



Rhondda Cynon Taf Town Centre Regeneration Evaluation

Pontypridd - Interim Report

May 2013



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1. INTRODUCTION

Regeneration of the town centres of Pontypridd, Aberdare and Ferndale 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) has been 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 involves three key stages and will be run over a four year period as the regeneration work is completed as follows:

- | | | |
|-------------------------------|---|-----------------|
| ✓ Stage 1 Baseline Studies | - | 2011 (Complete) |
| ✓ Stage 2 Interim Evaluations | - | 2012/13 |
| ✓ Stage 3 Final Evaluations | - | 2014/15 |

This report is the **Interim Evaluation for Pontypridd**. A separate report has also been prepared for Aberdare and a Final Evaluation Report has been prepared for Ferndale which has been brought forward due to the earlier completion of the town centre improvements. The report documents the current conditions in the town centre and evaluates progress in relation to programme aims and objectives. The reports also detail the mid-term conditions in respect of town centre performance, health, vibrancy and vitality with particular reference to commercial market conditions as the national economy emerges out of recession. Further evaluation analysis is provided through a comparison of the towns against baseline conditions and comparator town performances.

Regeneration activity in Pontypridd has two distinct dimensions: **public realm enhancement** and **Townscape Enhancement Programme (TEP)**.

Public Realm enhancements are planned to regenerate the commercial areas of:

- Taff Street and High Street – the Primary Core
- Market Street, Church Street and Mill Street – the Secondary Core

The **Townscape Enhancement Programme** will work to deliver improvements to the fabric of properties and the townscape within the commercial core of Pontypridd. Grants have been made available to property owners and tenants for renovation and improvement works to the frontage and envelope of buildings at a ratio of 70:30, public sector to private sector investment.

PART ONE

Project Progress

2. OVERVIEW OF PROJECTS & OUTPUTS

The public realm enhancements for Pontypridd are designed to:

- Establish a clear hierarchy of streets and spaces.
- Ensure the enhancements of streets and spaces support their desired function and character.
- Make the core business and retail area of Pontypridd an accessible environment for all.
- Create a unified, uncluttered high quality public realm.
- Encourage activities and interaction throughout the day and evening.
- Achieve a clean, well maintained safe and sustainable environment.

The priority areas identified for investment are:

Primary Core Streets – Taff Street, High Street – Taff Street and High Street are recognised as the main commercial area of Pontypridd. Public realm enhancements aim to reinforce these strengths by improving vehicle and pedestrian movements and the quality of public spaces through the use of high quality paving and a simple unified, wide footpath the streets will encourage pedestrians over cars. Vehicle access has already been restricted between 11am and 4pm through a permanent traffic order in 2009.

Primary Core Streets Interim Progress

Progress along the Primary Core Streets is on schedule.

- Development works along High Street have been substantially completed. Pavements have been re-paved and the carriageway has been re-surfaced.
- Development works along Taff Street have progressed significantly but are not yet complete. In order to create minimum disruption to the town centre developments have been undertaken in stages, which has led to what looks like a patchwork of new landscaping and old landscaping.
- At the time of the AECOM site visit, there were some active construction sites along Taff Street. Overall the Primary Core Streets are on track for their scheduled completion.

Secondary Core Street – Market Street, Church Street, Mill Street – Market Street, Church Street and Mill Street constitute the remainder of Pontypridd's commercial centre. The streets run off Taff Street and High Street and give character to the centre of town. Public realm enhancements will again focus on improving the environment in a way that encourages pedestrians. Pavements will be widened, kerbs will be lowered and the carriageway will be narrow. The perception will be of a much more user friendly space, giving room for market stalls and cafe seating as well as greater pedestrian priority.

Secondary Core Streets Interim Progress:

Progress along the Secondary Core Streets is on schedule:

- Development works along Church Street have been completed.
- Development around Mill Street is still on-going and is proving quite disruptive for pedestrians using the town centre (see photo in Table 01 below)
- Developments along Market Street are also on-going but development here is less disruptive due to the lower levels of pedestrian movements.

Complementing the public realm works above is a programme to support improvements to key buildings in the town as follows:

Townscape Enhancement Programme– Grants have been made available to property owners for renovation and improvement works to the frontage and envelope of buildings at a ratio of 70:30, public sector to private sector investment. All businesses operating in the Commercial Improvement Area boundary (see Appendix 02) have been eligible for Townscape grant funding.

A total of £10.5 million is planned to be invested in the public realm and townscape improvement in Pontypridd, including the private sector contribution to the property improvements.

Townscape Enhancement Programme Interim Progress:

Allocation of funding for the Townscape Enhancement Programme has now been completed. To date 280 sq m of premises have been Created or Refurbished through the Townscape Enhancement Programme. A further 336 sq m has been forecast for completion by the end of the programme based on the dimensions of properties that have been allocated TEP funding.

As of July 2012 £330,921 has been committed to the six approved TEP schemes. As a consequence of the 70:30 public sector to private sector funding split this has leveraged £145,601 of private sector funding. The remaining £369,079 of public sector funding available for TEP has been allocated, or is set to be allocated, but not yet spent.

Wider Projects – This investment is not happening in isolation, however, and a wide range of other projects are also planned for delivery, all of which will contribute to the long term ambitions of regenerating Pontypridd. A number of additional projects have been completed in the past year, including the opening of a new Sainsbury's store on the Brown Lenox site outside Pontypridd in the summer of 2012 and highway improvements including a new bus lane. Revamping of the Lido has recently been confirmed to receive £2.3 million of funding from HLF.

Unfortunately, the company behind the planned redevelopment of Taff Vale Shopping Centre has gone into liquidation; although the site was demolished ready for development. The current position is that agents have been appointed on behalf of the receiver and are actively seeking expressions of interest from potential occupiers to try and re-start the scheme which will need to be monitored very closely over the next few months.




3. PROGRESS AGAINST AIMS AND OBJECTIVES




This section of the report evaluates regeneration progress against the actual achievements of the project. Progress against key aims and objectives has been assessed through site visits, document reviews and validation of project files.

PHYSICAL DEVELOPMENTS

Priority sites identified for regeneration and development progress at the date of the site visit on September 3rd, 2012, are presented in the table below. Through site visits undertaken by AECOM the progress of physical developments has been documented through photographic evidence and site observations.

Table 01: Progress of Physical Developments

Priority Site	Site Visit Observations	Photographic Evidence
Taff Street	This part of the town evidently attracts high level of pedestrians and can become crowded at peak time. Regeneration works have caused some disruption to the town centre. Works in this area were still under construction at the time of the site visit.	
High Street	Amendments to high street had been completed at the time of the site visit and street furniture is being well used.	
Market Street	Market street was undergoing significant physical change at the time of the site visit. This was causing significant but unavoidable disruption to this area of the town centre.	

Church Street	Regeneration along Church Street had been completed at the time of the site visit. However, the connection to Market Street needs to be completed.	
Mill Street	Mill Street was experiencing significant disruption at the time of the site. Pedestrians were being channelled down a narrow path to one side of the regeneration area and this was causing some conflict as pedestrians were moving in both directions whilst there was only really enough room for pedestrian flows in one direction.	
Townscape Enhancement Programme	A number of retail units in the town have been allocated funding for refurbishment and enhancement of their facades. At the time of the site visit not all units had received funding. The picture is of one shop that has recently received investment.	

INTERIM OUTPUTS

The table below presents a summary of progress towards targets as at September 2012. Evidence of progress is provided in the text below the table. As at September 2012 the physical regeneration of Pontypridd was on schedule.

Table 02: ERDF and Additional Output Programme Targets and Progress at September 2012

Indicator	Business Case Regeneration Targets	Interim Progress (September 2012)		
ERDF				
Land Developed	1.23ha	0.397ha		
Physical Improvement Schemes	1	0%		
Premises Created or Refurbished	1,300 m ² (10 premises)	280 m ² (2 premises) (21.5%)		
Enterprises Accommodated	10	4 (40%)		
Jobs Accommodated	20	14*		
Gross Jobs Created	20	6 (30%)		
Additional Outputs				
	Baseline	Original Target	Revised Target	Interim Progress (September 2012)
Reduction in Vacant Properties	12% <i>(Source: RCT Spatial Planning Team, 2009)</i>	8%	Below 12%	10.7%
Increase in Footfall	215,000 per month <i>(Source: Business Case, July 2010)</i>	+5% Increase above RCT Trend	Maintain footfall average above 200,000 per month	185,803 per month (average for first nine months of 2012)
Reduction in Commercial Yield Rates	7.75% <i>(Source: Business Case, July 2010 – Confirmed by Robert Chapman Associates)</i>	7%	7.75%	8.0% - 9.0% (estimated range)
Improvement in Public Perception of Town Centre	65% believe the Town Centre to be ‘Poor’ <i>(AECOM Shopper Survey, March 2011)</i>	50% improvement	33% believe the Town Centre to be ‘Poor’	Not Measured in Mid-Term Evaluation
Increase in Zone A Rental Rates	£50-£60 per square foot <i>(Source: Business Case, July 2010 – Confirmed by Robert Chapman Associates)</i>	£60-£70 per square foot	£50-£60 per square foot	£35-£40 per square foot
Reduction in Car Journeys to Pontypridd (and Increase in Sustainable Transport)	41% visit by car <i>(AECOM Shopper Survey, March 2011)</i>	59%	4% reduction in car journeys	Not Measured in Mid-Term Evaluation

Source: AECOM and Pontypridd Business Case, July 2010

*Note: WEFO approved methodology has changed since the original target was set – see text below

PROGRESS EXPLAINED

Land Developed

At scheme completion the regeneration of Pontypridd was anticipated to cover an area of 2.05ha in the Baseline Report (October 2011). Since the beginning of the scheme there have been a number of changes to the retail centre of the town and it has now been decided (with the consent of WEFO) to exclude Taff Vale shopping centre from the original scheme area. As a consequence the revised scheme boundary will cover an area of 1.23ha.

As at September 2012 the regeneration of Pontypridd had covered an area of 0.397 ha, which is 32% of the proposed area the scheme will cover if completed in-line with revised design proposals.

Areas of the town that have been regenerated include the:

- Area made up of works completed on Mill Street and Penuel Lane (0.1225ha)
- Area made up of works completed on Church Street, High Street and Taff Street (0.1363ha)
- Area made up of works completed on Church Street, Market Street and Taff Street (0.1382ha)

Calculating the area of land regenerated has been done by RCT County Borough Council using Planweb, a software tool used to accurately derive spatial areas.

Physical Improvement Scheme

The completion of the total suite of proposed developments in Pontypridd constitutes 1 physical improvement scheme. Consequently this target measure and output can only be achieved at the completion of the whole scheme. Therefore, 0% of this target has yet been completed although significant progress has been made towards the different elements of the Physical Improvement Scheme.

Premises Created or Refurbished

At project completion 800 sq m of existing floorspace is proposed to be refurbished across 10 units. In addition to this a further 500 sq m of additional floorspace is proposed to be created across the 10 units. In total, therefore, 1,300 sq m of floorspace is proposed to be 'created or refurbished', which averages at 80 sq m refurbished and 50 sq m created per each unit.

As at September 2012 two premises had been included in the project, which together total 280 sq m 'created or refurbished'. Proportionally this represents 21.5% of the total floorspace target and 20% of the unit target (of refurbishing 10 units). This would suggest that almost 80% of the outputs associated with this target are still to be completed.

Of the 280 sq m 'created or refurbished' all of it can be classed as refurbished.

The budget set aside for achieving this output has had over 50% committed. Nine properties have been approved to date, and approximately 15 are anticipated by the end of the project. The target for premises created or refurbished is scheduled to be achieved.

Through achieving this output it was hoped that private sector investment could be leveraged to the sum of £300,000. Due to the success in progress towards this target it is likely that £500,000 of private sector investment will be leveraged by programme end.

Enterprise Accommodation

At project completion 10 enterprises are proposed to be accommodated within the newly created or refurbished premises.

As at September 2012 four enterprises had been accommodated across two properties:

- One refurbished property has been occupied by the political party Plaid Cymru.
- The second property has been refurbished across three floors and has been occupied by three individual enterprises – a beauty salon, opticians and an optical glazing company.

Jobs Accommodated

The original Business Case estimated the number of jobs likely to be accommodated on the basis of c2 jobs per enterprise. With the proposal to accommodate 10 new enterprises, the original target assumed 20 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; although the original target calculation has not been revised.

WEFO provide the following definition for *Jobs Accommodated* indicator:

‘Number of jobs accommodated within the sites and premises referred to in the indicators “Premises Created or Refurbished”.

Accommodated: The maximum number potentially located at any one time. This is not the number accommodated over the life of the premises.’

The WEFO indicator definition does not provide any guidance as to whether the employment density multiplier should be applied to gross or net floorspace. However, Homes and Community Agency ‘Employment Density Guidance 2010’ suggests that for the retail sector an employment density multiplier of 19 sq m should be applied to the net internal area. For retail, the useable employment floorspace (or net internal area) is usually assumed to be 80% of total floorspace (or gross internal area). The 20% of floorspace that is deducted from gross floorspace to make net floorspace accounts for toilets, hallways, kitchens and other space that will not accommodate employment.

To properly evaluate progress, the estimate of the “achieved” outcome should be compared against the “target” on a consistent basis. Whilst WEFO have not formally revised the original target we set out below the implications of the revised methodology.

If the revised employment density indicator is applied to the total 1,300 sq m gross floorspace, then the regeneration proposals should, in theory, accommodate up to 65 new jobs, rather than the current “target” of 20 jobs.

However, if applied to the net floorspace ($1,300 \times 80\% = 1,040$) then at 1:20 sq m, the regeneration proposals could accommodate around 52 new jobs, rather than the current “target” of 20 jobs.

As at September 2012, 280 sq m of gross internal floorspace has been created or refurbished this means that either:

- 14 jobs have been accommodated ($280 \text{ sq m} / 20 \text{ sq m}$); or
- 11 jobs have been accommodated ($(280 \text{ sq m} \times 80\%) / 20 \text{ sq m}$)

Either approach equates to around 21.5% of the total expected jobs to be accommodated on the consistent basis using the revised methodology.

Gross Jobs Created

At project completion 20 jobs are forecast to have been created within the newly accommodated enterprises. WEFO guidance on how to capture "Gross Jobs Created" is reproduced below:

'A new permanent post, i.e. there is a reasonable belief that the post has no finite life-time: that it is not of fixed duration. The post itself should be counted, not an estimate of the number of people that may occupy the post over time. A seasonal job may also be counted, so long as the job is expected to recur indefinitely...Jobs should be reported as Full Time Equivalents (FTE), based on a 30 hour week.'

As at September 2012, six jobs have been created through the accommodation of enterprises in created or refurbished premises. Each job has been identified and verified through interrogation of each enterprise's payroll during monitoring visits every six months. A number of other jobs are also known to have been created but as yet there is not enough evidence for these to count towards the target.

Reduction in Vacant Properties

The measure of vacant properties has been undertaken by the AECOM evaluation team. As at October 2012, 10.7% of retail units in Pontypridd were identified as vacant. This represents an improvement on the Baseline scenario which identified 12% of retail units as vacant. Indeed, earlier surveys by RCT themselves indicated a much improved vacancy rate of just 6% recorded in 2011.

Increase in Footfall

RCT have set a target of arresting the decline in footfall and maintaining average footfall volumes of over 200,000 each month. For the first nine months of 2012, the average monthly footfall count was 185,803; which is only some 14,200 (7%) below target. This is also at a time of significant disruption whilst the improvement works were underway. Furthermore, monthly footfall rates in July and August were above 200,000 and in September the footfall count reached a peak of 264,038 which bodes well for the future.

Reduction in Commercial Yield Rates

No formal investment sales have been recorded in Pontypridd of late and the market outside prime town centres remains very sluggish. Reflecting changes in rental performance and the constraints on funds, commercial market investment yields in Pontypridd are estimated to have softened further to around 8-9%

Increase in Zone A Rental Rates

Whilst there has been movement in occupiers in Pontypridd, the retail market continues to be highly variable and uncertain. Rental deals are currently being struck simply to remove the landlord burden of empty property rates and on relatively short-term agreements. Market rents remain under significant pressure, nationally, and are estimated to have reduced further in the last 12 months or so to around £35-£40 Zone A for prime sites in Pontypridd.

PART TWO

Current Conditions

4. COMMERCIAL PROPERTY MARKET REVIEW

Notwithstanding the 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. Rents are now some 40% adrift of the 2007 peak with very little prospect for immediate improvement.

Whilst there has been some movement in property occupiers in Pontypridd, it appears to be very much a case of “shuffling the pack” as operators trade-up or down within the town centre. Many existing occupiers may also appear “transitional” with several discount/closing down sales in evidence in the town centre at present.

Discussion with active local agents highlights their concerns that aesthetic improvements alone “have not / will not” make any difference when (i) there is poor demand (especially for units between 800 sq ft – 2,000 sq ft); (ii) out of town retail affords easier access and greater convenience; and (iii) there are extant Council car park and rates management policies which are detrimental to nurturing footfall and demand. Indeed, one agent described the situation in Pontypridd as ‘dire’ whereas another one made reference to ‘rubbish demand’.

Nevertheless, there has been movement and emerging signs of local take-up activity within Pontypridd. For example, the ex-Santander unit (with 839 sq ft ground floor sales) after some time has finally been put under offer to a local coffee operator, although understood to be at a rent of 50% of what it was. 96 Taff Street has also just been put under offer to a nail-bar operator, after 4 years on the open market. Since the baseline analysis, Tesco have opened a metro unit in the town centre which appears to be trading well, Centric Training & Recruitment has occupied a long-term vacant unit on 6/7 High Street and Lloyds Chemist has occupied another prominent vacant unit in the former Optic Shop on Penuel Square.

One agent has also talked about his client’s intention to refurbish / redevelop units 56, 57 and 58 Taff Street because of ‘significant interest’ as a result of the failure of the Taff Vale Centre. In other words, his client was a potential beneficiary of displaced or relocating occupiers. The same agent observed that as regards the Taff Vale project, it would be a long while before demand picks up again. Although there is emerging evidence of operator interest with planning applications recently being submitted by Costa Coffee taking on the former Clinton Cards unit and Greggs are proposing to move into a larger unit on Taff Street.

Notwithstanding this, overall vacancy rates in Pontypridd remain below the UK average and a number of units have secured new tenants relatively quickly after losing longstanding tenants through the downturn.

Turning to commercial market indicators, agents have been both coy and reticent in providing transactional data. Our surmise is that this is because it is so poor. One agent has attempted to sell a ten year lease investment (93/94 Taff Street) let to The Principality Building Society at a net initial yield of 6% resulting in **nil** interest. In reality, he has been too bullish. Prime yields are all about prime location (footfall for retail), the length of lease (10 years plus, and a strong covenant) and the form of lease (a full repairing ‘institutional’ style lease). Prime yields fall off dramatically a very short distance off absolute prime.

The table below reveals our research on prime yields. As a reflection of the market, they have moved out to 8-9%. Also, another factor to bear in mind is that to achieve a prime letting may necessitate an incentive of between nine to twelve months.

Table 03: Rents and Yields Pontypridd - 2012

	<u>Zone A pre- recession (PR)</u>	<u>Zone A – 2011</u>	<u>Zone A 2012</u>	<u>Prime yield</u>		
				<u>PR</u>	<u>2011</u>	<u>2012</u>
<u>Pontypridd</u>	£70.00	£40-45	£35 - £40	7.5 – 8.75%	7.75%	8.00- 9.00%

Source: Robert Chapman & Company 2012

Trader Perspective

Although not intended as a scientific or representative audit of trader views, a number of individual traders expressed their views during our site visits. For many, there was a general feeling of pessimism. One trader suggested that ‘everything is closing down’ whereas another said ‘it’s very quiet andPontypridd....has really gone downhill’. This is in sharp contrast to the experience of another local trader who has seen business “treble” since moving into the town centre taking on a unit previously run by a national trader following a refurbishment programme.

Other traders were concerned that the town centre improvement works were too little, too late. In fact, perversely, time and time again retailers talked about the ‘extremely damaging’ **impact of the ‘works’**, describing it as: a real nuisance; an impediment to people coming into Town – especially the older generation; a significant distraction which was not making a difference”. However, this is in contrast to the evidence from the town centre footfall counts which show a marked increase in visitors over the previous 12 months. RCT should be encouraged by this but clearly need to publicise this trend more widely to the businesses operating in the town centre.

5. TOWN CENTRE HEALTHCHECK

This section of the report provides an update and comparison of the town centre health check completed in the baseline assessment. 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.

RETAIL RANKINGS

At the time of the baseline study Pontypridd Town Centre was ranked 20th out of 105 retail centres in Wales (Javelin Venuescore 2010). Between 2007 and 2010 Pontypridd had fallen down the retail rankings by seven places from 13 to 20. This is based on the National UK-wide retail rankings where Pontypridd was ranked 447th out of 2,106 UK Centres.

The latest available town centre retail rankings data is for the year 2011 (Javelin Venuescore, 2011). Pontypridd is now ranked 22nd out of 127 retail centres in Wales, which represents a fall of a further two rankings in the year between 2010 and 2011. Compared against all UK retail centres Pontypridd is ranked 500th; a fall of 53 places on its UK ranking in 2010.

The national retail rankings are a useful litmus test of the relative retail offer of different centres. However, they tend to be rather less relevant to smaller (lower-order) centres such as Pontypridd as they are strongly influenced by the size of the retail floorspace offer and presence of national multiples and major destination anchor stores. The 2011 Rankings also now include major destination foodstores where they are integral to the defined town centre area, with the major operators being scored more highly.

Pontypridd has fallen down the retail ranking relative to other retail centres in Wales and centres across the UK as a whole. New investment in Carmarthen town centre has pushed the town up 3 places into the top 5 town centres in Wales in 2011. Expansion in out of town shopping centres such as Parc Trostre near Llanelli jumping 10 places between 2010 and 2011 has also compressed the relative performance of Pontypridd, allied with the loss of retail floorspace in the town following the demolition of the Taff Vale shopping centre.

Going forward, the priority for the Pontypridd town centre is very much the same as it was in the Baseline assessment. Pontypridd may not see significant strides up the UK retail rankings of shopping centres but it needs to consolidate its performance in the local (Valleys) and regional (Wales) context and reduce the towns retail decline. It will be especially important to ensure the local retail offer across Pontypridd is relevant and becomes more attractive to existing and new residents under the strategic growth plans in order to reduce current “leakage” of retail expenditure from the local area and reduce the need to travel further afield.

Table 04: Retail Rankings – UK and Wales

own	UK Rank 2011	Wales Rank 2011	Wales Rank 2010	Wales Rank Change
Cardiff	10	1	1	0
Swansea	75	2	2	0
Wrexham	105	3	3	0
Newport (Gwent)	165	4	4	0
Carmarthen	199	5	8	3
Cardiff (Roath)	222	6	9	3
Llandudno	226	7	6	-1
Cwmbran	231	8	5	-3
Rhyl	231	9	7	-2
Bangor	282	10	13	3
Merthyr Tydfil	288	11	15	4
Bridgend	300	12	10	-2
Llanelli (Trostre)	317	13	23	10
Neath	317	13	11	-2
Llanelli	343	15	14	-1
Haverfordwest	361	16	15	-1
Bridgend (Bridgend Designer Outlet)	365	17	12	-5
Barry	396	18	19	1
Aberystwyth	442	19	18	-1
Abergavenny	456	20	17	-3
Port Talbot	485	21	21	0
Pontypridd	500	22	20	-2
Monmouth	527	23	24	1
Caerphilly	559	24	26	2
Swansea (Fforestfach)	559	24	22	-2
Newtown	572	26	40	14
Colwyn Bay	583	27	24	-3
Ebbw Vale	583	27	30	3
Swansea (Morriston)	583	27	33	6
Chester (Broughton S P)	592	30	n/a	n/a
Cardiff (Canton)	608	31	27	-4
Cardiff (Cardiff Bay R P)	615	32	27	-5
Llantrisant (Talbot Green)	615	32	44	12
Caernarfon, Centre	649	34	29	-5
Newport (Gwent) (Newport R P)	649	34	30	-4
Aberdare	681	36	34	-2
Bridgend (Bridgend R P)	737	37	41	4
Ammanford	760	38	44	6
Mold	760	38	33	-5

Source: AECOM using Javelin Venuescore National Retail Rankings 2011

FLOORSPACE MIX

The Baseline assessment presented evidence from the Experian Goad Survey of 2009. Since then, the Taff Vale shopping centre has been demolished reducing the total number of shop units in the town centre from 199 to 178 recorded in the table below as at 2012.

Table 05: Town Centre Retail Units

	Pontypridd				National	National[†]
	2009*		2012**		2009	2012
	Units	% Units	Units	% Units	% Units	% Units
Comparison	91	45.7	69	38.8	41.9	41.4
Convenience	18	9.1	12	6.7	9.4	8.8
Retail Service Hairdressers & Travel Agents	20	10.1	26	14.6	10.4	9.8
Leisure Service Bars & Cafes	22	11.1	30	16.9	15.7	15.9
Business Service Banks/Estate Agents	16	8.0	22	12.4	8.6	8.5
Vacancies	27	13.6	19	10.7	12.8	13.6
Miscellaneous	5	2.5	0	0.0	1.2	2.3
TOTALS	199	100	178	100	100	100

*Experian Goad Town Centre Survey 2009, **AECOM site visit 2012 and

†Experian Goad Town Centre Survey 2012

Data on retail unit uses in 2012 were assessed through AECOM evaluation team site visits. From site visits it is estimated that just fewer than 39% of outlets in Pontypridd are occupied by comparison (non-food) retailers and 6.7% of retail units are occupied by convenience (local food) retailers. On the face of it this suggests a relatively poor retail offer in terms of durable goods and in-town food as both are underrepresented compared to the UK experience, 41.4% and 8.8% respectively and both have declined substantially from the time of the GOAD survey in 2009.

Whilst the proportion of retail units dedicated to comparison retail is below the national average, the overall dominance of comparison shopping in Pontypridd is in-line with national trends and will be the main draw for town centre retail visitors. Within the town centre offer, however, the range of Leisure Services (16.9%) has risen and is now in-line with the national average. Retail Service provision has also increased substantially (14.6%) and is now significantly above the national average town centre offer (9.8%).

Business Services is another large occupier of town centre units in Pontypridd at 12.4% of the total which is now above the national average of 8.5%.

Since 2009 the proportion of stores that are comparison retail has fallen by almost 7% points, similarly the proportion of units occupied by convenience stores has fallen by almost 3% points. Contrary to this, the proportion of retail units used for business services has increased from 8% to 12.4%, leisure services has increased from 11.1% to 16.9% and retail services has increased from 10.1% to 14.6%.

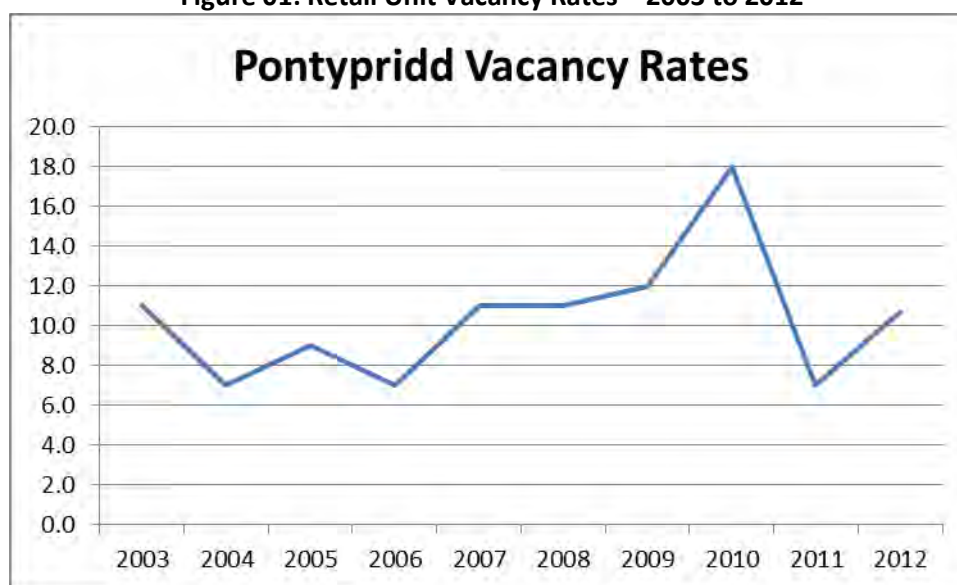
The general trend in Pontypridd appears to be relatively positive. Whilst Comparison and Convenience retail in the town has declined Pontypridd has not seen the number vacant units rise. Instead the town has changed its retail offer and adapted to the changing demands of consumers. The town centre now has a much broader offer combining a range of service activities alongside the local retail offer.

VACANCY RATES

The AECOM site visit (table 05 above) identified some 19 vacant units (10.7%) in October 2012 which is below the national average rate of 13.6% and shows a significant improvement on the 2009 Baseline which was also 13.6% in Pontypridd.

Town centre vacancy rates have generally spiralled across the UK since the 2007 economic downturn and continue to increase in many centres. Drawing on the annual surveys completed by RCT Spatial Planning Team, vacancy rates in Pontypridd remain highly volatile reaching a high of 18% in 2010 (mainly due to the Taff Vale Shopping Centre) and dropping to the lowest level recorded at around 7% in March 2011 and 2012; although it appears to have increased again to 10.7% at time of the AECOM site visit in October 2012. Indeed, even today, a number of “occupied” units in the town centre are being actively marketed which could be a sign of short-term leases being granted and a result of advance notice being given ahead of a lease-break or renewal date.

Figure 01: Retail Unit Vacancy Rates – 2003 to 2012



Source: RCT Spatial Planning Monitoring & AECOM Site Visit 2012

The map overleaf highlights the distribution of vacant units as recorded by the AECOM evaluation team.

Figure 02: Pontypridd Vacant Unit Locations 2012



Source: AECOM Evaluation Team – Town Centre Retail Survey, 2012

TRADER MIX

Independent traders comprise nearly 62% of all occupied shop units in Pontypridd in 2012. This is in sharp contrast to 2009 when the split was nearer 50/50 between independents and multiple retailers according to the Experian Goad survey and most likely reflects the emerging strength in wider services in the town.

In 2012 the ratio of independent to multiple retailers in Pontypridd has fallen more in line with the national trend. The significant change can be attributed to the changing fortunes of a number of large high street retailers. In the period since 2009 a number of national high street chains have reduced the number of outlets they are operating and this has impacted Pontypridd through the closure of operators such as Thornton's, Clinton Cards and others.

Table 06: Pontypridd Independent Retailers against Multiple Retailers

	2009		2010		2012	
	Independent	Multiple Retailer	Independent	Multiple Retailer	Independent	Multiple Retailer
Units	83	89	104	75	98	61
% of Occupied Units	48.3%	51.7%	58.1%	41.9%	61.6%	38.4%

Source: Experian Goad Survey 2009; AECOM site visit 2010 & 2012

PEDESTRIAN FOOTFALL

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'. In Pontypridd, footfall rates have been declining at a greater pace than the trend nationally since 2006. Whilst the decline in national footfall rates slowed to -2.7% and -1.4% during '2009-2010' and '2010-2011' in Pontypridd the pace of decline rose to 9.5% and 10% respectively.

Table 07: % Change in Town Centre Footfall Trends National and Pontypridd

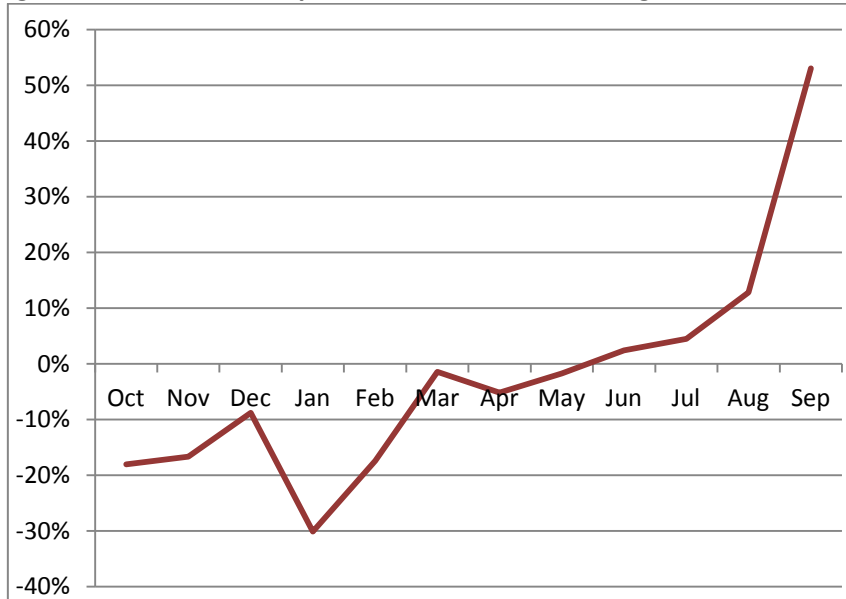
Year	National	Pontypridd
2006-2007	-4.6	
2007-2008	-5.6	n/a
2008-2009	-6.0	-6.9
2009-2010	-2.7	-9.5
2010-2011	-1.4	-10.0
2011-October 2012	n/a	+7.5

Source: ATCM Springboard National High Street Index 2010

Footfall data for '2011 to October 2012' appears to be extremely promising. Comparing the 10 months of 2012 to the same 10 months in 2011, the volume of footfall has increase by +7.5%. This means that if in the two months of November and December 2012 Pontypridd attracts more than 360,000 shoppers in total, then footfall for the 2011-2012 period will have exceeded the previous year, reversing the decline in footfall experienced in previous years.

The graph below illustrates that proportional change in footfall for the 12 months of October 2011 to September 2012. Between October 2011 and May 2012 footfall volumes each month were less than the same month a year previously, generally between 10% and 20% less. However, from June 2012 onwards the monthly volume of footfall in Pontypridd has been much higher than the same time in 2011 and 2010. In particular, footfall in September 2012 was over 30% greater than footfall in September 2011.

Figure 03: Oct 2011 to September 2012 Footfall Change on a Year Earlier



Source: ATCM Springboard National High Street Index - 2012

HEALTHCHECK CONCLUSION

Overall, the healthcheck analysis presents a picture of Pontypridd as a reasonably healthy town centre although the number of retail units in the town has contracted over the last couple of years. Vacancy rates have reduced and are now below the national average and the town has been successful in broadening its offer with a greater proportion of service provision, complementing the town's retail core. There are also early signs that Pontypridd may have arrested the previous decline in the number of people attracted to the town centre with footfall numbers significantly up in the past 6 months. Even so, the town remains exposed to the continued weakness and uncertainty in the national retail property market.

6. COMPARATIVE CENTRES

COMPARATIVE CENTRES

The 2011 Baseline Report positioned Pontypridd alongside a number of comparable town centres in the region. Changes in the performance of these town centres relative to Pontypridd 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.

RETAIL RANKING

The table below shows the changes in retail rankings between 2010 and 2011. Pontypridd has dropped two places in the Wales Ranking to 22nd place and is now ranked 500th in the UK. This appears to be in sharp contrast to Merthyr Tydfil, Pontypool and Ammanford, which have all improved their Welsh ranking performance by 4, 5 and 8 places respectively jumping up the national retail rankings. These towns are likely to have benefitted from the inclusion of major food-stores within their town centre footprint in the 2011 Javelin Venuescores, recognising the important destination draw of such facilities. Furthermore, Carmarthen has moved up to 5th place in Wales, replacing Cwmbran following the major town centre re-development.

Table 08: Comparator Towns Retail Rank 2010 and 2011

Town Centre	Retail Ranking Wales 2010	Retail Ranking Wales 2011	Retail Ranking UK 2010	Retail Ranking UK 2011
Cwmbran	5	8	210	231
Carmarthen	8	5	251	199
Bridgend	10	12	298	300
Llanelli	14	15	354	343
Merthyr Tydfil	15	11	373	288
Pontypridd	20	22	447	500
Aberdare	34	36	747	681
Ammanford	44	38	868	760
Pontypool	53	48	1,139	984

Source: AECOM using Javelin Venuescore National Retail Rankings

TOWN CENTRE MIX OF USES

The table below shows the mix of town centre uses in Pontypridd 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 Pontypridd, town centres across the Regeneration Areas in Wales also appear to present a much broader mix of uses compared to the UK national average.

Pontypridd has a much higher level of Comparison retail units relative to the Regeneration Area towns' average but remains below the UK national average. Although Pontypridd has a higher level of Service units than nationally, all Services are below the overall average for towns in the Regeneration Areas. Pontypridd also lags behind the Regeneration Areas in terms of convenience stores in the town centre although most towns are under-represented relative to the UK national average level of convenience store provision.

Pontypridd certainly appears to be a town in transition moving towards a more service oriented town centre from the previous dominance of national comparison retail provision in much the same way as other towns in Wales.

Table 09: Town Centre Mix of Uses

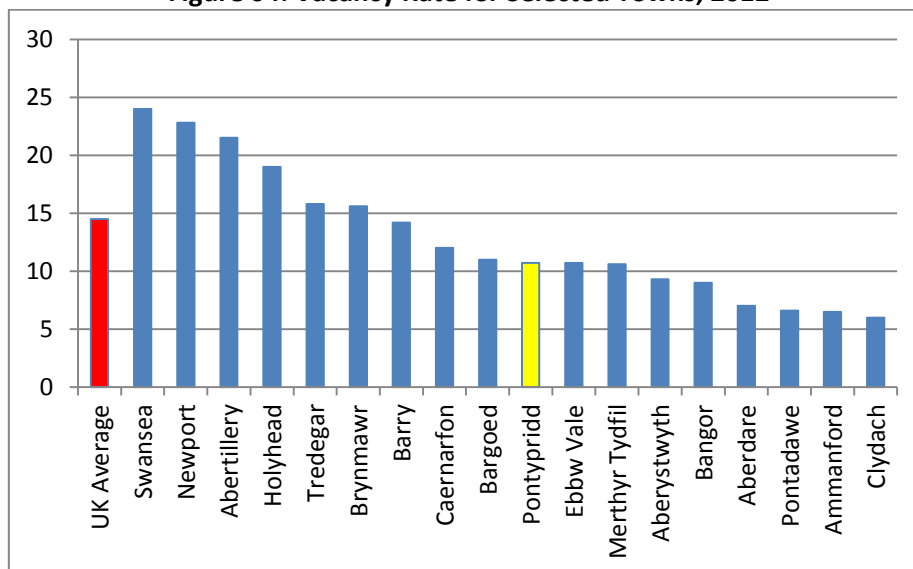
Town/Location	Convenience	Comparison	Retail Serv	Leis Serv	Bus Serv	Vacant
	Shop Units %					
UK Average 2011	8.5%	41.4%	10.9%	15.9%	9.6%	13.7%
RA Towns Average	7.5%	28.7%	16.1%	18.9%	15.7%	13.1%
Pontypridd (2012)	6.7%	38.8%	14.6%	16.9%	12.4%	10.7%
Newport (2012)	5.4%	28.1%	9.1%	17.0%	17.5%	22.8%
Aberystwyth (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%
Ammanford (2012)	8.4%	35.1%	13.6%	19.5%	16.9%	6.5%
Brynmaur (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%
Pontardawe (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.

TOWN CENTRE VACANCY RATES

The chart below shows the vacancy rate for Pontypridd (October 2012) compared with the latest available figures from towns across the Regeneration Areas and the UK average rate of 14.5%. The chart shows Pontypridd has a vacancy rate similar to Bargoed, Ebbw Vale and Merthyr Tydfil. There are 6 towns with vacancy rates generally lower than 10%, although these tend to be smaller town centres compared to Pontypridd. A further 8 towns have much higher vacancy rates many of which are above the national average rate at 2012.

Figure 04: Vacancy Rate for Selected Towns, 2012



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

VACANCY RATE TRENDS

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

Prior to the economic downturn kicking in from 2007 and the following recession, vacancy rates in Pontypridd were consistently below the national and Regeneration Area averages. Since then, vacancy rates in Pontypridd rose sharply but improved considerably in recent years. This is in contrast to most other towns in the Regeneration Areas in Wales where the average trend has remained above the national average until 2012.

Figure 05: Vacancy Rates for UK, Regeneration Areas and Pontypridd – 2003 to 2012



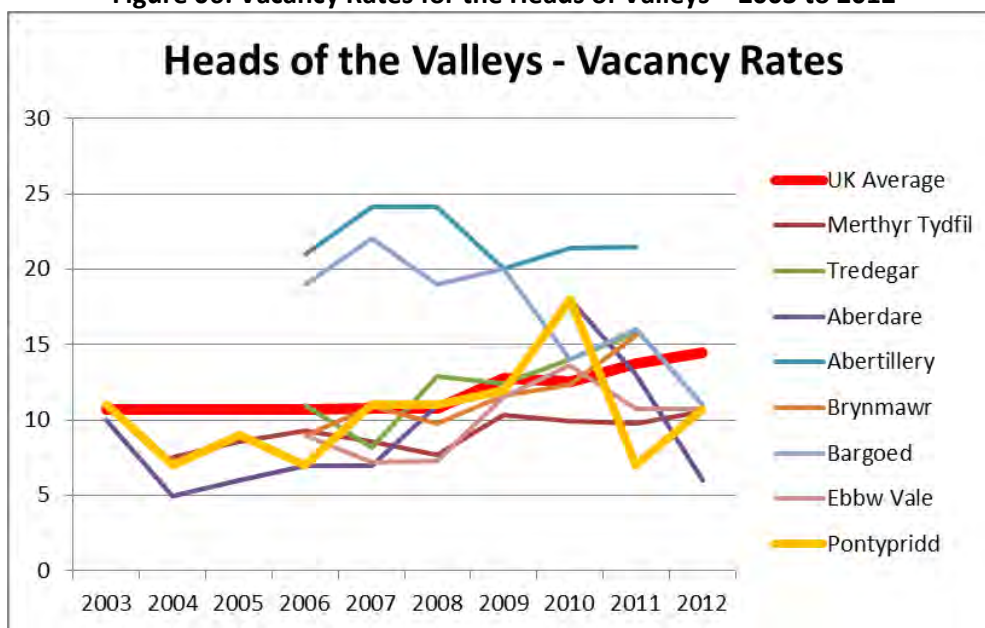
Source: PER Consulting Analysis 2012. UK Average Trends based on Experian Goad and The Local Data Company

Heads of the Valleys Towns

The Pontypridd vacancy rate trend is shown again in the chart below compared with data from seven towns in the Heads of the Valleys Regeneration Area and the UK average. There is a strong cluster of towns performing at or around the national average vacancy rate.

Abertillery appears to remain stubbornly above national average trends and considerably above most of the other towns analysed. Bargoed, on the other hand, has shown considerable improvement from “high” vacancy rates of around 20%+ in 2006/07 to below national average rate of 11% by 2012.

Figure 06: Vacancy Rates for the Heads of Valleys – 2003 to 2012



Source: PER Consulting Analysis 2012.

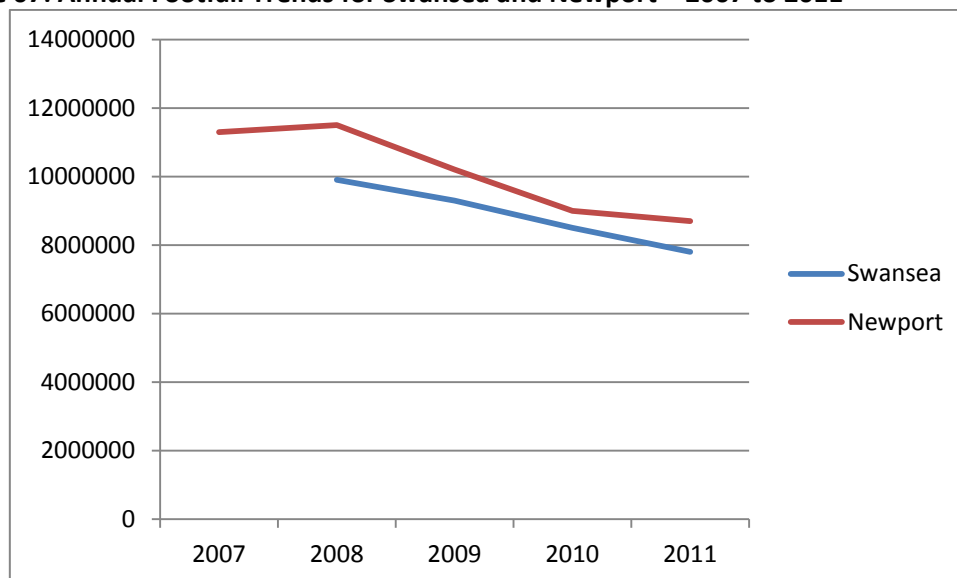
TOWN CENTRE FOOTFALL TRENDS

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. Although not included in the Regeneration Area Analysis, footfall in Pontypridd was around 2.5 million a year in 2012.

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.

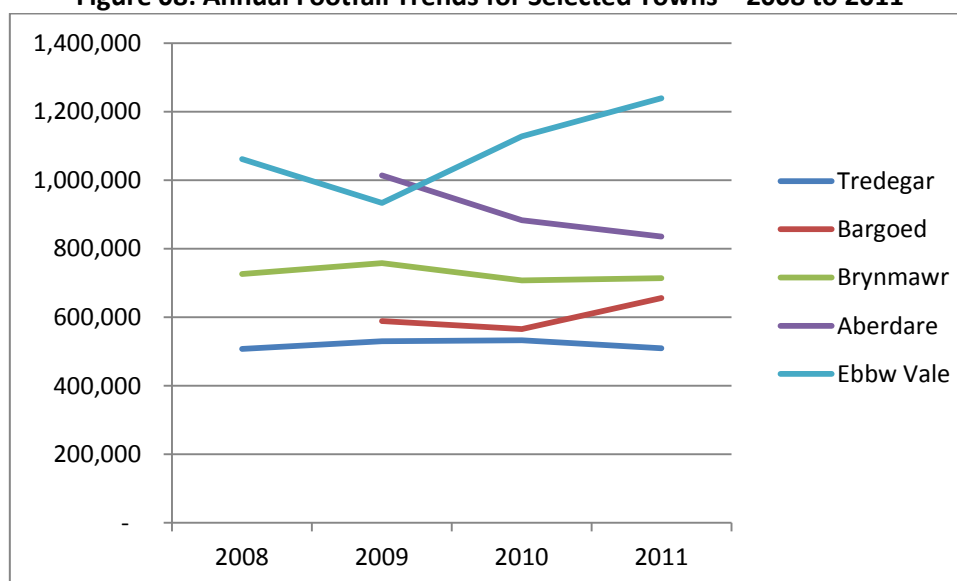
Figure 07: Annual Footfall Trends for Swansea and Newport – 2007 to 2011



Source: PER Consulting Analysis 2012

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.

Figure 08: Annual Footfall Trends for Selected Towns – 2008 to 2011



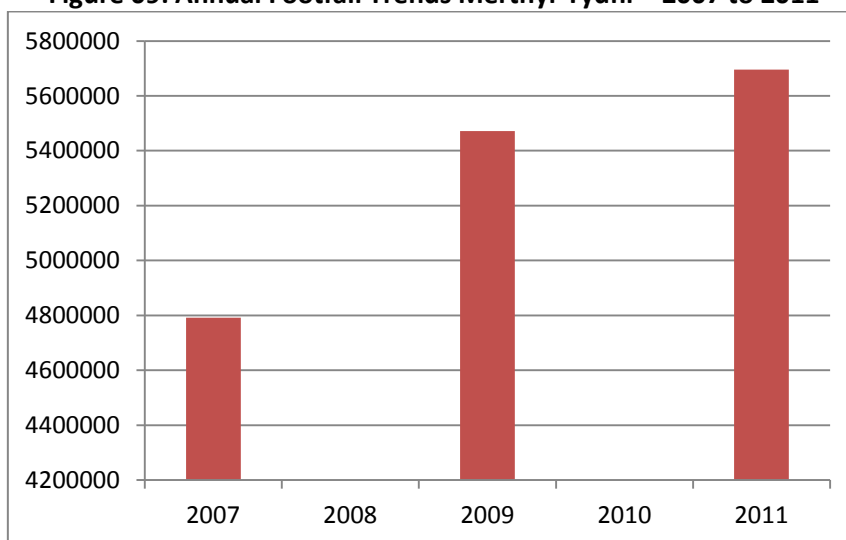
Source: PER Consulting Analysis 2012

By contrast, despite showing improvement in town centre vacancy rate, Aberdare has continued to lose annual footfall numbers, 18% down since 2009 from just over 1 million to 835,000.

Footfall trends in Brynmawr and Tredegar are relatively flat, down only around 5% over the past three years for which data is available.

Footfall data for Merthyr Tydfil is shown separately in the chart below as there have been interruptions and changes to the way data is captured and the locations of the footfall counters in the town. Contrary to the experience of other centres, this appears to show an increase in annual footfall in the town centre since 2007 rising from 4.8 million in 2007 to just over 5.6 million in 2011. This may, however, be due to anomalies in the data capture rather than a real underlying increase. A more consistent footfall count will now be possible going forward from 2011.

Figure 09: Annual Footfall Trends Merthyr Tydfil – 2007 to 2011



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. A clear trend across all three towns is the increasingly erratic nature of footfall in each of the three towns.

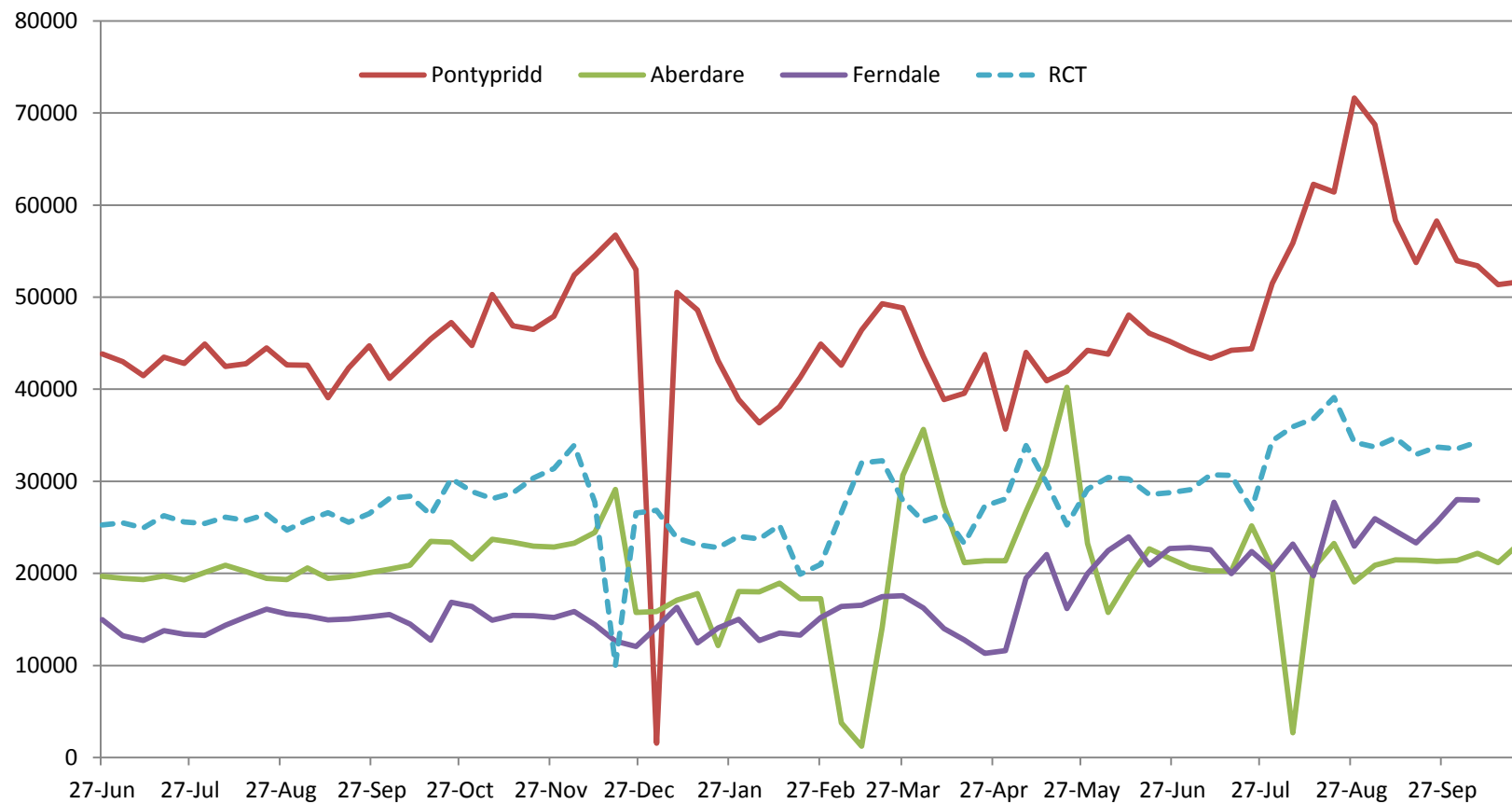


Figure 10: Footfall Trends RCT Town Centres

PART THREE

Evaluation Issues

7. CRITICAL REFLECTIONS

This report has raised a number of evaluation observations, that both reflect on what has been achieved to date and the current regenerations contribution towards outputs presented in the Business Case (July 2010).

Observations – Project Output & Outcomes

The aims and objectives of the project had been clearly defined and scoped in the Business Case (July, 2010). In-order to observe progress towards aims and objectives to date, the AECOM evaluation team has undertaken a number of site visits to Pontypridd. Clear progress has been made in all areas of the town that had been identified as priorities for regeneration.

Any significant town centre regeneration programme is likely to have a disruptive impact in terms of the need to re-route pedestrians and cars whilst contractors are on-site. How this process is managed is an important part of the regeneration process. Within Pontypridd, it was apparent that the reduction and mitigation of disruption has been addressed as best as possible.

Observations – Progress against Aims & Objectives

Whilst progress has been made across all priority areas, the land developed in the town at the time of the site visits in September 2012 was around 30% complete despite being half way through the development programme. However, the project is understood to be on schedule and according to the project plan the physical developments will be readily completed in Spring 2013.

With regard to the ERDF output to complete 1 ‘physical improvement scheme’ the completion of the total suite of proposed developments in Pontypridd constitutes 1 physical improvement scheme. Consequently this target measure and output can only be achieved at the completion of the whole scheme.

ERDF output ‘premises created or refurbished’ is currently at 20% of the outputs presented in the Business Case (July 2010). This leaves a further 80% of the output target yet to be achieved.

More significant progress has been made towards other ERDF outputs. ‘Enterprises Accommodated’ has achieved 40% of the target and appears to be on track to achieve its target.

ERDF Output ‘jobs accommodated’ has reached 70% of the business case target. However there is some discrepancy in how this output is measured. The WEFO indicator definition does not provide any guidance as to whether the employment density multiplier should be applied to gross or net floorspace. However, Homes and Community Agency ‘Employment Density Guidance 2010’ suggests that for the retail sector an employment density multiplier of 19 sq m should be applied to the net internal area.

As 280 sq m of gross internal floorspace has been created or refurbished this means that using the WEFO employment density for retail, either:

- 14 jobs have been accommodated (280 sq m / 20 sq m)
- 11 jobs have been accommodated ((280 sq m x 80%)/20 sq m)

The final ERDF output is the number ‘gross jobs created’. At the time of this report 30% of the target had been achieved. Each job had been identified through the payroll of each enterprise accommodated. It is not clear as to whether the same enterprises will contribute more jobs towards this ERDF output target or whether additional ‘enterprises accommodated’ will generate the remaining 70% of jobs.

Further to ERDF Outputs RCT has developed a number of Additional Outputs which are expected as a result of the proposed regeneration activities. A number of observations have been made with regard to these outputs. The outputs have been provided below in bold italics and the observations provided next to them:

- ***Reduction in Vacant Properties:*** The number of vacant properties in Pontypridd has declined since the Baseline assessment and is now also below the national average. The national retail property market, however, remains depressed and the town will continue to be exposed to occupier uncertainty as lease renewals fall-in.
- ***Increase Footfall:*** According to the ATCM Springboard High-Street Index, footfall across all towns and cities declined every year in the last four years for which data is available (2006 to September 2012). In Pontypridd the survey data shows footfall declined by 6.7% between 2008 and 2009, a further 9.5% between 2009 and 2010 and another 10% between 2010 and 2011. However, the target is to maintain a footfall count above 200,000 each month. In September 2012, the footfall count for Pontypridd was 264,038.
- ***Reduction in Commercial Yield Rates:*** Given continued constraint in the national retail property market and the general lack of investor confidence it is considered unlikely that the planned town centre improvements will lead directly to a reduction in commercial yields. Whilst no formal investment sales have been recorded in Pontypridd, the continued compression on rental levels and occupier uncertainty is assumed to have led to a softening of investment yields to around 8-9% in 2012 (from 7.75% in 2011).
- ***Increase in Zone A Rental Rates:*** Whilst there has been movement in occupiers in Pontypridd, the retail market continues to be highly variable and uncertain. Rental deals are currently being struck simply to remove the landlord burden of empty property rates and on relatively short-term agreements. Market rents remain under significant pressure, nationally, and are estimated to have reduced further in the last 12 months or so to around £35-£40 Zone A for prime sites in Pontypridd.
- ***Improvement in Public Perception of Town Centre:*** This aspect of the evaluation has not been updated at the interim evaluation stage.
- ***Reduction in Car Journeys to Pontypridd:*** This aspect of the evaluation has not been updated at the interim evaluation stage.

8 CONCLUSIONS & RECOMMENDATIONS

The tables below reproduce a number of the ERDF and Additional Outputs laid out in the Business Case (July 2010). Additional Outputs have been amended in the table below in order to incorporate a number of new targets or measures in-light of the evaluation observations made above. ERDF Outputs have not been amended, however, as they have been agreed and confirmed by WEFO. The table also presents progress towards both ERDF and Additional Outputs as at September 2012.

GENERAL PROGRESS

Overall, very good progress has been made with implementation of the town centre improvements in line with the original design objectives. Whilst this has created inevitable disruption within the town, trading activity and business performance appears to be coping well. Importantly, pedestrian footfall appears to be rising despite the on-going works and will, hopefully, continue as the benefits of the environmental improvements are realised.

MONITORING PERFORMANCE

Rhondda Cynon Taff County Borough Council has maintained good quality records on project delivery and implementation providing clear evidence in support of emerging outputs and outcomes.

TOWN CENTRE ACTIVITY

The town centre improvements are taking place during a time of considerable and continuing commercial market uncertainty; especially in the retail sector. As to be expected, therefore, Pontypridd town centre continues to evolve with more emphasis emerging on service activities rather than pure retail focus. This is good for the town in meeting the needs of the local community and providing an alternative offer to other competing centres. Furthermore, the town is seeing a stronger presence of local independent traders, now 60% of all occupied units compared with less than 50% in 2009. Despite the challenges, vacancy rates in Pontypridd remain below the UK and Wales average and a number of units have secured new tenants relatively quickly after losing long-standing occupiers in the past.

Overall, Pontypridd continues to demonstrate a healthy and vibrant town centre which is benefitting from the investment being made to date.

Table 10: ERDF and Additional Outputs

Indicator	Business Case Regeneration Targets	Interim Progress (September 2012)		
ERDF				
Land Developed	1.23ha	0.397ha		
Physical Improvement Schemes	1	0%		
Premises Created or Refurbished	1,300 m ² (10 premises)	280 m ² (2 premises) (21.5%)		
Enterprises Accommodated	10	4 (40%)		
Jobs Accommodated	20	14*		
Gross Jobs Created	20	6 (30%)		
Additional Outputs				
	Baseline	Original Target	Revised Target	Interim Progress (September 2012)
Reduction in Vacant Properties	12% <i>(Source: RCT Spatial Planning Team, 2009)</i>	8%	Below 12%	Good Progress Down to 10.7%
Increase in Footfall	215,000 per month <i>(Source: Business Case, July 2010)</i>	+5% Increase above RCT Trend	Maintain footfall average above 200,000 per month	185,803 per month (10 month average) Good Progress UP on 12 month earlier
Reduction in Commercial Yield Rates	7.75% <i>(Source: Business Case, July 2010 – Confirmed by Robert Chapman Associates)</i>	7%	7.75%	8-9% Poor Progress Effect of National Recession
Improvement in Public Perception of Town Centre	65% believe the Town Centre to be 'Poor' <i>(AECOM Shopper Survey, March 2011)</i>	50% improvement	33% believe the Town Centre to be 'Poor'	Not Measured in Mid- Term Evaluation
Increase in Zone A Rental Rates	£50-£60 per square foot <i>(Source: Business Case, July 2010 – Confirmed by Robert Chapman Associates)</i>	£60-£70 per square foot	£50-£60 per square foot	£35-£40 per square foot Poor Progress Down on Baseline
Reduction in Car Journeys to Pontypridd (and Increase in Sustainable Transport)	41% visit by car <i>(AECOM Shopper Survey, March 2011)</i>	59%	4% reduction in car journeys	Not Measured in Mid- Term Evaluation

Source: AECOM and Pontypridd Business Case, July 2010

*Note: WEFO approved methodology has changed since the original target was set – see explanatory text page 11

OUTCOMES

Throughout the Business Case (July 2010) significant attention has been given to the outputs desired from the regeneration projects. There are, however, a number of outcomes resulting from the regeneration activity which are referenced in the Business Case (July 2010) but not fully captured in the output tables.

Appraisal Process and Procurement Decisions and will also contribute to the long term sustainable impact of the regeneration process. These additional outcomes will also need to be monitored and evaluated in the final stage report as follows.

Table 11: Regeneration Project Outcomes

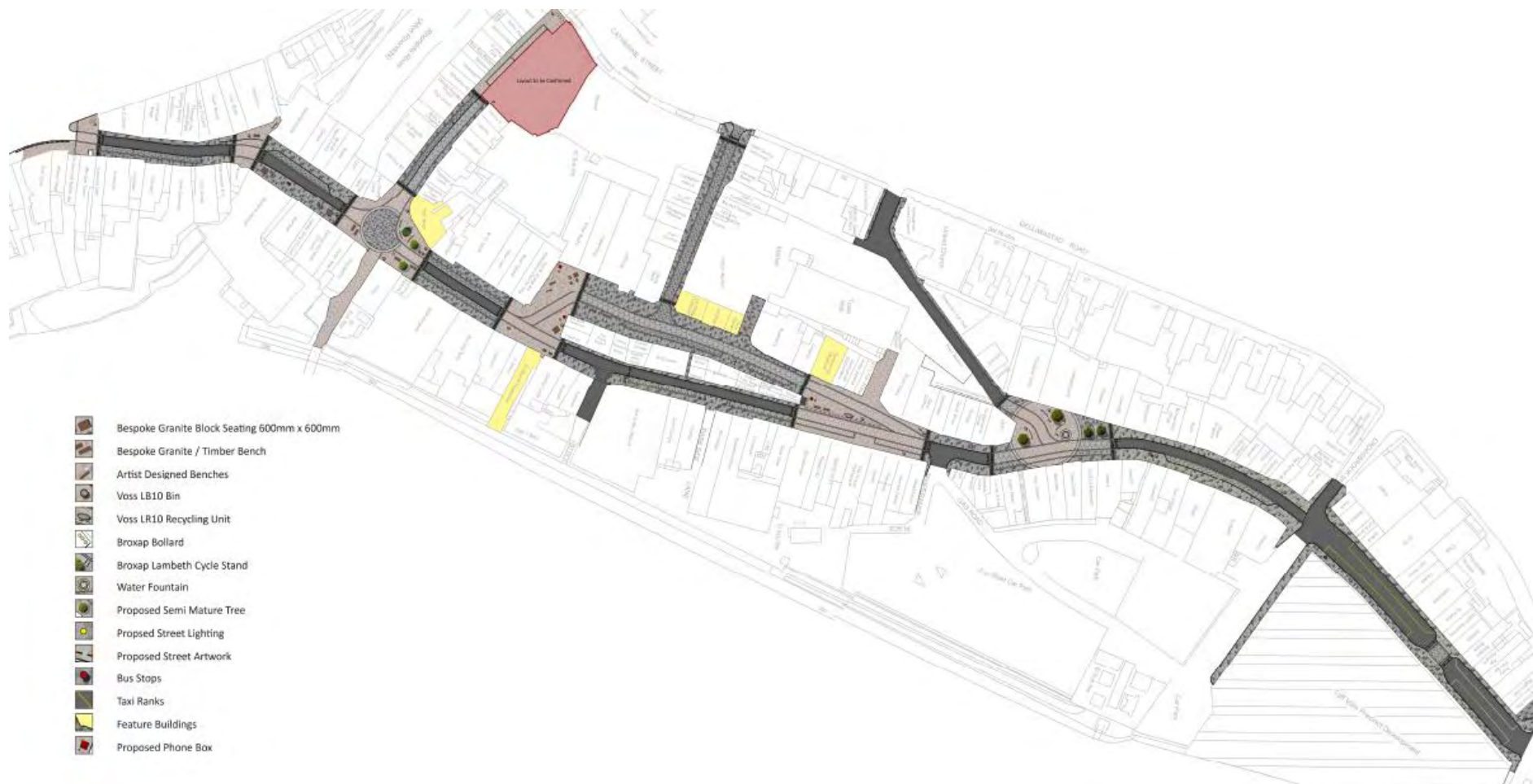
Outcome	Measure
Private Sector Investment	The amount of money leveraged through Townscape Enhancement programme. In addition to investment in the town resulting from Public Realm improvements. This is likely to be to the sum of £500,000, which is a £200,000 increase on the original target.
Increase Employment of the Economically Inactive	Through creating employment with the new contractor the regeneration activities in Pontypridd have created up to 32 new posts.
Maximise Local Supply Chain Links, in Particular with SME's	To be confirmed in Final Business Case following completion of Value Engineering exercise and supply chain procurement.
Improve Safety During Construction	Regeneration in Pontypridd has been awarded the 'Considerate Constructor Award'. For all categories of the Award Pontypridd was awarded 4.5 or higher, which stipulates a high level of consideration that is above compliance.
Reduce Construction Waste	To be confirmed in Final Business Case
Reduce the Length of the Works Programme	To be evaluated on completion of works against expected programme.
Reduce the Impact of the Works on Traders and the public	To be evaluated through consultation and perception surveys. It should be noted at this stage that a Communication Strategy has been written in-order to keep local people and businesses up informed of progress.

Source: Pontypridd Business Case, July 2010 and RCT November 2012.

Appendix 01

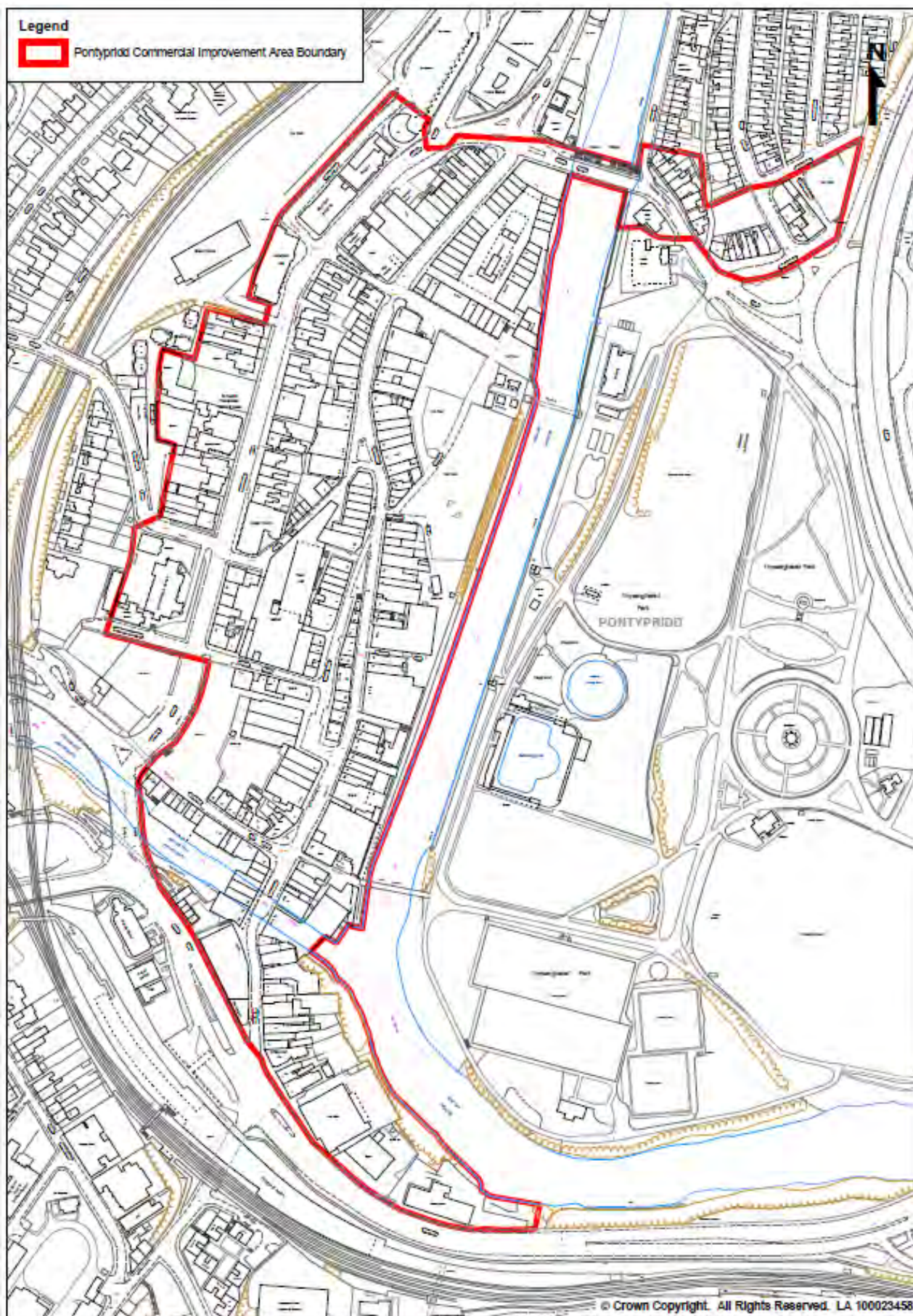
Town Centre Regeneration Project Proposal Design Details

Includes revamp to Penuel Square and updated street furniture locations



Appendix 02

Pontypridd Commercial Improvement Area Map



Appendix 03

Wider Regeneration Projects

Projects Completed

Municipal Building Refurbishment - £1.2 million

Extensive repair and refurbishment works have been delivered to a key, listed, town centre building. Funded solely by Rhondda Cynon Taf County Borough Council a number of services have been re-housed there. The Mayor's office has been re-established in addition to the registrar's service, thus providing important civic duties and roles in the heart of the town.



Completed refurbishment of Municipal Buildings, 2009

Ty Pennant - £10 million

Opened in 2008 the development was funded with investment of £8million from the Private Sector, £1million from the Welsh Assembly Government and £1million from Rhondda Cynon Taf County Borough Council. This building provides the town with 40,000sq ft of office space and a car park with a pedestrian-friendly underpass leading directly into the retail core of the town centre.



Completed Ty Pennant development

Art Works - £302,000

A Steering Group representing stakeholders including, local businesses, community groups, artists, as well as representatives from the Council and funding providers, was established to drive forward the projects. It agreed upon 3 projects to be located at sites of local importance – lighting projects at the historic William Edwards Bridge and Brunel Viaduct and a sculpture by Andy Hazell for the Brown Lennox roundabout. These artworks act as key gateway features which encourage visitors into the centre of Pontypridd. Rhondda Cynon Taf County Borough Council was successful in securing a multi-agency package of funding, with the majority of the project costs funded externally.



Unity artwork, 2011



Brunel Viaduct Illuminations, 2009

Train station canopy restoration - £2 million

The refurbishment of Pontypridd train station canopy took place in late 2011, aesthetically enhancing the listed train stations canopy, and creating a more attractive welcome for commuters. This was complemented by small scale improvements, including: relocation of the pedestrian entrance, a new ticket office, improved seating and waiting areas, improved security and fencing, additional CCTV, toilet upgrading, and new signage. These works act as the first phase prior to the National Station Improvement Programme (NSIP+), which is a project underway.



Train station canopy before and after refurbishment works were undertaken, 2011

Pontypridd Museum - £153,000

The museum received grant funding from the Heritage Lottery Fund, Cadw, alongside contributions from the town council to undertake important refurbishment works for a new roof as well as both external and internal refurbishment. The funding was used to carry out urgent re-slating of the roof, bringing the ornate ceiling back to its original 1910 condition and restoring the original Victorian ventilation system. An integral part of the project was to use the conservation work to increase opportunities for people to learn about their local architectural heritage.



Enhancements are made to the historic Museum building

Gas Road Car Park - £180,000

An investment was made by the Council to resurface the car park, enhancing parking provision for town centre shoppers and workers, including additional disabled parking bays.



Improvements were made to Gas Road car park in 2011

Roll of Honour Memorial Walls In Ynysangharad Park - £91,000

Public donations along with Council contributions funded the creation of Roll of Honour Memorial Walls in Ynysangharad Park, which were unveiled in 2011. Working alongside Pontypridd Town Council and the Royal British Legion, names of each of those who bravely served and died in the World Wars and subsequent global conflicts are included, set within the beautiful grounds of Ynysangharad War memorial Park.



The Roll of Honour Memorial Walls were unveiled at a dedication ceremony in 2011

Brown Lenox Site - £50 million

Redevelopment of the Brown Lenox Site was completed through the opening of a new Sainsbury's store in the summer of 2012. The large brown field site development created approximately 200 jobs with a 40,000 sq ft sales space, petrol station, shopper's car park, and associated access improvements.



Dignitaries visit the construction site, and later in the year the new Manager opens the store in the summer 2012

PROJECTS UNDERWAY

Pontypridd Lido restoration - £6.3 million

The project which received funding in February 2013 will restore the historic grade II listed lido to a high standard, restoring the lido's historic features, such as the original turnstiles, and wooden cubicles. The lido will reopen as a heated facility, with three pools for different uses: a main pool, an activities pool, and an attractive semi-circular paddling pool for small children. Additionally a high quality café to serve the lido and wider park will be constructed, as well as a new changing block in line with modern expectations, visitor interpretation space, viewing gallery, and classroom/meeting facility, which can act as a hub for community learning and volunteering opportunities. The lido will have free entry for children aged 12 or under and accompanying adult, and will be complemented by a state of the art adventure dry play facility open all year.



Current status of the lido and restoration proposals

Connect 2 - £1.1 million

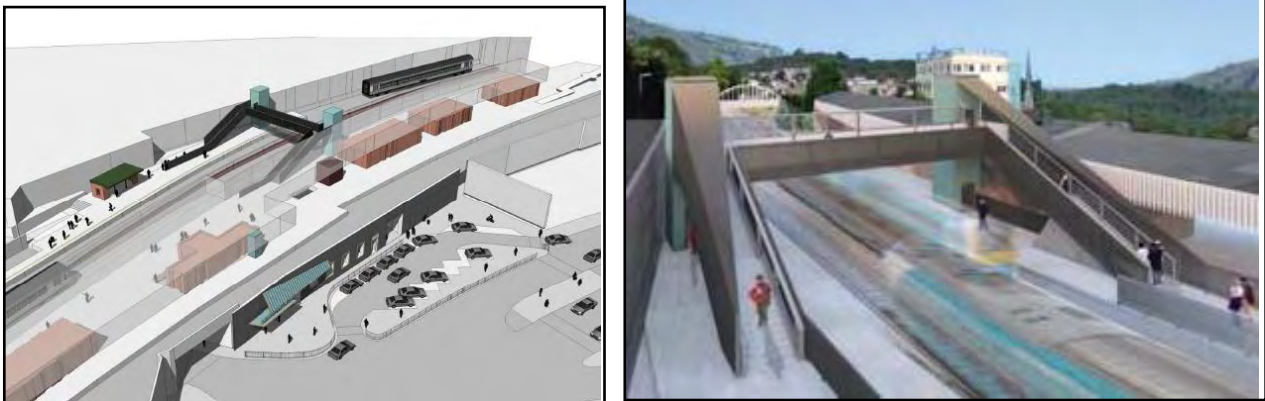
Work is nearing completion on the creation of new cycle route between Treforest and Pontypridd as part of the national Sustrans Connect 2 scheme. This £1.1 million project is supported by the ERDF, approved from the Convergence Programme Priority 3 Theme 1 (£650,000) and from the Big Lottery (£450,000). The project will link the community routeway as part of the new Church Village ByPass, the University of Glamorgan, Ynysangharad Park and the Taff Trail. The Treforest to Tonteg link opened in March 2012, and a new bridge is presently being constructed to join Llantwit Road to the Tonteg Link. This is expected to be completed in the Spring 2013, when the Treforest Community Route will be opened.

St Catherine's Church - £750,000

Renovations are nearing completion to the church hall which is now connected to the church through a new foyer. The hall is being turned into a wifi family café with play area and public access computers. Two meeting rooms have also been completed to be used by a range of social groups. The project has taken place following funding from a number of sources including the Big Lottery Fund, Welsh Government and RCT.

National Station Improvement Programme (NSIP+) - £5.5 million

Investment has been secured from the European Regional Development Fund through the Welsh Government, to improve Pontypridd railway station as part of the wider National Station Improvement Programme (NSIP+). Works to Pontypridd train station are presently in the detailed stages of design, and are set to include: relocation of the pedestrian entrance, a new ticket office, improved seating and waiting areas, improvements to platforms, a new pedestrian footbridge, and significant remodelling of the forecourt. The collective works are set to have a significant positive impact to one of the town's gateways, and will also bring a third platform back into use, increasing the number of trains visiting Pontypridd each hour.



Artist impressions of enhancements to Pontypridd train station

Taff Vale Centre site - £6 million

The demolition of the Taff Vale Centre has now been completed, which removes a major eyesore from the town. Planning permission has also been attained for the construction of a series of large retail units, and one café/restaurant unit. The established site developer will no longer be taking forward the scheme, and new owners/developers of the site are currently being sought.



Demolished Taff Vale Centre site

Pontypridd YMCA - £4 million

Ambitious plans are being developed for the enhancement of Pontypridd YMCA, one of the town's key buildings. The proposals include creation of facilities for local voluntary group Artis Community, including a high quality dance studio, alongside the creation of facilities for Pontypridd YMCA. The project will also result in significant visual improvements to the exterior of the building, including a revitalised look for the upper floors, and creation of new elevations on Morgan Street.



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