weekly footfall dropping to around 15,000 per week. If the recent emerging trend is sustained this suggests an "improvement" of 5,000 additional visitors per week which might be attributed to the environmental enhancement of the town centre.

Translating this uplift in footfall to potential economic benefit to the town centre will depend on the purchase power captured from the increase in visitors. The RCT Retail Capacity Assessment (NLP March 2008) indicates local centres such as Ferndale may be capturing around 2% of local retail expenditure; reflecting the stronger competitive offer of larger centres elsewhere in RCT and outside the County Borough. Based on an average annual comparison retail expenditure of £2,200 (NLP March 2008), the 2% share to small local centres equates to £44.00 per annum; or £0.85 per week.

Applying this share of retail expenditure to the 5,000 additional weekly visitors to Ferndale suggests a potential uplift in available retail turnover of £4,250 per week; or around £220,000 per annum. Assuming duration of 10 years, **the NPV of the resulting additional local economic benefit is £1.99m.**

### 13.10 FUTURE ECONOMIC BENEFITS

The above estimates, of course, exclude any future potential benefit arising from improved profitability of town centre businesses and any future change to occupancy rates in the town centre as a result of improved confidence and activity in the town centre. The town centre improvements have only just been completed and the work coincides with a period of continued economic uncertainty in retail performance and low market confidence on a national basis let alone at a local Ferndale level. This has directly impacted on the private sector response and ability to take-up the planned Townscape Improvement Programme. Furthermore, town centre vacancy rates have actually increased to 13.5% from a previous low of 7.7% as a result of the continued background economic context.

Whilst there are some emerging signs of improved confidence with indications of increased local footfall and positive observations recorded from the Community Audit on the quality improvements to the town, the timing of this final evaluation study is too early to see the full effects of the town centre improvement which will take time to filter out to the general population and to benefit local businesses.

The on-going economic performance of the town should continue to be closely monitored and re-examined in 2015 (when the original work was due to complete) to properly assess the future impact.

### 13.11 SENSITIVITY & OPTIMISM BIAS

The limitations on available local GVA data means the above calculation assumes employment in Ferndale to be consistent with the wider NUTS 3 area of the rest of RCT and Merthyr Tydfil and to be in line with the average across a range of employment activities including transport, warehousing, retail, hotels and restaurants etc. Reflecting on these issues, therefore, it is considered prudent to allow for sensitivity and optimism bias in the resulting calculations.

Optimism bias is the term used to describe the tendency to be overly optimistic about project costs, duration and benefits (outputs and receipts/income). Government guidance recommends adjusting for Optimism Bias (CLG March 2007) to test how much benefits may fall short of expectations for the project to remain worthwhile. Standard practice typically allows for 20% discount on economic benefits to reflect the potential for Optimism Bias.

Adjusting for Optimism Bias in this way, would reduce the NPV of potential economic benefits to Ferndale to £2,064,000 over the ten year duration as shown in the table below.

**Table 14: Ferndale Economic Benefits**

| | **NPV Benefit** |
|---|---|
| Net Jobs – GVA benefit | £ 550,000 |
| Private Investment Levered In | £ 40,000 |
| Potential Visitor Spend Uplift | £1,990,000 |
| **Total Economic Benefit** | **£2,580,000** |
| Optimism Bias -20% | (£ 516,000) |
| **Net Economic Benefit** | **£2,064,000** |

*Source: AECOM Final Evaluation 2013*

# 14 VALUE FOR MONEY IMPACT

Testing the Value for Money impact of the regeneration project is determined by comparing the value of the economic benefits realised relative to the public investment required to achieve the identified outputs and outcomes. Consideration is also given to the overall relationship between: economy, efficiency and effectiveness of the public investment provided where:

- Economy is the value of the input required.
- Efficiency is the measure of productivity from the investment – e.g. cost per job created.
- Effectiveness is a way of reflecting the wider impact of the investment, both quantitative and qualitative.

## 14.1 PUBLIC INVESTMENT

The total public investment made in the regeneration of Ferndale was £2,265,748 and reflects the £60,000 reduction in the planned Townscape Enhancement Programme. Of this total, some £1,513,514 was European ERDF investment in the town centre.

## 14.2 BENEFIT COST RATIO – PRODUCTIVTY

The initial direct economic benefits identified from the regeneration programme arise from the £40,000 public sector investment in the single Townscape Enhancement project which was delivered in Ferndale. This created 2 new jobs in the town centre, levered in £40,000 of private sector matched funding and stimulated economic benefit of around £440,000 NPV (allowing for 20% Optimism Bias).

On its own, this indicates **a strong Benefit Cost Ratio (BCR) of 12.0** (i.e. £480,000 benefit/£40,000 costs). This is much better than the national benchmark leverage ratios of 6.00-10.00 from commercial property development (CLG Economics Note 7 December 2010) and indicates good value for money.

The **cost per job ratio at £20,000** can also be viewed as being very good (i.e. 2 jobs from £40,000 public investment) and is towards the low end of national benchmark indicators of £19,800-£48,800 (CLG Economics Note 7 December 2010).

However, the commitment from the private sector to proceed with the refurbishment project must also, to some degree, be attributed to the wider investment being made in the town centre environmental improvement; helping to boost local confidence. The total public sector investment of £2.27 million, therefore, has to be compared against the £2.064 million of total economic benefit identified as currently arising in Ferndale as a result of the town centre improvements. This current outcome provides a **much lower BCR of 0.91** but has to be viewed in the context of future potential economic benefit which may arise from Ferndale's improved competitive position.

**Table 15: Ferndale Value for Money**

| | NPV |
|---|---|
| Total Net Economic Benefit (incl OB) | £2,064,000 |
| Total Public Sector Investment | £2,265,748 |
| Net Economic Return on Investment | -£201,748 |
| **Benefit : Cost Ratio** | **0.91** |

*Source: AECOM Final Evaluation 2013*

If the project had delivered the original planned programme of Townscape Enhancement and created the anticipated 6 new jobs rather than just 2, then, for a relatively minor additional level of public investment (+£60,000), the project would have realised a considerably better return on total investment with a potential BCR approaching 1.2.

**Table 16: Predicted Outcome based on Targets**

| | NPV Benefit |
|---|---|
| Net Jobs x6 – GVA benefit | £1,390,500 |
| Private Investment Levered In | £ 100,000 |
| Potential Visitor Spend Uplift | £1,990,000 |
| **Total Economic Benefit** | **£3,480,500** |
| Optimism Bias -20% | (£ 696,100) |
| **Net Economic Benefit** | **£2,784,400** |
| Total Public Sector Investment* | £2,325,700 |
| Net Economic Return on Investment | £ 458,700 |
| **Benefit : Cost Ratio** | **1.2** |

*Source: AECOM Final Evaluation 2013*

**Note: this is adjusted public investment reflecting additional Townscape Enhancement works*

These outcomes, however, also need to be viewed in the context of the continued churn and change in the town centre as a result of the background effects of national economic uncertainty. Whilst there have been measurable benefits in the local economy these have, to date, been more than offset by the actual increase in vacancy rates during the period under review. These changes are not directly attributable to the regeneration plans but clearly part of wider economic concerns and local uncertainty.

### 14.3 EFFECTIVENESS

Notwithstanding the relatively low BCR as evidenced by the measurable economic benefits attributed to the project to date, the overall value for money has to be viewed in the wider context of local community improvements and other qualitative benefits which cannot be fully measured or formally valued in a cost-benefit analysis.

To this end, the project has achieved its stated ambitions and met the core policy objectives which laid out a strong rationale for local investment to support the local community of Ferndale. This has, therefore, been an effective use of public investment which has raised the quality of the town’s overall public realm and environment, improved visibility, access and permeability through enhanced way-finding and improvements to footpaths, routes and crossings etc and established a more competitive proposition to help attract new business investment in the future as the wider economic conditions improve whilst also improving future potential trading conditions for existing businesses in Ferndale.

# PART FOUR

## Conclusions & Recommendations

## 15 KEY FINDINGS

The key findings from this final evaluation of town centre regeneration in Ferndale include:

- The rationale for the regeneration of Ferndale has been supported by a strong national, regional and local policy context and evidenced in the Business Case (February 2010).
- The areas within Ferndale identified as in need of enhancement relate directly to the 'Future Ferndale: A Regeneration Strategy for Ferndale Town Centre'. These areas have thus been identified through a structured process of research and with extensive community consultation.
- The investment in public realm has changed the physical environment of the town very much for the better. All areas investigated improved their PES evaluation score (Pedestrian Environment Review System) and generally received positive feedback from the Community Street Audit completed as part of the evaluation study.
- No areas were rated RED in the final evaluation, compared with 4 in the Baseline assessment. Only 4 zones were rated AMBER compared with 9 in the Baseline and 10 zones were rated GREEN in the final evaluation compared with only 1 in the Baseline assessment.

- Lime Street walkway was singled out by the Community Street Audit attendees as one of the best improvements the regeneration scheme has brought to the town. See the Exemplar Case Study sheet in Appendix 06.
- Concerns were raised in the Community Street Audit about the need to refurbish the toilets in the town.
- The town centre healthcheck analysis, however, highlights a town which continues to evolve in response to market conditions. Although there may be some early indications of increasing footfall and attractiveness, the town has continued to lose a number of local businesses leading to a substantial increase in vacancy rate, despite changes elsewhere with new occupiers taking up previously vacant space. This is inevitable, however, given the current market constraints and uncertainty over town centre trading and it remains early days in respect of seeing the true impact and benefit of the townscape improvements.
- Despite best efforts, only one Townscape Enhancement Project has been delivered largely due to the constraint on private sector match funding. The one project has delivered anticipated outputs accommodating one new enterprise and creating 2 new local jobs but this is a third less than originally expected and projected for the project in the Business Case.
- Other objectives have been achieved with an emerging increase in footfall to the town centre now up to 25,000 per week, compared with a counterfactual expectation of holding steady around 15,000 per week.
- Ferndale also appears to be more accessible to local community with a significant reduction in number of visitors using the car; just 33% in 2012 compared over 40% in the baseline assessment. Some 56% of visitors surveyed in 2012 now come to town on foot.

- Town centre vacancy rates, however, have increased substantially, despite the on-going improvements to the town centre and are largely a reflection of the continued national financial and economic constraints and wider external factors. It is feasible that the full impact and benefit of the town centre improvement works have yet to be filter through to the wider community and market at large with this evaluation exercise being coterminous with the completion of the physical works. Further monitoring of the town centre performance will be necessary to establish if the ambitions for the town can be fully realised in the longer term.

- The direct economic benefits arising from the single Townscape Enhancement project which was delivered in Ferndale indicates **a strong Benefit Cost Ratio (BCR) of 12.0** (i.e. £480,000 benefit/£40,000 costs). This is much better than the national benchmark leverage ratios of 6.00-10.00 from commercial property development (CLG Economics Note 7 December 2010) and indicates good value for money.

- The **cost per job ratio at £20,000** can also be viewed as being very good (i.e. 2 jobs from £40,000 public investment) and is towards the low end of national benchmark indicators of £19,800-£48,800 (CLG Economics Note 7 December 2010).

- However, the commitment from the private sector to proceed with the refurbishment project must also, to some degree, be attributed to the wider investment being made in the town centre environmental improvement; helping to boost local confidence. The total public sector investment of £2.27 million, therefore, has to be compared against the £2.064 million of total economic benefit identified as currently arising in Ferndale as a result of the town centre improvements (see Table 14). This current outcome provides a **much lower BCR of 0.91** but has to be viewed in the context of future potential economic benefit which may arise from Ferndale's improved competitive position.

# 16 CRITICAL LESSONS

A number of key lessons have emerged from this evaluation exercise:

- Small town centres like Ferndale are increasingly exposed and sensitive to external market threats and pressures.

- Environmental improvements have a positive effect on existing communities who may already frequent the town centre but without parallel intervention to market and promote the changes delivered, wider communities will remain unaffected.

- The financial constraints on the private sector should have been anticipated from the outset and perhaps earlier consideration could have been given to increase the rate of intervention from 50:50 to 70:30 or even 75:25 as in other town centres.

- Despite physical improvement work being completed earlier than envisaged, the final evaluation should still have been delayed for two years to a point in time when the original objectives were expected to have been realised. This would have allowed for the inevitable time-lag between physical intervention and the potential market reaction to be fully measured and to allow some of the wider external market impacts to have reduced.

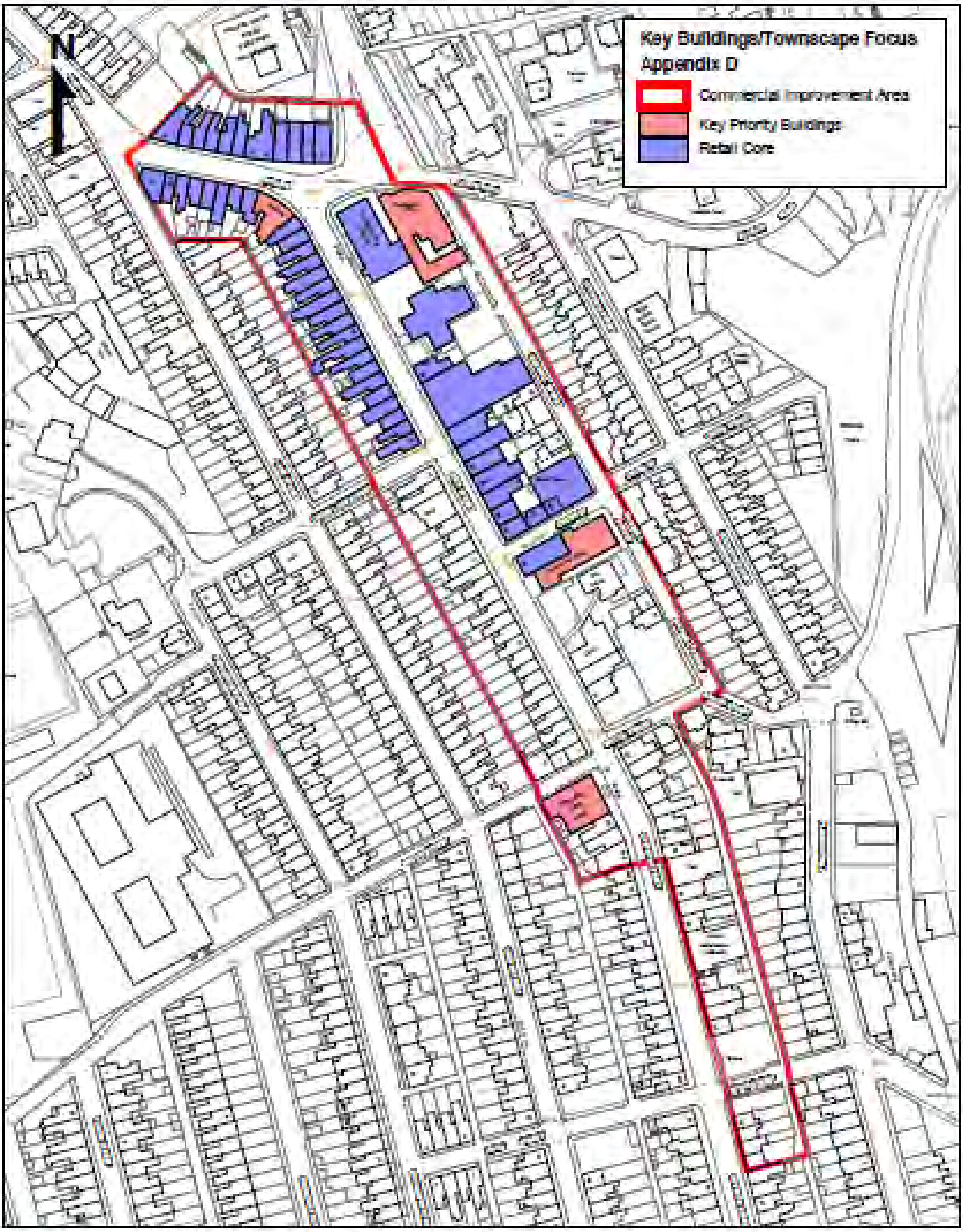
# Appendix 01

## Town Centre Regeneration Areas

**Green dots represent areas where regeneration work is being undertaken**

# Appendix 02

## Commercial Improvement Area Boundary




| | Key Buildings/ Townscape Focus | September 2009 | Not to Scale |
|---|---|---|---|
| RHONDDA CYNON TAF | Appendix D | | |
| | Ferndale | | |

# Appendix 03

# Theme Objectives and Activities

Promoting Equal Opportunities as part of Ferndale Town Centre Regeneration

| Objective | Potentially Relevant activity | Relevant activity in Ferndale |
|---|---|---|
| Increase the number of individuals who have multiple disadvantages accessing employment and self employment | - Improving the physical environment in which people live, fostering a feeling of well being | The proposals will revitalise Ferndale town centre, and will have a significant perception changing impact. The regeneration of Ferndale has been designed in a way so confidence is reinstalled in the town centre, creating a greater sense of opportunity for the deprived communities in the locality. All public realm works will be completed in a way that meets the aspirations of the Disability Wales 'streets ahead' initiative. |
| Increase the numbers of women, BME people and disabled people securing training and employment in higher paid and higher skilled sectors and self-employment | Support for projects which ensure sites and premises meet the needs of all their staff and customers e.g. safety and access issues<br><br>- Support for projects which aim to ensure safe and accessible transport solutions | - All commercial property improvements will be completed to ensure all statutory legislation is met, and premises are accessible to all members of the community. All works will be DDA Compliant. Applicants will be notified through terms and conditions of DDA requirements<br>- Public realm improvements at Darran Park will be designed to ensure they are accessible to all, and will try to be multi-sensory to ensure people with physical and learning disabilities can benefit from the space in multiple ways. Opportunities to utilise soft and hard landscaping that can be interpreted through touch, vision, and scent will be promoted.<br>Public realm improvements at transport nodes will be designed and enhanced to ensure they meet the full needs of all members of the community, through the use of elements such as raised curbs, and appropriate design for people that are visually impaired. Sustainable transport such as cycling will be encouraged, through provision of integrated services into the public realm.<br>- Disabled parking in the town will be increased to ensure optimum accessibility for disabled vehicle users |

| | | |
|---|---|---|
| Challenge occupational segregation by increasing the numbers of women and men training or retraining in non-traditional areas, focussing on areas whether there are skills shortages | - Support for facilities that address childcare needs, shops and leisure facilities | The regeneration of Ferndale town centre will strengthen the economic base of the town centre, ensuring it is more sustainable. This will ensure key services within the town centre are protected, and remain accessible for people in surrounding communities. |
| Consultation / involvement / participation of local groups and the opportunities to feed in comments and possibly influence the design of proposed activities | | All the activity within the Business Plan will be subject to comprehensive community consultation, with exhibitions and consultation exercises held to ensure maximum input from the wider community. Where community feedback identifies better and more appropriate ways in which projects can be delivered, the proposals will be changed accordingly. |
| Opportunities for local people / groups to participate in communities / management and design making process | | The activity relating to the Business Case (February 2010) will be discussed in detail at Ferndale Town Centre forum meetings, which encourages attendance from all stakeholders in the town centre. This offers an opportunity for local people and groups to participate in the decision making process. Additionally certain initiatives, such as public art projects will have an independent management process established to ensure the project is run by the wider community. |
| Accessibility of literature / publicity / information including font size and design, language, images, availability and targeting | | All literature and information associated with the project will be produced in a variety of formats upon request to ensure it is accessible to all. This will include bilingual materials, provision of large font, Braille, and audio formats. |
| Completion of a Equality Impact Assessment | | An Equality Impact Assessment will be completed, so that the impact of Ferndale Town Centre Regeneration on individuals and groups can be identified, and adverse impacts mitigated. |

Promoting Environmental Sustainability as part of Ferndale Town Centre Regeneration

| Objective | Potentially Relevant activity | Relevant activity in Ferndale |
|---|---|---|
| Reduce greenhouse gases / adapt to effects of climate change | - Minimise the flood risk of the site | Public realm schemes will be designed wherever possible to ensure Sustainable Urban Drainage Systems are incorporated ensuring drainage is dealt with in a sustainable manner. This will result in greater flood control. Where appropriate attenuation systems will be utilised. Wherever a scheme is proposed to take place in an area of high risk of flooding, work will be undertaken collaboratively with the Environment Agency, to ensure proposals minimise flood risk. |
| Efficient use of natural resources | - Increase use of local sustainable materials | - The designs for the phases of public realm propose to use materials from the locality, such as Blue Pennant Sandstone. Use of such materials will result in less embodied energy being spent as part of the construction process. |
| Promote biodiversity and sustainable land management | - No inappropriate development in protected areas<br><br>- Retain and promote on-site biodiversity as far as possible | - No inappropriate works will take place in any protected areas, such as AONB's, conservation areas, or within the curtilage of listed buildings.<br>The physical regeneration works will take place in areas of the town centre where it has been identified that there will be no disturbance to biodiversity. Improvements at the entrance to Darran Park will be carried out in an appropriate manner that ensures there is no loss or adverse implication to biodiversity. |
| Improve local built environment, access and biodiversity | Provide a pleasant public realm that complements the community | The regeneration of Ferndale town centre will result in a high quality public realm that portrays an excellent image of the locality. The exemplar quality will demonstrate what can be achieved in an extremely deprived area. The public realm will be designed to it is locally distinctive, and relates to the surrounding community. |

# Appendix 04

# 2012 Public Realm Audit Summary

| Links | I.D. | Effective Width | Dropped Kerbs | Gradient | Obstructions | Permeability | Legibility | Lighting | Tactile Information | Colour Contrast | Personal Security | Surface Quality | User Conflict | Quality of the Environment | Maintenance | Total Score (and % of Min/Max) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Beech Street (south side) | L1 | 10 | -6 | -2 | 3 | 3 | -1 | 3 | -9 | 9 | -5 | 9 | 15 | 2 | 3 | 34 (21%) |
| Cross Lake St (south) Frederick St to High St | L10 | -5 | 6 | -2 | 3 | 6 | -2 | 9 | 6 | 9 | 5 | 9 | 5 | 3 | 3 | 55 (34%) |
| High St (east) Strand to Brook St | L11 | 5 | 9 | 2 | -3 | -3 | -2 | 9 | 9 | 6 | 15 | 9 | -5 | 2 | 3 | 56 (35%) |
| High St (west) Strand to Brook St | L12 | 5 | -3 | 1 | -6 | 3 | -2 | 9 | 6 | 6 | 15 | 9 | -10 | 2 | 3 | 38 (24%) |
| Strand (south) Lake St to High St | L13 | 5 | 9 | 1 | 9 | 6 | -2 | 6 | 9 | 9 | 10 | 9 | 10 | 3 | 3 | 87 (54%) |
| Strand (north) Lake St to High St | L14 | 5 | 9 | 1 | 6 | 6 | -2 | 9 | 9 | 9 | 10 | 9 | 15 | 3 | 3 | 92 (58%) |
| Beech Street (north side) | L2 | 10 | -6 | -2 | 3 | 3 | -1 | 3 | -9 | 9 | -5 | 9 | 15 | 2 | 3 | 34 (21%) |
| Lime St (west) and Wood St (north) | L3 | 10 | 9 | 3 | 9 | 9 | -2 | 6 | 9 | 6 | 10 | 9 | 15 | 2 | 3 | 98 (61%) |
| Lime St (east) and Wood St (south) | L4 | 10 | 9 | 3 | 9 | 9 | -2 | -3 | 9 | 6 | 5 | 9 | 15 | 1 | 3 | 83 (52%) |
| Lake St (west), Wood St to Cross Lake St | L5 | 15 | 9 | 2 | 9 | 9 | -2 | 3 | 9 | 9 | 10 | 9 | 15 | 3 | 3 | 103 (64%) |
| Lake St (east), Strand to Cross Lake St | L6 | 15 | 9 | 2 | 9 | 9 | -2 | 3 | 9 | 9 | 15 | 9 | 15 | 3 | 3 | 108 (68%) |
| Cross Lake St (north) Darran Park to Fire Station | L7 | -10 | -3 | -3 | -3 | -3 | -2 | 3 | 6 | -3 | 5 | 9 | -5 | 3 | 3 | -3 (-2%) |
| Cross Lake St (south) Darran Park to Frederick St | L8 | +5 | -6 | -1 | 6 | 6 | -2 | 0 | 6 | -3 | 5 | 9 | 10 | 3 | 3 | 41 (26%) |
| Cross Lake St (north) Fire Station to High St | L9 | -5 | 6 | -2 | -3 | 6 | -2 | 9 | 6 | 9 | 5 | 9 | 5 | 3 | 3 | 43 (27%) |

| Crossings | I.D. | Crossing Provision | Deviation from the Desire Line | Performance | Capacity | Delay | Legibility | Legibility (Sensory Impaired People) | Dropped Kerbs | Gradient | Obstructions | Surface Quality | Maintenance | Total Score (and % of Min/Max) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Across High St at Brook St | C1 | 15 | 6 | 15 | 2 | 9 | 3 | 9 | 9 | 2 | 1 | 9 | 3 | 83 (69%) |
| Across High St at Co-operative | C2 | 15 | 9 | 10 | 1 | 9 | 2 | 9 | 6 | 2 | 1 | 9 | 3 | 76 (63%) |
| Across Strand at North Rd | C3 | 10 | 9 | 10 | 3 | 9 | -1 | 9 | 9 | 2 | 1 | 9 | -1 | 69 (58%) |
| Across Cross Lake St at High St | C4 | 5 | 6 | -10 | 1 | 6 | 1 | 6 | -3 | 2 | -1 | 6 | -1 | 18 (15%) |
| Across Cross St High St | C5 | 5 | 9 | -5 | 1 | 6 | 1 | 6 | 9 | 2 | 3 | 9 | 3 | 49 (41%) |
| Across Strand at High St junction | C6 | 15 | 9 | -15 | 3 | -3 | -2 | 6 | 9 | 3 | 3 | 9 | 3 | 40 (33%) |

| PT Waiting Areas | I.D. | Information to the Waiting Area | Infrastructure to the Waiting Area | Boarding Public Transport | Information at the Waiting Area | Safety Perceptions | Security Measures | Lighting | Quality of the Environment | Maintenance and Cleanliness | Waiting Area Comfort | Total Score (and % of Min/Max) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| High St (east) south of Cross St | PT1 | -6 | 6 | 10 | -9 | 5 | -5 | 9 | 2 | 3 | 3 | 18 (14%) |

| Public Spaces | I.D. | Moving in the Space | Interpreting the Space | Personal Safety | Feeling Comfortable | Sense of Place | Opportunity for Activity | Link Reviews | Crossing Reviews | Route Reviews | Public Trans. Waiting Area Reviews | Total Score (and % of Min/Max) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Darran Park | PS1 | 10 | -6 | -10 | 6 | 3 | 1 | 10 | 0 | 5 | 0 | 19 (12%) |
| Library - High Street | PS2 | 10 | 3 | 15 | -3 | 3 | -1 | 10 | 10 | 0 | 5 | 52 (33%) |
| 'The Anchor' Pub | PS3 | 5 | -6 | 10 | -3 | 6 | -1 | 10 | 15 | 0 | 0 | 36 (23%) |

| Routes | I.D. | Directness | Permeability | Road Safety | Personal Security | Legibility | Rest Points | Quality of the Environment | Link Reviews | Crossing Reviews | Total Score (and % of Min/Max) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| High Street to Darran Park via Cross Lake Street | R1 | -5 | 3 | 5 | -10 | 3 | -1 | 1 | 5 | 0 | 1 (1%) |
| High Street to Darran Park via Beech Street | R2 | -10 | 3 | 5 | -10 | 3 | -1 | 1 | 5 | 0 | -4 (-4%) |

# Appendix 05

## Net Present Value Calculations

**FERNDALE - VALUE FOR MONEY CALCULATIONS**

| | | | | | |
|---|---|---|---|---|---|
| Retail GVA | £28,000 | per job | Footfall Uplift | 5,000 | per week |
| Net Jobs | 2.4 | @ Dec 2012 | Retail Spend | £0.85 | @ 2% local centre |
| Gross Benefit | £67,200 | | Gross Benefit | £4,250.00 | per week |
| | | | Annual Benefit | £221,000.00 | 52 weeks |

| | | Gross Benefits | | Benefits NPV @3.5% | |
|---|---|---|---|---|---|
| **Year** | **Period** | **Jobs (2.4)** | **Footfall** | **Jobs (2.4)** | **Footfall** |
| 2011/12 | 0 | 0 | 0 | 0 | 0 |
| 2012/13 | 1 | 16,800 | 221,000 | 16,232 | 213,527 |
| 2013/14 | 2 | 67,200 | 221,000 | 62,732 | 206,306 |
| 2014/15 | 3 | 67,200 | 221,000 | 60,611 | 199,329 |
| 2015/16 | 4 | 67,200 | 221,000 | 58,561 | 192,589 |
| 2016/17 | 5 | 67,200 | 221,000 | 56,581 | 186,076 |
| 2017/18 | 6 | 67,200 | 221,000 | 54,667 | 179,784 |
| 2018/19 | 7 | 67,200 | 221,000 | 52,819 | 173,704 |
| 2019/20 | 8 | 67,200 | 221,000 | 51,032 | 167,830 |
| 2020/21 | 9 | 67,200 | 221,000 | 49,307 | 162,155 |
| 2021/22 | 10 | 67,200 | 221,000 | 47,639 | 156,671 |
| 2022/23 | 11 | 67,200 | 221,000 | 46,028 | 151,373 |
| 2023/24 | 12 | - | - | - | - |
| **Totals** | | **688,800** | **2,431,000** | **556,209** | **1,989,343** |

**FERNDALE - TARGET NUMBER OF JOBS**

| | | |
|---|---|---|
| Retail GVA | £28,000 | per job |
| Net Jobs | 6 | @ Dec 2012 |
| Gross Benefit | £168,000 | |

| FERNDALE | | Gross Benefits | | Benefits NPV @3.5% | |
|---|---|---|---|---|---|
| | | **Jobs (6)** | **Jobs (6)** | | |
| 2011/12 | 0 | 0 | | | |
| 2012/13 | 1 | £42,000.00 | | 40,580 | |
| 2013/14 | 2 | £168,000 | | 156,830 | |
| 2014/15 | 3 | £168,000 | | 151,526 | |
| 2015/16 | 4 | £168,000 | | 146,402 | |
| 2016/17 | 5 | £168,000 | | 141,451 | |
| 2017/18 | 6 | £168,000 | | 136,668 | |
| 2018/19 | 7 | £168,000 | | 132,046 | |
| 2019/20 | 8 | £168,000 | | 127,581 | |
| 2020/21 | 9 | £168,000 | | 123,267 | |
| 2021/22 | 10 | £168,000 | | 119,098 | |
| 2022/23 | 11 | £168,000 | | 115,071 | |
| 2023/24 | 12 | - | | - | |
| Totals | | £ 1,722,000 | | £ 1,390,521 | |

*Source: AECOM Analysis 2013*

# Appendix 06

## Exemplary Case Study

# Ferndale Town Centre Regeneration

Good Practice Case Study

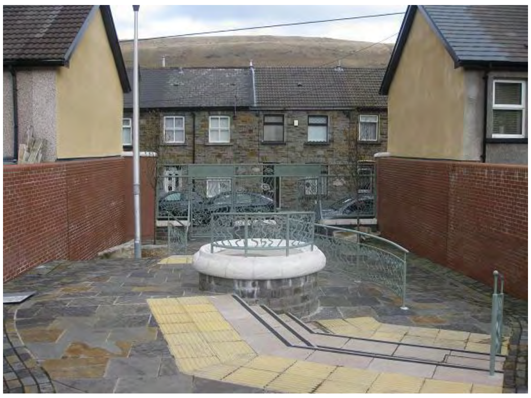
Final Evaluation May 2013

| **Project Name** | **Lime Street Walkway** |
|---|---|

## Project Description/Location Plan

***Creation of Lime Street/Lake Street Pedestrian Walkway*** –
The walkway was installed to increase accessibility between the already regenerated Lime Street car park and the town centre. The walkway passes through a now demolished fire station, which stood between the car park and the town centre.

## Before & After Photos



## Rationale – Aims & Objectives

This project maximised the opportunities created by a previously completed project, where a high quality and high capacity new car park was created for the town. Lime street car park provides adequate parking provision for users of Ferndale town centre, and was under-utilised, due to the perceived distance between the car park, and Ferndale's High Street. A need was identified to increase linkages between the main car park for the town, and the High Street through creation of a pedestrian walkway, which would improve permeability and access within the town. The creation of a high quality public walkway, achieved the aforementioned objectives. A public realm enhancement was created, utilising local materials, particularly Pennant Sandstone. Bespoke fabricated gates have been constructed at either end of the pedestrian walkway, incorporating distinctive artistic design appropriate to the area. At the centre of the site community artwork has been installed in the form of a 3D model village, depicting what Ferndale means to residents, created by local school children and an appointed artist. The proposed footpath from Lime Street car park to Cross Lake Street will further enhance access to the town centre and Darran Park consolidating the role of the car park and its entrances, maximising its impact.

## Project Delivery – Core Team & Skills Deployed

The space was design my Mike Haire a local landscape architect (**HAIRE LANDSCAPE CONSULTANTS)**

Construction works were undertaken by ERH Communications, utilising local specialist paving subcontractors Colin Richardson Contractors

The bespoke gates and model village were designed by artist Tim Clapcott following a number a workshops utilising local primary school children and the local arts factory.

## Project Outcomes

Outputs:

| | |
|---|---|
| Hectares of land developed | 0.0252 |

This area was singled out in the Community Audit as one of the best improvements the regeneration scheme has achieved in the town centre. The sculpture in the centre of the walkway was identified as a particularly welcome addition to the town, especially as it was designed and made in collaboration between the artist and local primary school children.

Anecdotally people appear to be using the car park more often and walking through the linkway.

Engagement with Local schools has led to Community ownership, no vandalism to date in the area.

## Key Lessons/Issues Arising

This project maximised the opportunities created by a previously completed project, where a high quality and high capacity new car park was created for the town. Lime street car park provides adequate parking provision for users of Ferndale town centre, and was under-utilised, due to the perceived distance between the car park, and Ferndale's High Street. A need was identified to increase linkages between the main car park for the town, and the High Street through creation of a pedestrian walkway, which would improve permeability and access within the town.

The walkway was noted for its lack of vandalism, although it was suggested that this was because the gates to the walkway were locked at night. Whilst this stopped vandalism it also stopped people from using the walkway in the evenings.

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