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## Bridgend LDP Review

Retail Study 2018



On behalf of **Bridgend County Borough Council**

Project Ref: 45365/RS/001 | Rev: B | Date: July 2019

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# 1 Introduction

## 1.1 Background

- 1.1.1 PBA, now part of Stantec (PBA) was commissioned by Bridgend County Borough Council (BCBC) in December 2018 to prepare a new Retail Study to inform the ongoing review of the adopted Bridgend Local Development Plan ('the LDP Review').
- 1.1.2 This Retail Study, which covers the 2018–2033 plan period, forms a key evidence base document to inform the LDP Review and the production of a replacement LDP by 2021, as it sets out evidence-based recommendations on retail need, the distribution of need and the definition of primary shopping areas to inform emerging policies and site allocations. This Study also addresses relevant policy changes since 2012, in particular the implications of the recently published 10<sup>th</sup> edition of Planning Policy Wales (December 2018), as well as TAN 23 Economic Development (2013) ('TAN 23').

## 1.2 Purpose and objectives

- 1.2.1 The purpose of this report is to contribute to the LDP Review evidence base by examining retail need and town centre performance within the BCBC area. The report responds directly to three overall objectives as specified by BCBC:
- i. Undertake a review of the vitality and viability of existing retail/town centres across the BCBC area
  - ii. Undertake a household retail survey to determine existing shopping patterns
  - iii. Calculate retail floorspace requirements for the replacement Bridgend LDP plan period (2018 – 2033).
- 1.2.2 The Study's specific terms of reference are set out below:
- Analyse national and regional planning policy and guidance on retail and town centres and identify existing evidence on retail needs in BCBC
  - Analyse trends affecting the retail sector which may impact and influence local retailing within the borough and how this may change over time
  - Undertake a new household survey of shopping patterns to provide an updated picture of shopping habits in the study area to identify the catchment area of each town centre
  - Analyse the quality of existing comparison and convenience retail provision and other town centre uses within BCBC's existing network of designated centres
  - Identify existing and projected retail expenditure levels for the study area using the latest industry standard expenditure data and population projections
  - Identify extant retail planning permissions ('commitments') within and without the borough which have the potential to impact on retail needs and designated centres
  - Assess future needs for comparison and convenience retail floorspace to 2033 based on existing market shares
  - Review the existing hierarchy and network of centres and make recommendations including identifying any deficiencies and potential for growth to meet identified needs where appropriate

- Allied to the above, make recommendations on the appropriateness of retail centre boundaries including primary shopping areas
- Recommend appropriate retail planning policies for the LDP review.

### 1.3 Report structure

1.3.1 Responding to the objectives and terms of reference identified above, this report is structured as follows:

- **Section 2** sets out the planning policy context
- **Section 3** describes the strategic context and existing role and function of the borough's designated centres
- **Section 4** sets out key market and economic trends in the retail sector
- **Section 5** explains shopping patterns of the borough's residents, based on evidence from a telephone survey of households
- **Section 6** assesses the quantitative and qualitative need for additional retail floorspace in the convenience (food) and comparison (non-food) sectors
- **Section 7** sets out the recommendations and conclusions.

## 2 Planning Policy Context

### 2.1 Introduction

2.1.1 Welsh national planning policy, as set out in Planning Policy Wales – 10<sup>th</sup> Edition (2018) (PPW), requires local authorities to assess and meet retail needs through appropriate planning policies and site allocations. This section summarises the planning policy context as it applies to this Retail Study, both in terms of relevant requirements within PPW and the implications of relevant guidance documents; TAN 4 and TAN 23. The section also provides a review of existing retail and town centre policies from the adopted Bridgend LDP (2013) within the context of current national policy requirements.

### 2.2 National policy and guidance

#### Planning Policy Wales

2.2.1 PPW now forms the national planning policy applicable in Wales. PPW provides national guidance for planning authorities in terms of plan making and decision taking. Paragraph 1.26 of PPW states:

*“LDPs should set out a vision for how places are expected to change in land-use terms to accommodate development needs over the plan period. This provides certainty for developers and the public about the type of development that will be permitted at a particular location. LDPs contain locally specific policies to explain or develop national policy further and to take forward local priorities for action.”*

2.2.2 Section 4.3 of PPW specifically provides guidance on retail and commercial development. Paragraph 4.3.1 emphasises the importance of commercial centres for creating a sustainable strategic plan, stating:

*“Retail and commercial centres are hubs of social and economic activity and the focal point for a diverse range of services which support the needs of local communities. They are highly accessible to different modes of transport and are the most sustainable locations for new development.”*

2.2.3 Paragraph 4.3.3 highlights that the Welsh Government has identified a number of overarching objectives for retail and commercial centres, which planning authorities should aim to deliver through their LDPs. It states:

*“The planning system must:*

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

2.2.4 Paragraph 4.3.5 states:

*“Planning authorities should establish through their development plan a clear strategy for retail development, supported by policies, to achieve vibrant, attractive and viable retail and commercial centres. The strategy and policies should set out a framework for the future of*

*retail and commercial centres in their area, taking in to account strategies in adjoining authorities, to promote a successful retailing sector supporting existing and new communities.”*

2.2.5 Building on the key policy provisions summarised above, **Table 2.1** summarises the key requirements set out within PPW of relevance to this Retail Study.

Table 2.1 PPW retail policy requirements

Paragraph	Key requirements
<b>Assessing designated centres</b>	
4.3.6	Retail and commercial centres experience growth and decline. Local authorities should identify and pro-actively address the growth and decline of retail and commercial centres within their LDP policies. Authorities should use a robust evidence base to identify retail/commercial centre locations for future expansion or identifying measures to reinvigorate and/or manage existing centres' relative importance.
<b>Retail hierarchy</b>	
4.3.10	Planning authorities should establish a hierarchy of retail and commercial centres in their development plan strategy and identify boundaries for retail and commercial centres on the proposals map.
4.3.11-12	<p>Planning authorities should categorise retail and commercial centres in a consistent way taking account of the following characteristics: size, scale, form, function and location. Important considerations include the range of uses present or the extent of the catchment area.</p> <p>The hierarchy should distinguish between higher order centres which have a wider range of uses and larger catchment areas, and lower order centres which are important to communities for day-to-day needs.</p>
<b>Meeting retail needs and allocating retail sites</b>	
4.3.14	When allocating retail sites in LDPs or determining applications for retail uses, planning authorities must consider the evidence for additional need. However, there is no requirement to demonstrate such need when a site is within a defined retail or commercial centre boundary or allocated in a LDP for a specific retail use.
4.3.15	Need may be quantitative, to address a quantifiable unmet demand for the provision concerned, or qualitative. Precedence should be given to establishing quantitative need before qualitative need for convenience and comparison floorspace is considered, particularly as a basis for development plan allocations.
4.3.16-17	<p>Qualitative retail needs assessments should consider the quality of the retail offer, the range of goods available and accessibility of retail facilities. The planning authority will determine the weight given to any qualitative assessment having regard to the following considerations:</p> <ul style="list-style-type: none"> <li>– contributes to a substantial reduction in car journeys</li> <li>– improves accessibility of retail facilities by walking, cycling or public transport</li> </ul>

Paragraph	Key requirements
	<ul style="list-style-type: none"> <li>– contributes to the co-location of facilities in existing retail and commercial centres</li> <li>– significantly contributes to the vibrancy, attractiveness and viability of such a centre</li> <li>– assists in the alleviation of over-trading of, or traffic congestion surrounding, existing local comparable stores</li> <li>– addresses locally defined deficiencies in provision in terms of quality and quantity, including that which would serve new residential developments</li> <li>– alleviates a lack of convenience goods provision in a disadvantaged area.</li> </ul>
4.3.22	In allocating sites, planning authorities consider factors such as floorspace, quality, convenience, traffic generation and attractiveness of the site. However, authorities should not prescribe rigid floorspace limits which unreasonably inhibit the retail industry from responding to changing demand and opportunity.
4.3.24	LDP policies should protect existing retail sites from inappropriate development. However, where there is evidence that an existing site is no longer required, they should consider that alternative uses may be appropriate and include policies in its plan accordingly.
<b>Defining centres</b>	
4.3.31	Primary areas are characterised by a high proportion of A1 retail uses. Their designation requires an understanding of the existing distribution of uses in a centre together with careful consideration of a centre's role and how it relates to the retail strategy for the area.
4.3.31	Secondary areas typically contain a broader mix of uses, for example shops, cafes and restaurants, financial establishments and other services and community facilities.
4.3.32	Planning authorities should identify which retail and commercial centres in their LDP have primary and secondary shopping areas and show them on their proposals map.
4.3.35	Where the right balance of use and activity is not being achieved, planning authorities should consider making changes to the acceptable uses in primary or secondary areas, or the retail and commercial centre boundaries themselves.
4.3.36	Planning authorities should monitor the health of retail and commercial centre performance and the effectiveness of their LDP management policies. Where economic decline impacts retail and commercial centres authorities should consider how non-A1 uses can increase diversity and reduce vacancy levels.
<b>Managing Decline in Centres</b>	
4.3.37	Where the periphery of a retail and commercial centre is assessed to be in decline and regeneration initiatives are unlikely to be successful, changes to the retail and commercial centre boundary may be appropriate. Within a retail and commercial centre boundary change of use to residential may also be

Paragraph	Key requirements
	acceptable, however night-time noise considerations may be a limiting factor. Residential use is unlikely to be suitable on the ground floor within primary areas or other places of concentrated A1 uses.
4.3.38	If a retail/commercial centre has declined to the extent that it is no longer viable or has any prospect of retaining or attracting future investment, then authorities should consider removing the retail centre status from that area.

### Technical advice notes

- 2.2.6 The PPW is supported by a suite of technical advice notes (TAN), circulars and policy clarification letters issued by the Welsh Assembly Government. These are material considerations in both LDP preparation and the determination of planning applications where relevant.

#### TAN 4: Retail and Commercial Development (2016)

- 2.2.7 Of direct relevance to this Study is TAN 4: Retail and Commercial Development (2016), which sets out guidance on the role of land use planning in retail and commercial development. Section 3 of TAN 4 highlights the role of development plans and LDP policies, paragraph 3.1 states:

*“Through development plan policies and supplementary guidance, local planning authorities should develop their retail evidence base and plan positively to protect and enhance the vibrancy, viability and attractiveness of their retail and commercial centres.”*

- 2.2.8 Section 3 goes on to state that local planning authorities should develop a local hierarchy to classify their various retail and commercial centres and apply appropriate policies to those centres based on their characteristics. The future status of those centres should be included in the assessment of the hierarchy, including future allocations and other identified growth.
- 2.2.9 Paragraph 4.6 states that out-of-centre retail parks should not normally be included in the local hierarchy, however the ability of such parks to become centres in their own right may be assessed against local criteria.
- 2.2.10 Paragraph 5.2 states that if a need for further retail development is identified, a local planning authority will need to express through their retail strategy and LDP allocations how that need should be accommodated. Paragraph 5.3 states that in such circumstances potential sites within existing centres should be prioritised as the most sustainable location for development.
- 2.2.11 Paragraph 5.3 states that where an increase in need is identified, local planning authorities should consider whether a centres boundary should be extended. Paragraph 5.4 states that in the opposite circumstance, where there is identified decline to the point of no longer being viable, this change should be managed as part of a retail strategy. This management should *“ensure that communities retain access to the goods and services which they require”*.
- 2.2.12 Paragraph 5.7 extols the importance of the night time economy for developing a buoyant economy. The paragraph states strategies should consider aspects such as public safety and amenity carefully when considering such uses to ensure a balanced and holistic approach.
- 2.2.13 Section 6 explains that demonstrating retail needs is the starting point for new retail development in LDPs and the development management process. The Welsh Government does not prescribe a method for undertaking needs assessments, Paragraph 6.3 states that it is:

*“up to each local planning authority to be satisfied with quantitative retail need evidence in policy making or the development management process. Local planning authorities and developers should therefore ensure assessments are prepared in a clear logical and transparent way with the use of robust and realistic evidence.”*

2.2.14 TAN 4 states that such needs assessments usually include the following inputs:

- Existing and forecast population data;
- Comparison and convenience goods expenditure forecasts provided at the lowest geographical area possible to reflect local circumstances;
- Sales density data for existing and future retail floorspace which is realistic and benchmarked against similar retail developments in the area; and
- Catchment areas for centres and individual stores which are related to the size and scale of the development and its likely trade draw.

### **TAN 23: Economic Development (2014)**

2.2.15 Published in February 2014, TAN 23 acknowledges wealth, jobs and income involves a very wide range of uses, and it is therefore important to look at the whole economy rather than only certain use classes, when planning for economic development. The document reiterates higher level policy objectives, including the need where possible to use economic development to benefit disadvantaged communities, but it also instructs local planning authorities to recognise market signals and guide economic development to the most appropriate locations. TAN 23 also reinforces the need to look cross-boundary, as planning for economic growth requires a ‘larger than local’ approach.

2.2.16 Paragraph 1.2.5 states that local planning authorities should recognise market signals and have regard to the need to guide economic development to the most appropriate locations, rather than prevent or discourage development.

2.2.17 Section 2 states that economic objectives should not be seen in conflict with environmental and social objectives and that planning should seek “win-win” situations through steering development to its most suitable location.

2.2.18 Section 4.2 states that economic issues are generally larger than local authority boundaries and thus evidence should be considered at the local and regional scale to develop an overview to inform the economic vision and policies of emerging LDPs.

## **2.3 Development Plan**

2.3.1 The current statutory Development Plan applicable to the BCBC area comprises the Bridgend LDP, which was adopted in 2013 and covers the period of 2006-2021. The LDP sets out BCBC’s strategic objectives and contains development management policies for decision making in accordance with the Planning and Compulsory Purchase Act 2004.

### **Policy objectives**

2.3.2 The LDP objectives which relate specially to retail and town centres are identified in **Table 2.2 below:**

Table 2.2 Relevant LDP objectives



Objective	LDP summary text
OBJ 1a	<i>"To promote Bridgend as the key principal settlement of the County Borough where major employment, commercial and residential development is focused."</i>
OBJ 1b	<i>"To revitalise Maesteg by recognising its role as the principal settlement serving the Llynfi Valley which has the potential capacity and infrastructure to accommodate future growth."</i>
OBJ 1c	<i>"To realise the potential of Porthcawl as a premier seaside and tourist destination which capitalises on the regeneration of its waterfront."</i>
OBJ 1d	<i>"To recognise the strategic potential of the Valleys Gateway to provide for future development and facilities serving the whole of the County Borough."</i>
OBJ 1e	<i>"To promote sustainable and attractive valley settlements with improved access to jobs and services."</i>
OBJ 3a	<i>"To build a more diverse, dynamic and self-reliant economy and business environment."</i>
OBJ 3c	<i>"To bring the benefits of regeneration to the valley communities by directing new development to those areas at a scale which acknowledges their geographical constraints and infrastructure capacity."</i>
OBJ 3e	<i>"To enable Bridgend Town to become an attractive and successful regional retail and commercial destination which meets the needs of its catchment. "</i>
OBJ 3f	<i>"To support viable town and district centres in the County Borough which are attractive and economically successful."</i>
OBJ 3g	<i>"To protect and promote the role of smaller shopping centres and freestanding local shops in the County Borough."</i>

## Retails needs

- 2.3.3 Paragraph 5.2.23 of the LDP states that the convenience needs analysis undertaken by CACI Ltd in 2007 and updated in 2010 concludes that there is no need to allocate convenience floorspace up to 2021 aside from an allocation within the Porthcawl Regeneration Area for a 2,500 sq m net convenience goods supermarket (Policy REG9(6)).
- 2.3.4 Paragraph 5.2.24 states that identified sites within Bridgend town centre can deliver the required level of comparison floorspace identified in the CACI Vision report which will create a step-change in its retail provision. More detail of the level and types of provision on these sites can be found in the Bridgend Town Centre Masterplan (2011) ('the Masterplan') which supports the LDP.
- 2.3.5 Based on the findings of the 2010 CACI study, the Masterplan summarises the capacity for additional retail floorspace across the borough up to 2021:
- 14,024 sq m of comparison floorspace within Bridgend

- 16,400 sq m of bulky goods floorspace across the borough but very little capacity in Bridgend town centre
- No capacity for new convenience floor space in Bridgend town centre.

### Retail uses in established centres

- 2.3.6 The distribution of shopping facilities in Bridgend fits within the wider regional hierarchy. Cardiff and Swansea are the highest order centres within the regional hierarchy, and both are located outside of the county borough.
- 2.3.7 The LDP identifies four Strategic Regeneration Growth Areas (SRGAs) as the focus for housing, retailing and employment growth within the borough. The four SRGAs are identified in the borough-wide settlement hierarchy (Policies SP1 and PLA1) as follows:
- i. Bridgend (Primary Key Settlement)
  - ii. Porthcawl (Main Settlement)
  - iii. Maesteg (Main Settlement) and Llynfi Valley
  - iv. The Valleys Gateway Settlements (Main Settlement).
- 2.3.8 Pyle/Kenfig Hill/North Connelly is also recognised as a main settlement within policy PLA1. Other settlements outside SRGAs (local service centre and small centres) are recognised as being suitable for development commensurate with their existing scale and function.
- 2.3.9 The LPD identifies town and district centres for the primary focus for retailing, culture and leisure activities. The LDP strategy directs new development to these centres in accordance with their role in a defined retail and commercial hierarchy. Policy SP10 defines the borough's retail and commercial hierarchy at the borough level. The hierarchy is reproduced in **Table 2.3** below.

Table 2.3 Retail and commercial hierarchy

Designation	Settlement(s)
Sub regional centre	Bridgend
Town centres	Maesteg and Porthcawl.
District centres	Aberkenfig (Valleys Gateway); Kenfig Hill; Ogmores Vale; Pen-coed; Pontycymmer and Pyle.
Local service centres	Bettws North; Bettws South; Blackmill; Blaengarw; Brackla; Broadlands; Bryntirion; Caerau; Laleston; Nantymoel; North Connelly; Nottage; Pontrhydcyff; Sarn; Verlands Court (Pen-coed); Wildmill and Five Bells Road (Bridgend).

- 2.3.10 Paragraphs 5.2.2 to 5.2.6 of the LDP explain the role of centres within the retail and commercial hierarchy.
- 2.3.11 As the sub regional town centre, Bridgend contains the largest number and widest range of shops, services and leisure and is the principle shopping centre for much of the county borough and some communities outside.

- 2.3.12 The smaller town centres at Maesteg and Porthcawl offer a wide range of shops and facilities, including a medium sized convenience offer to meet the needs of their immediate catchment areas.
- 2.3.13 District and local centres usually contain a small supermarket and range of services which serve a smaller, more limited catchment area. These centres primarily provide only essential goods available for ‘top up’ shops.
- 2.3.14 In terms of managing development within designed centres, Policy SP10 stipulates that new retail or other commercial development should provide active ground floor uses and be of a suitable scale for the centre within which it is located; having regard to its position in the retail hierarchy.
- 2.3.15 Policy REG6 seeks to minimise the loss of ground floor retail uses within the primary shopping areas of Bridgend, Porthcawl and Maesteg to ensure that these centres maintain a ‘critical mass’ of retail units and function as viable shopping centres.
- 2.3.16 The LDP recognises that change of use is preferable to long term vacancies in centres which have limited prospects of attracting new commercial investment. Policy REG7 makes provision for the change of use from A Class uses to other uses outside of designated primary shopping areas. However, Policy REG8 stipulates that B2 and B8 uses will not be permitted on ground floor frontages in retail and commercial centres under any circumstances.

### Retail uses outside established centres

- 2.3.17 In terms of assessing proposals for new retail and office development outside of designated centres, Policy SP10 states that:

*‘New out-of-centre retail and office development should be developed as a result of an identified need and sequential test of sites and should not be of a scale and type which would adversely affect the vitality, viability and attractiveness of the retailing and commercial centres.’*

- 2.3.18 Policy REG5 states that proposals resulting in the loss of commercial and retail floorspace outside of designated centres will only be permitted where *there is sufficient alternative provision locally or where the premises has been vacant for at least 2 years and has been actively marketed over that time.*”
- 2.3.19 Policy REG5 states that proposals for new small-scale, local convenience and comparison goods retailing and services will be permitted where a local need has been identified, either through new residential development, part of comprehensive mixed-use developments (see Policy PLA3) or in existing areas of under-provision.

### Retail and commercial development sites

- 2.3.20 Policy REG5 identifies seven sites for new small-scale, local retail development as set out in **Table 2.4** below:

Table 2.4 REG5 sites

Location	Development type	Size/(net)
Parc Derwen, Bridgend	New district centre (mix of A1,A2,A3,D1,D2)	Up to 3,000 sq m

Location	Development type	Size/(net)
North East Brackla Regeneration Area, Bridgend	New local service centre (mix of A1,A2,A3,D1,D2)	Up to 450 sq m
Parc Afon Ewenni, Bridgend	New local service centre (mix of A1,A2,A3,D1,D2)	Up to 2,000 sq m
Ewenny Road, Maesteg	New local service centre (mix of A1,A2,A3,D1,D2)	Up to 1,000 sq m
Ogmore Comprehensive School, Bryncethin	Small-scale convenience goods provision	Up to 100 sq m
Gateway to the Valleys, Tondu	Small-scale convenience goods provision	Up to 100 sq m
Bryncethin Depot, Bryncethin	Local convenience goods store	Up to 1,500 sq m

2.3.21 Policy REG5 allocates up to 8,150 sqm floorspace for new small-scale, local retail facilities across the borough in total. Outline planning applications have been submitted for the development of all new commercial centres except for Ewenny Road. A summary of progress at the time of writing this study (April 2019) is set out below:

- Parc Derwen– A Masterplan and Development Brief were prepared for the site in 2001 and 2005 respectively. The indicative plans included 1.8 ha of land identified for a new centre including community, commercial and residential uses. An outline application including an unspecified amount of commercial floorspace was approved in 2007. Only residential development has been delivered on the site to date.
- North East Brackla Regeneration Area – A Hybrid application was granted for 230 dwellings, including 0.3 ha of land for A1 and A3 uses in November 2014. Development of residential aspects have now commenced on site.
- Parc Afon Ewenni - Received outline planning permission for 240 dwellings, public open space and 1,123 sq m of A1, A2, A3, D1 and D2 uses in March 2018. No reserved matters applications have been submitted to date.
- Ewenny Road – BCBC have confirmed a resolution to grant outline consent for up to 138 dwellings, 2,675 sqm of A1 & A3 uses and 3,252 sqm of B1 use was made in May 2016 but the applicant has not completed the s106.
- Ogmore Comprehensive School – Full planning permission for 117 dwellings was granted in August 2016 but no retail floorspace is proposed in the development.
- Gateway to the Valleys – No retail applications submitted to date.
- Bryncethin Depot – No retail applications submitted to date.

2.3.22 Policy REG9 promotes the redevelopment of vacant premises/sites in established centres for a mix of retail, office, leisure or other commercial uses. Although it does not allocate a specific amount of floorspace for most sites, Policy REG9 identifies eight sites for redevelopment:

- 'Southside' - Land at the Brackla Centre, Cheapside, Police Station and the Surface Car Park, Bridgend – Received full planning permission for the part demolition of the existing shopping centre and construction of a new retail centre in 2007. This part of the site now forms the Bridgend Retail Centre. There have been no applications on the part of the site forming the police station and surface car park to date.
- 'Riverside' - Land at Rhiw Car Park – The car park has been redeveloped alongside a new Gymnasium.
- The Embassy Cinema Site and adjacent land - The site has been in use as a temporary car park since 2002.
- Elder Yard – The Elder Street area has been redeveloped in line with planning permission granted in 2010 for a change of use at Victoria Inn from A1 to A3, new retail and office units at the former car park to the south of Elder Street and public realm improvements.
- Land North of Market Street, Bridgend – Subject to multiple change of use planning applications including A3 to A1 uses at 33 Market Street, and Sui Generis to A3 uses at 31a Market Street.
- Porthcawl Waterfront Regeneration Area – Subject to an allocation for a new retail convenience store up to 2,500 sq m at the former Salt Lake Car Park. The earliest date for anticipated development is summer 2021<sup>1</sup>.
- Former Surgery Site, Coychurch Road, Pencoed – Part of the site has been redeveloped to accommodate a new 260 sq m pharmacy and residential flats. The remaining part of the site has now been purchased with the intention of providing further residential development.
- Outdoor Market, Bus Station and Riverside, Maesteg – The former outdoor markets have now been demolished and redeveloped alongside improvements to the public realm and bus facilities.

2.3.23 Policy REG10 focuses new out-of-centre retail development in the locations listed in **Table 2.5**:

Table 2.5 REG10 sites

Address	Existing uses	Location
Bridgend Retail Park	Bulky Comparison & Convenience	Out of centre
Waterton Retail Park	Bulky Comparison	Out of centre
Sainsbury, Cefn Hirgoed	Convenience	Out of centre
Tesco, Brewery Lane	Convenience	Edge of centre
Tesco, Llynfi Lane, Maesteg	Convenience	Edge of centre
Bridgend Designer Outlet Village	Controlled by s106	Out of centre

<sup>1</sup> BCBC Report to Cabinet, 20 November 2018.

- 2.3.24 The unique role of the McArthur Glen Designer Outlet in Bridgend is recognised within the LDP (paragraph 5.2.19) which notes that that BCBC will need to be convinced that any further development will not undermine the role of established town centres.
- 2.3.25 Policy REG11 directs new out-of-centre bulky comparison retail development to the locations listed in **Table 2.6**:

Table 2.6 REG 11 Sites

Address	Location	Floorspace (net)
Ewenny Road, Maesteg	Out-of-Centre	5,400 sq m
North East Brackla Regeneration Area, Bridgend	Out-of-Centre	4,500 sq m
Brewery Field, Bridgend	Edge-of-Centre	5,500 sq m

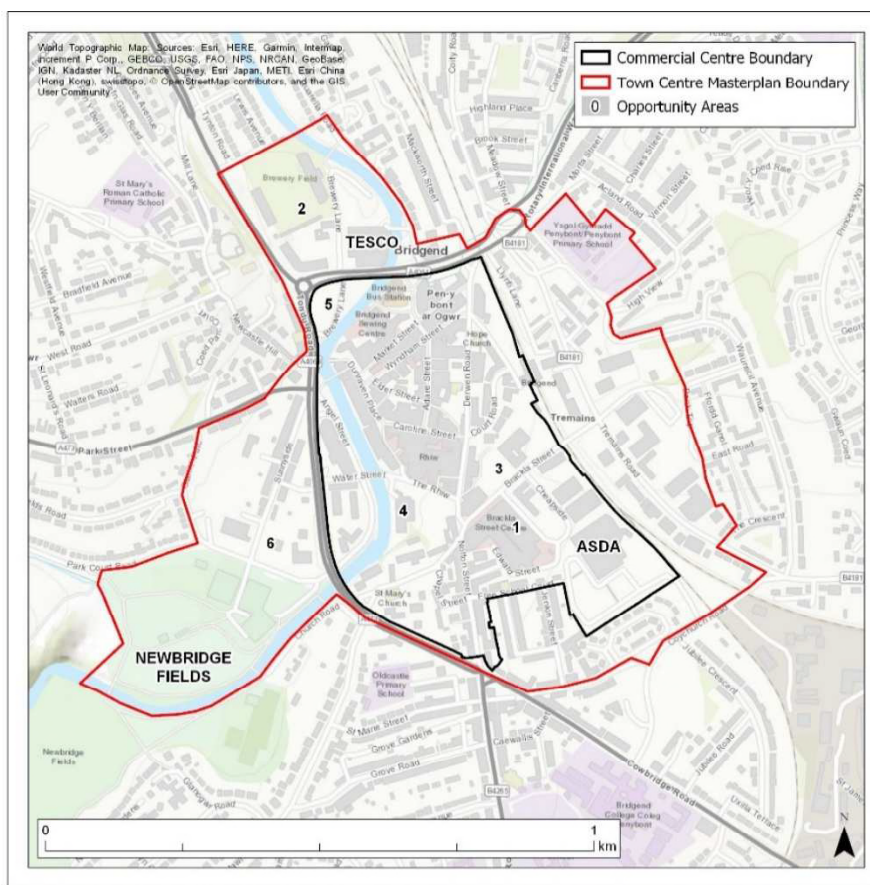
- 2.3.26 Policy REG11 allocates up to 15,400 sqm bulky comparison retail floorspace across the borough in total. Ewenny Road and North East Brackla Regeneration Area are both allocated as mixed-use development areas under Policy PLA3 and identified as suitable sites for new small-scale, local retail development under Policy REG5 (see Table 2.4).

## 2.4 Bridgend Town Centre Masterplan (2011)

- 2.4.1 As noted above, the adopted Bridgend LDP is supported by the Masterplan, which sets out the future development and management framework for Bridgend town centre. Its purpose is to ensure that Bridgend builds on its many strengths, so that alongside recent investment, there is a catalyst for future growth that ensures its competitiveness as a retail centre and delivers a vibrant and busy, family-friendly destination.
- 2.4.2 The Masterplan contains indicative development strategies for five opportunity areas in the core town centre area which are also allocated for redevelopment under LDP policies REG 9 and REG10(4) (sites 1-5). The Masterplan contains a development strategy for Angel Street Area on the periphery of the core town centre area (site 6). Figure 2.1 identifies the location of sites 1-6 relative to the designated centre boundary.



Figure 2.1 Town Centre Masterplan Opportunity Areas



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2.4.3 The indicative development strategies for sites 1-5 are summarised in **Table 2.7**.

Table 2.7 Masterplan opportunity areas

Opportunity area	Indicative strategy
1. The Brackla Street Centre/Cheapside	<ul style="list-style-type: none"> <li>– No more than 10,000 sq m of retail floor space</li> <li>– Unlikely to be anchored by a department store, but more based around fashion retail and a series of key tenants</li> <li>– Opportunity to accommodate leisure and A3 uses</li> </ul>
2. Tesco, Brewery Field Area	<ul style="list-style-type: none"> <li>– Retain as predominantly sporting/leisure venue outside of the centre boundary</li> <li>– Improve physical linkages to the centre and river frontage</li> <li>– Deliver small scale commercial development</li> </ul>

Opportunity area	Indicative strategy
3. Surface Car Park/Telephone Exchange Area	<ul style="list-style-type: none"> <li>– Dependent on new access road</li> <li>– Could be integrated into Brackla Street Centre/Cheapside</li> </ul>
4. The Rhiw Multi-Storey Car Park	<ul style="list-style-type: none"> <li>– Enhancement of the car parking spaces and the internal layout of the car park</li> <li>– Change of use at the car show room at Nolton Street if the site becomes available</li> <li>– Opportunity for additional office or leisure uses on the river front</li> </ul>
5. The Embassy Site	<ul style="list-style-type: none"> <li>– Improve riverside setting</li> <li>– Provide complimentary uses to the centre (hotel, offices, residential or leisure)</li> <li>– Improve pedestrian linkages to the centre</li> </ul>

## 2.5 Summary

- 2.5.1 At the national level, PPW is clear that LDPs should set out a vision for how land-uses will change to accommodate development needs over a plan period including retail. These policies should guide and manage retail centres based on a robust assessment of qualitative and quantitative need.
- 2.5.2 The LDP sets the direction for growth in all of the centres in the county borough from sub-regional centre down to local service centres and defines key regeneration priorities throughout the borough. The LDP further establishes a retail hierarchy and the adopted proposals map defines centre boundaries including primary retail areas. The LDP also provides the development management policies affecting retail development proposals within the county borough.
- 2.5.3 The LDP does not set a total retail floorspace requirement at borough level but instead directs new retail to specific locations through strategic policies up to 2021, namely:
- Up to 6,450 sq m of new retail and commercial floorspace through the creation of four new district and local service centres - Policy REG5;
  - Up to 1,600 sq m of new convenience goods provision outside of existing centres - Policy REG5); and,
  - 15,400 sq m of new bulky goods comparison retail development outside of retailing and commercial centres - Policy REG 11; and
- 2.5.4 The LDP also identifies key locations for redevelopment of vacant units/sites within existing centres, and expansion of retail floorspace outside of existing centres (policies REG9 and REG10). Further details of the aspirations for REG9 and REG10 sites in Bridgend are included in the Masterplan.



## 3 Profile of Bridgend County Borough's Centres

### 3.1 Introduction

3.1.1 This section provides a review of the current role and function of designated centres in BCBC. The analysis is informed by health checks of the sub-regional, town and district centres undertaken by PBA in January 2019 which are provided in full at Appendix B. BCBC prepared health checks of the local centres which are also provided in full at Appendix B.

### 3.2 Sub-regional centre

3.2.1 Bridgend is centrally located within the borough and is the only centre with a sub-regional function.

3.2.2 In line with its status, Bridgend provides a greater range of retail shops including a large number of independent retailers alongside multiple retailers. The main shopping streets in the pedestrianised core include Caroline Street and Adare Street and Nolton Street outside. There are two shopping centres in Bridgend; the Rhiw Shopping Centre and Bridgend Shopping Centre.

3.2.3 The centre provides a good range of retail shops and complimentary services. The food and drink offer comprise mostly independent cafes, restaurants, public houses and takeaways with a few national operators (Costa and Domino's Pizza). Other leisure uses in the centre include gyms, an amusement arcade and nightclubs. However, there are some gaps in the leisure offer; the nearest multiplex cinema is the Odeon next to the McArthurGlen Designer Outlet, Bridgend.

3.2.4 The comparison shopping offer together with the presence of leisure uses enhance the attraction of Bridgend and contribute its sub-regional function. The household survey shows that residents travel from smaller centres to access a wider range of goods and services in Bridgend. The centre is highly accessible and is equipped with centrally located bus and rail stations with regular services to and from surrounding district and local centres.

3.2.5 **Table 3.1** summarises the diversity of uses in Bridgend centre and the UK average.

Table 3.1 Diversity of uses in Bridgend

Category	No. of units	% of units	UK national average (% of units)	Floorspace (sqm)	Floorspace (%)	UK national average (% of floorspace)
Convenience	19	5	10	12,354	8	19
Comparison	84	22	37	19,563	13	43
Services	215	57	39	109,701	70	26
Vacant	60	16	13	9,280	6	12
Total	377	100	100	150,897	100	100

Source: GOAD/BCBC

3.2.6 The proportion of units occupied by comparison and convenience shops combined in Bridgend is just 27% compared to a national average of 47% for centres across the UK.

3.2.7 Bridgend has around half the UK average level of convenience goods (5% of all units and 19% of overall floor space), this represents a small increase from the previous 2012 survey

(three additional units). This pattern is not consistent with the two defined town centres, Porthcawl and Maesteg, which show strong correlation to the UK average. The perception of a limited convenience offer in Bridgend's centre is skewed by the large edge-of-centre Tesco (Reg 10(4)) excluded from the figures in **Table 3.1**.

- 3.2.8 There has been a large reduction in the number of comparison retail units in Bridgend since the previous 2012 Retail Study. The proportion of comparison units has reduced from 25% in 2012 to 22% in 2019, representing a loss of 16 units. The proportion of comparison units in Bridgend is significantly below the UK average of 37% and this is a common trend across most of the borough's centres.
- 3.2.9 The proportion of service units in Bridgend has not changed notably since 2012. In 2019 services represent 57% of units and 70% of total floorspace in the centre. This exceeds the UK average figures of 39% of units and 26% of floorspace. The high proportion of services is also a common trend in the county borough's town centres where more than 50% of units are occupied by service retailers.
- 3.2.10 The number of vacant units in Bridgend has reduced since 2012. However, at 16% the vacancy rate in Bridgend is still above the Welsh<sup>2</sup> and UK-wide average (13%) and higher than in Maesteg (6%) and Porthcawl (5%) town centres.
- 3.2.11 There is the opportunity to consolidate primary shopping areas to address long-term high vacancy rates within the town centre and enhance a central feeling of place. Such an existing opportunity exists at Nolton Street, which could also be discounted as a primary shopping area due to its limited A1 retail offer and predominance of retail services.
- 3.2.12 There is also the potential to consider greater flexibility outside of primary and secondary shopping areas at the periphery of the existing centre, where A1, A2 and A3 uses are unlikely to be forthcoming due to the form of existing building stock. Specific opportunities exist at Station Hill which benefits from close proximity to the railway station and may be more suitable for employment uses subject to residential amenity.
- 3.2.13 Most allocated Policy REG9 sites have now been fully or partially redeveloped except for the Embassy Cinema Site which has now been in long term use as a temporary carpark. It is unclear whether this site will come forward for retail or complimentary use in the near future, however, the site still plays a strategic function within the centre as a car park within an accessible gateway location.

### 3.3 Town Centres

- 3.3.1 Aside from Bridgend, the main towns in BCBC comprise Maesteg and Porthcawl. Maesteg town centre is in the north of the county borough and lies approximately 13km north east of Bridgend. Porthcawl is located on the South Wales coastline and lies approximately 9km to the west of Bridgend.
- 3.3.2 Maesteg is the principal settlement of the Llynfi Valley and benefits from a direct train route to Bridgend rail station which connects it to the wider national rail network. Maesteg has been the focus of regeneration efforts evidenced in its recently improved bus station and outdoor markets.
- 3.3.3 Porthcawl has been the focus of long-established plans for tourism-led regeneration focused along the waterfront. Porthcawl benefits from primary road connections to the wider strategic road network (the M4).

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<sup>2</sup> Welsh town centre average derived from town centre data from Retailing in Wales' largest towns and cities, LDC and WISERD (2018).

3.3.4 **Table 3.2** shows the diversity of uses in each town centre.

Table 3.2 Diversity of uses in town centres

Town Centre	Convenience		Comparison		Service		Vacant		Total
	No. units	% units	No. units	% units	No. units	% units	No. units	% units	
Maesteg	15	9	49	29	96	56	10	6	170
Porthcawl	18	9	58	28	118	58	11	5	205
UK Average	-	10	-	37	-	39	-	13	-

Source: GOAD/BCBC

- 3.3.5 Maesteg and Porthcawl contain a similar mix of uses. The proportion of convenience units in both centres is in line with the UK average figure (around 10%). Both centres also have a higher percentage of services, and a lower percentage of comparison retailers than the UK average. This trend is also found in Bridgend sub-regional centre.
- 3.3.6 The vacancy rate in both town centres is approximately half that of both the Welsh and UK-wide average of 13%.
- 3.3.7 Maesteg has experienced a reduction in vacancy rates since 2012 and an associated increase in the number of convenience, comparison and service units. Between 2012 and 2019 the total number of vacant units decreased from 13 to 10. This improvement can be partially attributed to the regeneration of the town markets and bus station (Policy Reg 9(8)). The most significant change is the growth of the comparison offer; the number of comparison units increased by around 5% (12 units) since the previous 2012 study.
- 3.3.8 Porthcawl has also experienced a moderate increase in its convenience (5 additional units) and service offer (5 additional units) since 2012. However, unlike Maesteg, Porthcawl has seen a reduction in the number of comparison units and the vacancy rate has remained stable since 2012. Between 2012 and 2019 the total number of comparison units decreased by 9 units (15%). This suggests the loss of comparison units may have been absorbed into the service and convenience markets.
- 3.3.9 There is potential to diversify the range of services and enhance the night time economy in Maesteg by expanding the food and drink offer. Our research has identified that national brewery Marston's Plc has a current requirement for premises in Maesteg. The Original Factory Shop on Castle Street is expected to soon become vacant as part of a programme of national closures for the company and BCBC has received a pre-application enquiry for the redevelopment of the site for residential use. However, the store could also provide a potential opportunity for a new retailer within the centre.
- 3.3.10 The wider Maesteg settlement is anticipated to be affected by the delivery of a new local centre at nearby Ewenny Road (Policy Reg 5(4)). The officers report on the existing outline resolution to grant concludes that this new centre would not be detrimental to the vitality and viability of the main town centre.
- 3.3.11 The proposed regeneration of Porthcawl waterfront (Policy Reg 9(6)) and existing interest from retailers means there is an opportunity to secure further investment in public realm improvements in Porthcawl.

3.3.12 Some substantial improvements to Porthcawl’s waterfront leisure offer have already been delivered or received planning approval which have the potential to increase retail spending elsewhere in the centre by enhancing the attraction of Porthcawl to visitors and residents including:

- the Jennings Building has already been restored, opening in September 2017 and including new homes, three restaurants and 14 live/work units
- the Porthcawl Maritime Centre was approved in November 2018 including new Class A3 restaurant units
- the Watersports Centre was also approved August 2017.

### 3.4 District centres

3.4.1 Below the level of towns, the county borough has six smaller district centres: Aberkenfig, Kenfig Hill, Ogmores Vale, Pencoed, Pontycymer and Pyle. **Table 3.3** below shows the diversity of uses in each district centre. The location of the district centres is shown on the study area map at **Appendix A**.

Table 3.3 Diversity of uses in district centres

District Centre	Convenience		Comparison		Service		Vacant		Total
	No. units	% units	No. units	% units	No. units	% units	No. units	% units	
Aberkenfig	5	9	14	25	30	35	7	8	86
Kenfig Hill	2	4	9	20	29	64	5	11	45
Ogmores Vale	1	3	3	8	25	66	9	24	80
Pencoed	6	8	10	14	49	69	6	8	71
Pontycymer	2	3	12	18	26	39	11	17	51
Pyle	3	9	14	42	16	48	0	0	33
UK Average	-	10	-	37	-	39	-	13	-

Source: GOAD/BCBC

3.4.2 **Table 3.3** shows that the size of the county borough’s district centres varies considerably ranging from 33 units in the compact centre of Pyle to 86 units in Aberkenfig. This reflects the varying role and function of these centres as well as other factors including: the proximity to other centres, visibility on main arterial routes, the level of residential population locally and limitations of the built environment due to the historic layout and configuration of the shop units.

3.4.3 District centres in the Ogmores and Garw Valleys (Ogmores Vale and Pontycymer) and Kenfig Hill have a relatively limited convenience offer with less than half the UK average level of convenience units. This reflects the relatively low population density in the Ogmores and Garw Valleys and the location of a large supermarkets nearby.

- 3.4.4 Pontycymer appears to be heavily reliant on the Cooperative Food Store as its anchor store. Similarly, Ogmores Vale has lost two convenience active units since the previous 2012 study and is now dependent on a Nisa Convenience Store for the whole of its central offer. Kenfig Hill's level of convenience offer is likely affected by its proximity to the Asda supermarket located less than a mile away within Pyle District Centre.
- 3.4.5 Other centres all achieve just below the UK average proportion of convenience retailers, however, appear relatively healthy. Aberkenfig has a large proportion of national multiple convenience retailers grouped together to the west of the main high street. This is due partly to its strategic location at the edge of Bridgend which makes the centre accessible to the wider network via the M4, A4063, A4063 and A4046. Pencoed also has a strong national multiple presence, with Cooperative Food and Tesco Express stores both located within the centre. Pyle's centre is comparatively small, however has a large proportion of convenience floor space (29% compared to the UK average of 19%) due to the presence of a large Asda Supermarket at its core.
- 3.4.6 The comparison offer across district centres is lower than the UK average of 37%, this is generally counterbalanced by the proportion of service offer which, except for Pontycymer, is above the UK average of 39%. The provision of comparison goods has remained relatively stable since the previous 2012 study with minor increases at Ogmores Vale (1 unit) and Pencoed (1 unit). Similarly, the provision of services has generally remained stable or shown minor growth, except for Pontycymer which has lost three service units since the 2012 study.
- 3.4.7 The Ogmores and GarwValley's district centres are noticeably struggling, with high vacancy rates above both the national average (13%) and the district centre average (11%). Of these two centres, Ogmores Vale is struggling the most with around one in four retail units being vacant. The level of vacant buildings has a noticeable effect on these centres which was picked up on in health checks (Appendix B). Other centres perform above the national average, with vacancy rates varying from 11% at Kenfig Hill to 0% at Pyle.
- 3.4.8 Many of the centres suffer from the breaking up of retail areas, which leads to the lack of a distinct feeling of central space. This is most noticeably the case in Pontycymer and Ogmores Vale where some vacant units have begun to fall into disrepair. However, also noticeable in Aberkenfig and Kenfig Hill where there are large breaks in retail areas as a result of intermittent groupings of residential uses along main high streets.
- 3.4.9 Development opportunities within the district centres are generally more limited due to their proximity to established residential areas. Most opportunities are for the redevelopment of areas within the centre rather than potential expansion. Due to the lack of interest in some centres there is likely to be further contraction to avoid the possibility of long term-vacant units. In such instances there may be the opportunity to redevelop flexible mixed-use or residential units which would still allow for future retail conversion.

### 3.5 Local centres

- 3.5.1 BCBC prepared health checks to assess how the 17 local centres in the county borough perform in terms of meeting the day to day shopping and service needs of local communities. Each centre was classified as either being in good health, as underperforming with some opportunities for further improvement or as being in poor health with more urgent need for improvement. The results of this exercise are summarised below:
- Good health: Bettws (North), Blackmill, Brackla, Broadlands, Bryntirion, Five Bells Road, Laleston, Nantymoel, North Cornelly, Llangynwyd, Rest Bay, Sarn, Verlands Court (Pencoed) and Wildmill,
  - Underperforming: Bettws South and Caerau
  - Poor health: Blaengarw

3.5.2 As can be seen from the above summary, only one local centre, Blaengarw, was assessed as being in poor health due to prevalence of vacant units with no clear opportunities for further investment. Most existing local centres are in good health which indicates that the designated network of local centres meets the needs of local communities across the county borough overall. Therefore, no changes are proposed to current network of designed local centres.

### 3.6 Summary

3.6.1 **Table 3.4** summarises the key findings of the health check assessments undertaken by PBA for designated centres in BCBC and identifies key opportunities for change in each centre.

Table 3.4 Summary of centre health checks and opportunities

Centre	Health check recommendation	Opportunities for change
Bridgend	Good health	<ul style="list-style-type: none"> <li>– Consolidate retail uses along primary frontages to improve environmental quality and footfall.</li> <li>– Redevelop prominent vacant buildings (incl. the former York Café Bar on York Street / Wyndham Street).</li> <li>– Expand the range of leisure uses to enhance the evening economy.</li> </ul>
Maesteg	Good health	<ul style="list-style-type: none"> <li>– Provide additional leisure uses to enhance the evening economy.</li> </ul>
Porthcawl	Good health	<ul style="list-style-type: none"> <li>– Improve pedestrian connectivity between New Road and John Street.</li> <li>– Improve visitor facilities to attract increased tourist spending in the town centre.</li> <li>– Increase consumer choice in the convenience sector, particularly for main food shopping.</li> <li>– Provide new retail units and complementary commercial/tourism uses on vacant edge of centre development sites.</li> </ul>
Aberkenfig	Good health	<ul style="list-style-type: none"> <li>– Provide additional pedestrian crossing points and signage to improve pedestrian linkages to Pentre Felin Retail Park and nearby open green space.</li> </ul>
Kenfig Hill	Good health	<ul style="list-style-type: none"> <li>– Provide additional crossing points along Commercial Street to improve pedestrian linkages to Pysgah Car Park and nearby open green space.</li> </ul>
Ogmore Vale	Underperforming	<ul style="list-style-type: none"> <li>– Redevelop vacant units/sites in the centre for retail or alternative uses.</li> <li>– Improve visitor facilities to increase tourist spending in the centre.</li> </ul>
Pencoed	Good health	<ul style="list-style-type: none"> <li>– Improve step free access for wheelchair and pushchair users.</li> </ul>

Centre	Health check recommendation	Opportunities for change
Pontycymer	Underperforming	<ul style="list-style-type: none"><li>– Redevelop vacant units along Oxford Street for retail or alternative uses.</li></ul>
Pyle	Good health	<ul style="list-style-type: none"><li>– Improve pedestrian links to Asda from Ffald road.</li></ul>

### 3.7 Key findings

- Bridgend is the largest centre in the county borough, providing a wide range of retail shops including large number of independents and multiple retailers.
- Bridgend town centre has retained a consistently high vacancy rate since the last retail study in 2012.
- Bridgend town centre has a high level of service provision in comparison to the UK national average (57% compared to 39%), a trend repeated across BCBC's town and district centres.
- The average vacancy rate in town centres is below the national average (5% compared to 13%).
- BCBC's two district centres have a lower level of convenience provision than the UK average (9% compared to 10%) and a moderately lower level of comparison goods (28% compared to 37%). This considered, Maesteg's comparison offer has grown strongly by 5% since 2012.
- The average convenience retail offer in district centres within the BCBC area is below the UK average (6% compared to 10%); this number is skewed downwards by the two Ogmore and Garw Valley centres which have a marginal level of convenience retailers (3%).
- Comparison retail provision across the borough is noticeably below the UK average (37%) with the only exception of the smallest district centre, Pyle (42%).
- The vacancy rate in most district centres is aligned with the UK average except for centres in the Ogmore and Garw Valleys (Ogmore Vale - 24% and Pontcymmer - 17%) which have a significantly higher level of vacant units than the UK average of 13%.
- The opportunities within existing centres are primarily focused on condensing or redeveloping existing retail building stock to regenerate or improve retail environments and active travel.
- Most designated local centres fulfil their role in terms of meeting the needs of local communities and no changes are proposed to the existing network of local centres.



## 4 Market and economic trends

### 4.1 Introduction

4.1.1 This study is being prepared during a period of renewed focus on the changing role and function of town centres. The traditional role of town centres has been undermined by a combination of the continued attraction of out-of-town retail destinations, the increased popularity of internet shopping, the most recent economic downturn and associated decline in expenditure growth. This section outlines the key trends affecting the retail sector and town centres and summarises the headline economic forecasts which feed into the quantitative retail assessment presented in **Section 6**.

### 4.2 Background

4.2.1 Since the economic downturn in 2009, multiple independent studies considering the future role and function of town centres across the UK have been published. Most notable of these are:

- The Portas Review (2011), Mary Portas
- Beyond Retail: Redefining the Shape and Purpose of Town Centres (2013) British Council of Shopping Centres
- 21st Century High Streets (2013), British Retail Consortium
- Digital High Street 2020 Report (2015), Digital High Street Advisory Board
- The Grimsey Review 2 (2018), Bill Grimsey

4.2.2 These studies set out measures to encourage investment in struggling town centres and level the playing field between physical ‘bricks and mortar’ and online retail businesses. The specific recommendations from each report are summarised below.

#### The Portas Review

4.2.3 In May 2011, retail expert Mary Portas was appointed by the Government to lead an independent review into the future of the high street in response to the decline of town centres nationally, seen as a consequence of reduced spending on the high street. The report supported the call to strengthen planning policy in favour of ‘town centre first’ and includes 27 separate recommendations to tackle the further decline of the high street.

4.2.4 The core recommendations included measures to strengthen the management of high streets, improvements to the business rates system, reducing car parking charges, placing greater onus on landlords to proactively manage their assets or face the use of compulsory purchase powers by local authorities, and to increase community involvement in town centres.

4.2.5 The Government published its formal response to the Portas Review in 2012, which accepted virtually all the recommendations and secured funding for 24 ‘Portas Pilot’ towns to trial the recommendations. The Government established the future High Street Forum to implement Portas’s recommendations and provided funding to establish business improvement districts (BIDs) and a ‘Future High Street X Fund’ (renamed the High Street Renewal fund) to reward towns delivering innovative plans to rejuvenate their town centres.

#### Beyond Retail

4.2.6 Following the Portas Review, the Government supported the establishment of an industry task force to analyse retail property issues relating to town centres. The findings of the task force’s

report were presented in the Beyond Retail report. One of the report's key observations was that the trend towards market polarisation has resulted in three broad types of town centre offer: strong centres with a wide retail and leisure offer; convenience food and service-based centres with an element of fashion and comparison goods; and, localised convenience and everyday needs focused centres. The report makes the following recommendations:

- Strong and dynamic leadership, led at the local authority level also including business and community involvement, to bring about long-term change in town centre functions
- Undertake bold, strategic land assembly, to assemble redevelopment opportunities of scale and worth
- Provide greater flexibility in the planning system to enable redundant retail premises to be converted to 'more economically productive uses'
- Consider the mechanisms to address funding gaps to encourage local authorities to commit to long-term planning for town centres
- Town centres must take advantage of technology to assist in marketing, driving footfall, and assisting independents and SMEs
- Review of the business rate system and publishing of new retail valuation guidance.

## 21<sup>st</sup> Century High Streets

4.2.7 In 2013, the British Retail Consortium published the second '21st Century High Streets' report as an update to its original report in 2009. This sets out key policy recommendations to help secure 'flourishing 21st Century high streets' under six key topics:

- A unique sense of place: Local partnerships, authorities and retailers must create a brand for the town centre to engender consumer loyalty through differentiation and informative marketing
- An attractive public realm: Local partnerships and authorities must actively manage the public realm creating attractive public spaces
- Planning for success: Local authorities should develop a clear strategic vision focused on the role of the town centre and cooperate with neighbouring authorities to maintain viable and complimentary retail destinations
- Accessibility: Local authorities should manage accessibility holistically and responsively and should provide adequate parking to assist in driving footfall
- Safety and security: Local police should work with retailers to better understand the impacts of retail crime to promote town centres as safe, secure and effectively managed trading locations and
- Supportive regulatory and fiscal regimes: Central government should reform the Business Rate Multiplier to reduce the cost of operating and investing in town centres.

## Digital High Street Report

4.2.8 The Digital High Street Advisory Board was established following the work of the Future High Streets Forum to consider the revolutionary impact of digital technologies on future success of high streets. The report published in 2015 makes four principal recommendations that are critical to revitalise high streets in context of a digitally dominated world. These include:

- Internet infrastructure: raise connectivity standards for residences and business by 2020. Provide consistent public access WIFI for consumers between different venues to assist the deployment of digital technology
- Digital skills: eliminate ‘digital skills gap’ in communities among residents, employees and business owners and
- High street digital lab: create a central resource for digital training programmes and widely available digital technology. Adopt the high street digital health index as a method for the Government to assess the competitiveness of town centres, measure the economic value creation from digital developments, set goals for digital integration and inspire local governments and enterprises to adopt digital technologies.

## The Grimsey Review 2

- 4.2.9 Bill Grimsey, the former managing director of Wickes and Iceland, published his original 2013 report as an alternative response to the recommendations of the Portas Review. The report includes 31 wide-ranging recommendations, including encouraging more people to live in town centres, appointing a High Streets Minister and freezing car parking charges for a year.
- 4.2.10 In 2018, Grimsey published an update on his previous report, reviewing the market changes since his initial report and making 25 recommendations to successfully shape the future of the high street. These recommendations include accepting the fact that there is an excess of retail space for the modern market, increasing local authority planning powers, introducing cheaper parking, and making smarter use of integrated technology within town centres. The four key findings include:
- There is a need for all towns to develop plans that are business focussed and focus on transforming town centres into community hubs incorporating health, housing, arts, education, entertainment, leisure, business space, as well as shops, while developing a ‘unique selling proposition’ (USP)
  - The key to success is leadership. Whether this is provided by elected mayors or the local authority bringing all stakeholders, including the community to develop and implement a plan for the location, strong leadership and vision are essential
  - The curating of a place based on its distinct heritage is multi-dimensional and complex but should feature strongly when developing the ‘offer’ and
  - Where we see genuine high street innovation, best practice is often not shared and far too many agencies remain in silos. There is a need for Economically Rational Areas to be established that can draw on the examples of Scotland and Wales to get things done. An independent body (not a membership organisation) is needed to support, question and signpost for local authorities and act as a driver for stakeholder support.

## 4.3 Market trends

- 4.3.1 This Section identifies key trends in the retail and leisure market which are likely to impact on the function and performance of town centres in the future. The key trends include:
- Polarisation
  - Restructuring of the convenience sector
  - Growth of commercial leisure sector
  - Effects of digital technology.

## Polarisation

- 4.3.2 Since the last economic downturn, a combination of factors has created a need for retailers to rapidly adapt their business strategies and store formats to changing economic circumstances. These factors include:
- Reduced consumer expenditure growth
  - Changes in customer requirements
  - Growth of internet and ‘multi-channel’ retailing.
- 4.3.3 The culmination of these factors resulted in a ‘polarisation trend’ in the comparison sector whereby retailers have increasingly concentrated trading activities within larger retail centres and out of town retail parks. As a result, there is a growing disparity between the comparison retail offer in larger centres (which generally continues to improve) and that within smaller centres (which generally experience decline in comparison retail provision).
- 4.3.4 Retailers have altered their business models in this way to compete with internet-based retailers which have significantly lower overhead costs. Operating a strategic network of large stores in larger centres with capacity to stock full product ranges provides greater efficiency compared to a network of smaller-format stores which offer a limited range of products. The growing popularity of multi-channel retailing means that many retailers now require fewer stores than before to reach their customer base. In 2011, Deloitte estimated that the polarisation trend could result in portfolio reductions of between 30 to 40% in the short to medium term in certain retail categories<sup>3</sup>. While click and collect purchases in town centres assist in providing activity in physical stores, this has not reversed the polarisation trend amongst multiple comparison retailers.
- 4.3.5 National retailers have become increasingly concentrated within the larger regional ‘top 100’ centres and the share of comparison retail sales conducted through town centre shops declined from 64% in 2002 to just over 40% by 2013<sup>4</sup>. The main beneficiaries of this trend have been out of town retail parks.
- 4.3.6 Retailers are increasingly looking to out-of-town retail parks to meet the demand for large format units. The retail warehousing market has seen increasing demand from traditional high street retailers since these units are considered best placed to serve the multi-channel customer. Key anchor retailers have continued to invest in new large format stores in out of centre locations such as John Lewis at Home and Next Home. These larger stores display their full range of products and provide click and collect facilities in accessible locations. Retail unit floorplates in town centres are generally more constrained.
- 4.3.7 Increased demand for out of centre floorspace has reduced vacancy levels down to pre-recession levels. Due to a shortage in new space, landlords are focusing on improving the quality of existing retail parks through refurbishment and the introduction of a greater range of uses, including leisure. As a result, retail parks are becoming destinations in their own right offering customers an enhanced shopping experience<sup>5</sup>. However, not all retail parks have prospered with a number of older and less accessible retail parks now being considered for residential redevelopment.
- 4.3.8 The retail development pipeline has slowed and 2012 saw the lowest quantum of new floorspace delivered in the UK since the 1990s. However, since 2012, multiple major new retail schemes have opened across the UK including Trinity Shopping Centre in Leeds owned by Land Securities in 2013; Old Market in Hereford owned by British Land in 2014; and, Grand

<sup>3</sup> Deloitte LLP, The Changing Face of Retail (2011)

<sup>4</sup> Peter Brett Associates, Investing in the High Street: Town Centre Investment Management (2013)

<sup>5</sup> Colliers International, Heading out of town-the changing landscape of the retail warehousing market (2016).

Central in Birmingham owned by Birmingham City Council in late 2015<sup>6</sup>. Openings in 2017 include the Lexicon in Bracknell (Bracknell Regeneration Partnership, Victoria Gate in Leeds (Hammerson) and Bond Street in Chelmsford (Aquila Holdings)<sup>7</sup>.

- 4.3.9 The scale and type of investment is different to that experienced during the ‘golden age’ of shopping centre development, between 1997 and 2007. In line with the polarisation trend, investment in new comparison retail floorspace is becoming increasingly concentrated in the larger city centres and regional shopping centres.

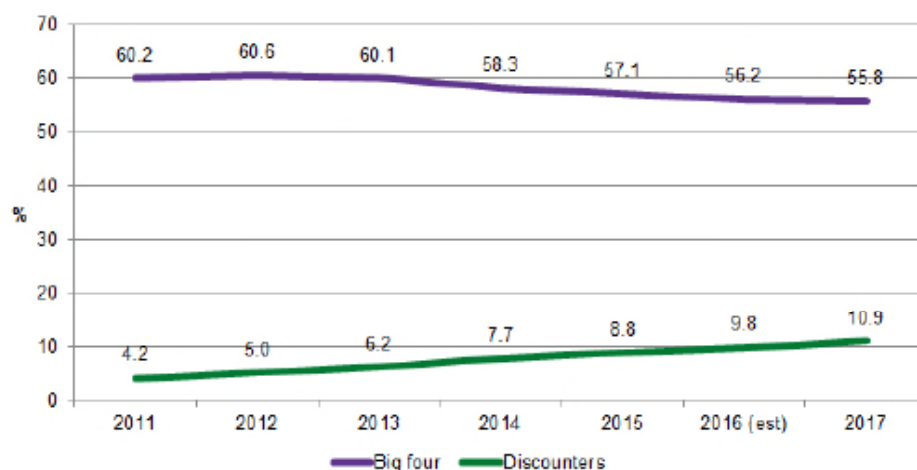
### Restructuring of the convenience sector

- 4.3.10 During the economic downturn, the convenience goods sector was a key driver of growth. This sector has traditionally been dominated by the ‘Big Four’ supermarket operators: Asda, Morrison’s, Tesco and Sainsbury’s and large food stores (2,300 sqm net) were the primary driver of growth in the sector. However, structural changes have taken place in the sector, as follows:

- Discount food operators: operators such as Aldi and Lidl have increased their market share of the convenience market significantly
- ‘C-format’ stores: major grocery retailers have expanded their network of smaller convenience stores to increase their market share (Tesco Express, Sainsbury’s Local and Little Waitrose) and
- Online shopping: the ‘race for space’ over the last decade has resulted in major operators investing in online grocery shopping to increase market shares.

- 4.3.11 Discount retailers market share of the convenience sector has increased in recent years partially at the expense of the ‘Big Four’<sup>8</sup> supermarket operators. **Figure 4.1** shows that the discounter’s market share of the grocery market increased by 6.7% between 2010 and 2017. Over the same period, the market share of the ‘Big Four’ supermarket operators contracted slightly.

Figure 4.1 UK market shares: the big four grocery multiples vs the discounters 2010-2017



Source: Office for National Statistics/Mintel

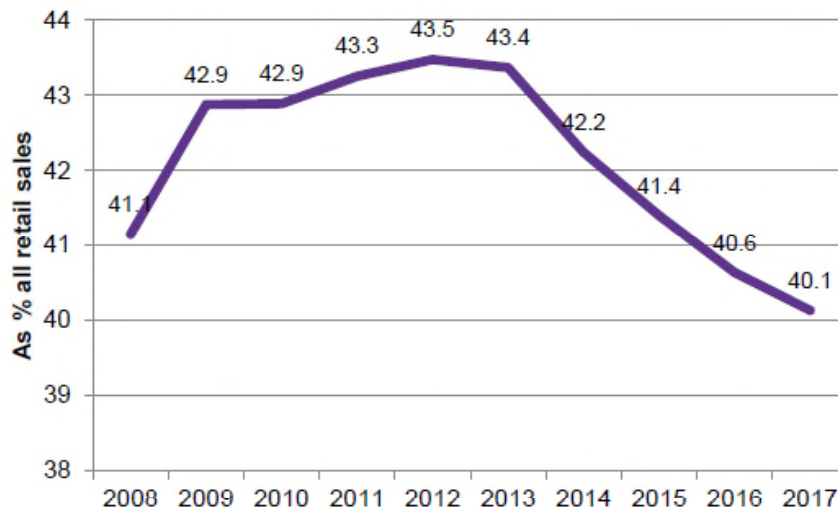
<sup>6</sup> BCSC (2013) Shopping Centre Development Pipeline Report.

<sup>7</sup> Cushman and Wakefield (2016) UK Shopping Centre Development Report

<sup>8</sup> Tesco, Sainsbury’s, Asda and Morrisons

4.3.12 **Figure 4.2** shows that supermarket sales as a proportion of total food sales decreased from 43.5% to 40.1% between 2012 and 2017. The falling share of supermarket sales is driven by changes in consumer behaviour; shoppers are undertaking an increased number of smaller 'top-up shopping' or 'basket shopping' trips instead of a weekly food shop to a large out of centre food store. This trend has been exacerbated by the growth of online grocery shopping, as customers undertake top-up shopping to supplement the main grocery delivery.

Figure 4.2 Supermarkets' sales as % of total food sales 2008-2017



Source: Office for National Statistics/Mintel

4.3.13 Convenience operators' business models have shifted towards the expansion of smaller 'C-format' stores. Both Sainsbury's and Tesco now have more 'C-stores' than large supermarkets. In January 2015, Tesco announced they would abandon the development of 49 'very large' food stores and close 43 unprofitable stores. Both Sainsbury's and Morrison's have also withdrawn from multiple large development schemes.

### Growth of the commercial leisure sector

4.3.14 Most commentators predict that commercial leisure, such as cafes, bars, restaurants and cinemas, will constitute a growing share of town centre floorspace. These key trends include<sup>9</sup>:

- Cinema sector: expected to expand via acquisition and diversification of the market despite falling attendance figures over the last two years. The big three cinema operators (Vue, Odeon and Cineworld) are focusing on larger markets where there is limited competition. The second-tier boutique operators and independent operators are focusing on the qualitative difference in their offer to enable them to create specialist markets.
- Restaurant sector: contributed significantly to the continued growth of the leisure sector throughout and since the recession. Demand for A3 space is being driven by the regional expansion of successful A3 operators established in central London.
- Health and fitness: the market is expected to experience continued growth in market value with annual memberships increased from 12.6% to 13.2% and 177 new facilities opened in the year up to 2014 predominantly in the budget sector.
- Class D2 leisure use (Children's Play): resurgence from the large format D2 leisure operators since the last economic downturn. Operators are offering increasingly diverse

<sup>9</sup> Savills (2015) UK Commercial Market in Minutes, Savills World Research



activities (e.g. laser combat, climbing and trampoline parks) in response to consumer's spending more disposable income on leisure-based activities.

- Hotels (Class C1 use): Brexit and the consequent weakness of the pound has strengthened demand from overseas for hotel accommodation. However, the level of growth is modest and further potential growth is dependent on future economic growth of the UK in relation to domestic hotel visits. Recent growth in hotel accommodation has concentrated on national and international operators such as Travelodge, Premier Inn, Holiday Inn and the Ramada Group of hotels, in many cases as part of wider mixed-use developments with good accessibility to key transport nodes.

4.3.15 When considering leisure expenditure available to households, spending on food and drink typically accounts for more than 50% of total leisure spending, compared to around 15% on 'cultural services' (e.g. going to the cinema, theatre, art galleries or live music) and under 10% on hotels, 'games of chance'<sup>10</sup> and recreation/sporting services.

4.3.16 There is scope for town centres to capitalise on this trend, redefining their function as leisure 'destinations' in their own right. The development of a strong commercial leisure offer can help to increase footfall and increase dwell-time in centres. However, increasing competition from out of town retail parks is now also occurring within the leisure sector.

### Effects of digital technology

4.3.17 The rapid uptake of digital technology in the retail sector has facilitated the growth of online sales which has had a noticeable impact on the built environment in terms of the ways in which retailers utilise physical floorspace.

4.3.18 The increased threat posed by internet retailing has prompted many National retailers to adopt new business strategies. In the non-food sector, the most competitive retailers have rationalised their property portfolios and focused new investment in online retailing (web development, mobile retailing and click and collect including Amazon Lockers and Doodle shops) in order to boost the efficiency of their operations.

4.3.19 Property portfolio rationalisation has resulted in many retailers closing smaller less profitable stores, typically in smaller district centres and concentrating investment in building a smaller network of large stores in larger shopping destinations from major centres upwards together with substantial new developments.

4.3.20 Experience has shown that retailers who have invested in multi-channel retailing have proved most successful in recent years. Multi-channel retailing includes a digital online retail presence complemented by physical stores located in a range of accessible and attractive locations. Some retailers are increasingly utilising digital technology to drive footfall and in-store purchases. Examples of such practices include:

- in-store handheld internet devices: to provide customers with detailed product information and enable online ordering;
- geo-referencing: sending information to customers' mobiles about offers and promotions when they pass close to a store; and
- mobile loyalty card programmes: allow offers to be tailored to individuals shopping habits.

4.3.21 These developments help to ensure that town centres remain a focus for retailing uses despite the significant rise in online sales and other out of centre shopping centres and standalone

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<sup>10</sup> Games of chance covers a wide range of games whose outcome depends upon an element of chance, even though skill of the contestants may also be a factor influencing the outcome. A game that involves anything of monetary value, or upon which contestants may wager money is considered gambling.

stores. Innovative approaches to fulfilment of customer orders and other retail needs is essential to maintaining footfall which otherwise will be lost.

#### 4.4 Economic trends

4.4.1 This section provides an overview of key retail and leisure forecasts taken from the latest Experian Retail Planner Briefing Note published in December 2018 ('ERPBN16') including expenditure growth, multi-channel retailing and floorspace efficiency growth, which inform the estimates of expenditure capacity set out in Section 6.

##### Expenditure growth

4.4.2 The UK referendum result, to leave the EU, has created major economic uncertainty in the short-term which is expected to take a toll on investment and hiring plans while the recent decline in sterling will result in higher inflation. According to Experian, this combination of slower employment growth and higher inflation is expected to reduce retail sales growth to just 1.9% in the immediate short term (2018-2020).

4.4.3 **Table 4.1** shows the forecast growth for convenience, comparison and leisure spending per capita for five distinct periods; pre-recession (1997-2007); the recession and its aftermath (2008-2011); the recovery (2012-2017); short-term forecast (2018-2020); medium term forecast (2021-2025) and long-term forecast (2026-2037). This allows for an easy comparison of historic and long-term trends.

Table 4.1 Summary of long-term retail growth prospects

Growth per capita	Average annual growth (%)						
	Period	1997-2007	2008-2011	2012-2017	2018-2020	2021-2025	2026-2037
Total retail		5.3	0	2.6	1.9	2.2	2.3
Convenience		0	-2.9	0.2	0.5	0.1	0.1
Comparison		8.2	1	4.1	2.7	3.3	3.2
Leisure		-0.6	-3.1	0.4	0.9	1.2	1.2

Source: Figure 1a, ERPBN16 (December 2018)

4.4.4 In the short term, retail spending growth will slow sharply as a result of economic uncertainty related to the Brexit vote according to Experian. Convenience retail spending is forecast to slow from the pre-vote levels of 1.3% in 2017 down to 0.1% in 2020 and comparison retail spending growth is expected to slow from 5.5% in 2017 down to 2.8% in the same period. In contrast, leisure spending growth is expected to increase from 0.3% in 2017 up to 1% in 2020.

4.4.5 Retail sales volumes are expected to recover as Brexit-related uncertainty subsides which is reflected in the higher retail spending growth rates forecast from 2018-2025 as shown in Table 4.1. However, this is not the trend across every sector as convenience growth is forecast to fall and remain at 0.1% in the medium to long term. This level is still comfortably above the exceptionally weak performance between 2007-2014.

4.4.6 In the long-term, forecast growth in retail sales per capita will recover to reach 2.3% although this is well below the historic pre-recession rate of 5.3%. The failure of the convenience sector



to post a sustained recovery in recent years despite the strengthening of household finances has resulted in Experian’s long-term growth forecasts remaining subdued over the long term. Experian’s long-term comparison growth forecast (3.2%) will remain significantly lower than the pre-recession period (8.2%) due to the economic constraints posed by Brexit and the ongoing need for fiscal restraint.

- 4.4.7 Leisure spending is forecast to perform well in the long-term compared to historic trends as shown in Table 4.1. Experian predicts that spending will reach 1.2% in the long-term (2026-2037) which is a reversal of the historic trend of declining per capita leisure expenditure.
- 4.4.8 Medium to longer term trends are difficult to predict and estimates will be revised as updated datasets are published. However considerable uncertainty is still present as Brexit negotiations with the EU are ongoing and will continue throughout 2019.

### Multi-channel retailing

- 4.4.9 Multi-channel retailing is when a company provides multiple ways for customers to purchase goods and services. This includes traditional retailers, internet derived sales (including click and collect purchases), shopping channels and mail order/ catalogues. Special forms of trading (SFT) data is collected by the ONS and includes all non-store retail sales (internet, catalogue, outdoor markets, telephone sales and door to door).
- 4.4.10 SFT has significantly outpaced traditional retail sales in recent years and Experian forecasts that it will continue to do so for several years to come. This growth has been driven by the increasing popularity of internet shopping.
- 4.4.11 As detailed in **Table 4.2** below, SFT now accounts for almost 20% of total retail sales. Internet sales have been rising much more rapidly than general retail sales in recent years. Based on data collected in the first ten months of 2017, internet sales’ share of total retail increased from 4.7% in June 2008 to 17% in 2017.

Table 4.2 Adjusted SFT market shares<sup>11</sup> (%)

	2018	2023	2028	2033	2037
Total Retail	12.1	15	16.5	17.3	17.9
Comparison	17	20.1	21.3	21.6	21.8
Convenience	3.7	4.8	5.3	5.7	5.9

Source: Figure 5, ERPBN16 (December 2018)

- 4.4.12 The rise of internet retailing has changed how retailers use traditional retail outlets. It provides retailers with an opportunity to reach new consumer markets but poses a threat for those retailers who are unresponsive to changing shopping habits. The growth in online sales has had the most negative impact on those sectors which are more exposed to the digitisation of products and services, such as electrical goods, books and music. Thus, the number of retailers selling these products from ‘retail stores has reduced over recent years. This is evidenced by the closure of Woolworths, Blockbuster and HMV.
- 4.4.13 The failure of retailers to adapt and provide complementary online shopping platforms has contributed to the high-profile closure of national retailers such as BHS and House of Fraser. However, retailers which have adopted a successful multi-channel shopping offer are expected to see increasing demand for retail stores driven by online sales growth. Demand for

<sup>11</sup> Adjusted for SFT sales from stores.

retail floorspace in the future will be supported by the increasing desire from customers to view, compare and test products and receive product information in-store before purchase.

### Sales density growth

- 4.4.14 Sales density growth, also referred to as floorspace efficiency growth, refers to the ability of retailers to achieve increases in their turnover year on year that exceed inflation. It is important for retail assessments to take this into account since it allows for a certain amount of expenditure growth to be 'ring-fenced' to be spent within existing businesses. This is also important for retailers to remain viable over time.
- 4.4.15 Conventionally, retail capacity assessments make an allowance for the year on year growth in average sales densities of existing floorspace as a claim on expenditure growth. Since there is limited evidence on annual turnover growth achieved by retailers it has been necessary to make informed assumptions about sales density growth in the convenience and comparison sector based on data provided by industry bodies, Experian and Pitney Bowes.
- 4.4.16 The quality and configuration of floorspace will determine its ability to achieve sales density growth. Modern large format retail units have greater potential to grow its sales density year on year compared with small traditional shop units. In the comparison sector, a range of expenditure growth rates are applied from 2016 onwards depending on the nature of the property offer, as follows:
- High (2.5%): locations with a significant proportion of modern retail property or a high-quality retail offer (i.e. premium retailers)
  - Medium (1.9%): locations with a mix of modern and older retail properties and a mixed retail offer
  - Low (1.5%): locations with a significant proportion of older retail properties or a low-quality retail offer (i.e. discount stores).
- 4.4.17 The above figures are PBA estimates which are consistent with the long-term year-on-year expenditure growth forecast at around 3.0% by Experian.
- 4.4.18 The ability for the convenience sector to improve its turnover year on year is restricted due to the high trading levels that already exist relative to the comparison sector Experian forecast negative growth rates in the convenience sector up to 2024 when growth will resume at just 0.1% from 2024-2035. For these reasons, PBA have not allowed for the existing floorspace to improve its turnover year-on-year.

## 4.5 Key findings

Market trends which are likely to influence the demand for new retail and commercial leisure floorspace across the replacement LDP period include:

- Polarisation to higher-order centres: National comparison retailers are increasingly rationalising their property portfolios with fewer large stores concentrated in high order centres, shopping malls and regional centres.
- Restructuring of the convenience goods sector: Since the economic downturn major retailers have increased their network of small in-centre stores and invested in online shopping while discount food operators such as Aldi and Lidl have increased their market shares.
- Growth of commercial leisure sector: Commercial leisure uses will constitute a growing share of town centre floorspace driven in part by the increase in household leisure expenditure and reduced demand for retail space in secondary centres.
- Effects of digital technology: Digital technologies facilitating online sales have altered the ways in which retailers utilise physical floorspace and it is likely that new technologies will impact on the retail sector in unpredictable ways.

The quantitative forecasts which inform the assessment of need set out in **Sections 6 and 7** include:

- Retail spending growth: Experian forecasts that comparison spending will grow on average by 3.4% per annum between 2018 and 2033. Convenience spending is expected to grow extremely modestly over the study period (0.2% per annum).
- Leisure spending growth: Experian forecasts that leisure spending will grow on average by 1.2% per annum between 2018 and 2033 for leisure.
- Sales density growth: PBA assume a range of efficiency growth rates for existing comparison floorspace from 1.5% to 2.5% per annum but no growth for existing convenience floorspace.
- Growth in e-commerce/m-commerce: Experian forecast that growth in non-store retailing will exceed traditional retailing. The internet's share of total retail sales is forecast to increase from 12.1% to 17.3% between 2018 and 2033. Internet sales growth will be sustained by the increasing uptake of new technologies, such as purchasing through mobile devices.

## 5 Retail spending patterns

### 5.1 Introduction

- 5.1.1 This Retail Study is informed by a household retail survey carried out by NEMS Market Research in February 2019 to identify patterns of comparison and convenience retail spending across the study area. The full results of this telephone survey are provided in Volume 2 of this Study.
- 5.1.2 The study area adopted for the household telephone survey is shown in **Figure 5.1** below and **Appendix A**. The study area comprises of eight study zones. Zones 1 - 4 align with BCBC's administrative boundary and zones 5 - 8 extend into neighbouring local authority areas. The wider study area has been adopted to identify the role of BCBC's centres within the sub-region and establish the core catchment of each centre.

Figure 5.1 Study area



- 5.1.3 The geography of the study zones considered in the household survey is summarised in **Table 5.1**.

Table 5.1 Study area zones

Zone	Local authority	Main centre(s)
1	BCBC	Bridgend
2	BCBC	Porthcawl, Pyle
3	BCBC	Maesteg
4	BCBC	Aberkenfig (Valleys Gateway)
5	Vale of Glamorgan	Cowbridge
6	Rhondda Cynon Taf	Porth, Tonypany, Tonyrefail
7	Neath Port Talbot	Treorchy
8	Neath Port Talbot	Pyle, Port Talbot

5.1.4 NEMS Market Research completed a total of 800 telephone surveys in February 2019; questions were asked on convenience, comparison and leisure spending. The raw survey data is provided in Volume 2.

5.1.5 Weightings are applied to this spending data to provide composite market shares for convenience and comparison spending (see Tables 4 and 6, **Appendix C**) which inform our quantitative assessment of retail needs. The quantitative assessment tables are provided at **Appendix C** and the key data inputs and assumptions are shown in **Appendix D**.

## 5.2 Spending patterns

5.2.1 The spending patterns data for comparison and convenience goods is presented in Tables 5 and 7 in **Appendix C**. This is calculated by distributing the total expenditure in the study area in 2018 (Tables 2 and 3) to destinations in the study area based on the results from the telephone household survey (Tables 4 and 6). The results of the household survey are considered in the remainder of this section.

### Comparison goods

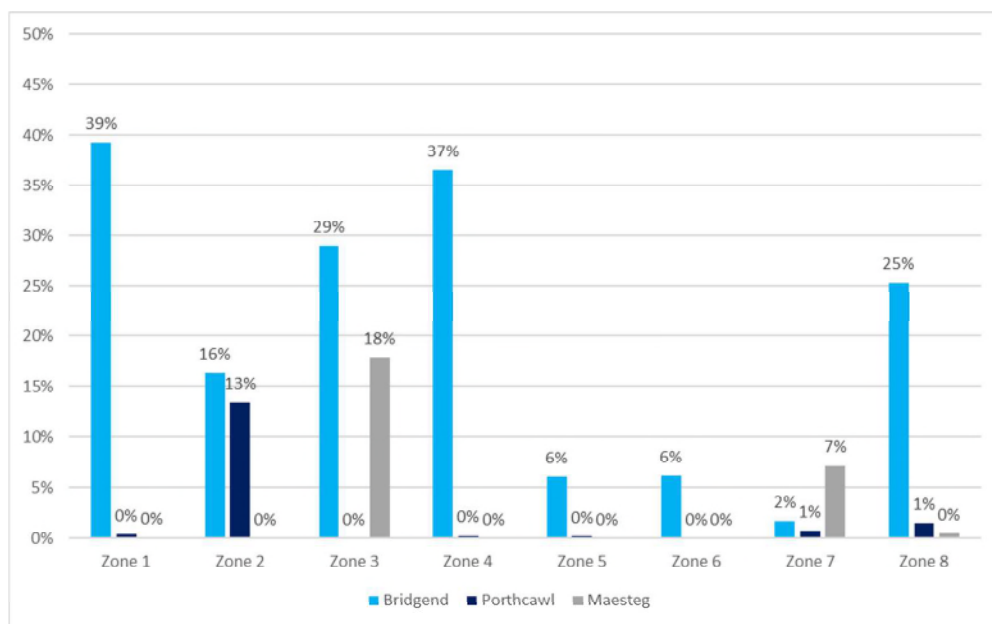
5.2.2 **Table 5.2** below summarises for BCBC how much comparison spending is derived from BCBC (retained expenditure) and from other zones in study area (inflow expenditure) as well as how much expenditure leaks outside of BCBC (expenditure leakage).

Table 5.2 BCBC comparison spending patterns summary 2018

Comparison spending patterns	£m	%
Turnover retained in BCBC zones	329.4	78%
Turnover derived from elsewhere in study area	92.9	22%
Leakage from BCBC zones	171.1	34%

- 5.2.3 The results show that comparison destinations in BCBC predominantly serve the county borough's residents and have a limited influence over shopping patterns outside the borough. The results also suggest that there is scope to increase the market share of BCBC; however, this will depend on the ability of centres to secure new investment.
- 5.2.4 The graph at Appendix E illustrates the zonal market shares of the most popular comparison shopping destinations across the study area including designated centres in BCBC, out-of-centre destinations in BCBC and competing destinations outside the borough. The graph shows that Bridgend town centre is the most popular comparison shopping destination in four out of eight zones (1, 3, 4 and 8). Cardiff has a strong influence over shopping patterns across the study area; it is the most popular destination in three zones (2, 6 and 7). Cardiff also has a strong influence over shopping patterns in BCBC; it is the second-most popular destination in zones 1, 3 and 4 and the most popular destination in zone 2. The most popular shopping destination in zone 5 is Pontypridd. Although located outside the study area, Pontypridd is closely related to zone 5. Swansea also attracts a significant amount of spending from the study area, with a market share of between 7% and 12% in three zones (3, 7 and 8).
- 5.2.5 **Figures 5.2** and 5.3 present the zonal market shares of the borough's main designated centres and out-of-centre destinations. These figures show the level of influence that centres have over comparison shopping patterns across the study area.

Figure 5.2 Comparison market shares for designated centres by zone

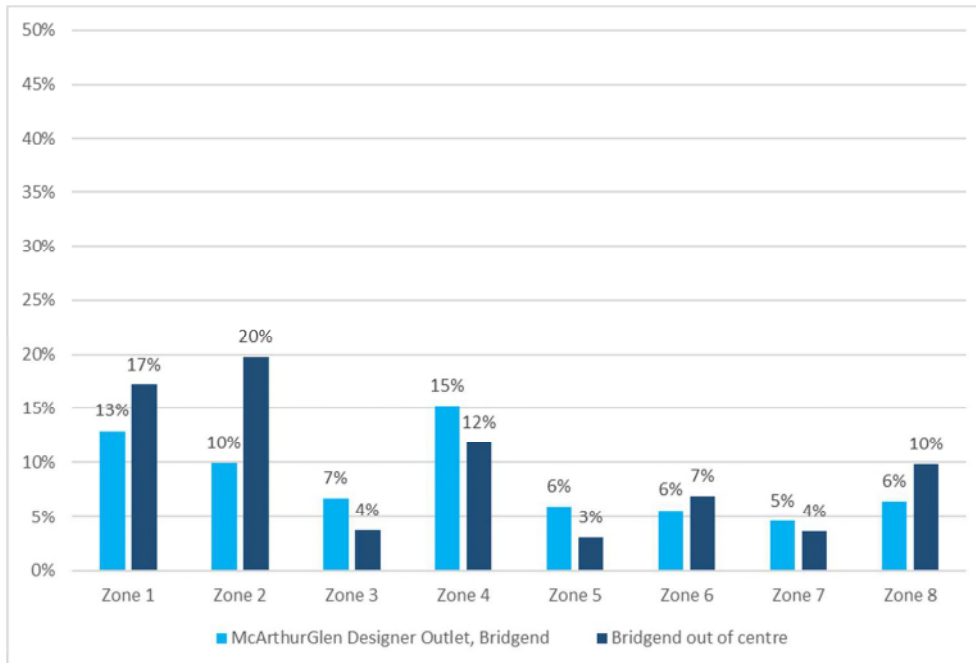


- 5.2.6 The core catchment area of Bridgend town centre extends across zones 1, 2, 3, 4 and 8 where it attracts a market share of 15% or more. Its core catchment extends beyond the borough boundary which shows that the centre has a sub-regional function as a comparison shopping destination. Porthcawl and Maesteg both only attract a significant market share in their own zones which reflects their position below Bridgend in the retail hierarchy.
- 5.2.7 **Figure 5.3** below presents the zonal market shares for the county borough's main out-of-centre destinations. 'Bridgend out-of-centre' combines the market shares for Bridgend Retail Park, Waterton Retail Park and other free-standing out-of-centre stores.
- 5.2.8 The core catchment area for out-of-centre destinations in BCBC covers zones 1, 2, 4 and 8 where the market share is between 20% and 10%. The core catchment area for McArthurGlen Designer Outlet covers zones 1, 2 and 4 where it attracts a market share of 10% or more.



5.2.9 A comparison of **Figures 5.2** and **5.3** indicates that Bridgend town centre attracts a greater market share across zones 1-4 than out-of-centre destinations. This suggests that the combination of shops, complementary services and community facilities in the town centre contribute to the attraction of Bridgend as the primary comparison shopping destination in the borough.

Figure 5.3 Comparison market shares for out of centre destinations by zone



### Convenience goods

5.2.10 **Table 5.3** below summarises for the BCBC zones how much convenience spending is derived from BCBC (retained expenditure) and from other zones in study area (inflow expenditure), as well as how much expenditure leaks to destinations outside BCBC (expenditure leakage).

Table 5.3 BCBC convenience spending patterns summary 2018

Convenience spending patterns	£m	%
Turnover retained in BCBC zones	251.5	82%
Turnover derived from elsewhere in study area	54.5	18%
Leakage from BCBC zones	43.5	15%

Source: Appendix C

5.2.11 As can be seen from this table, a relatively small amount of convenience expenditure generated within BCBC leaks to competing destinations. The level of convenience expenditure leakage is lower than comparison expenditure leakage. This is expected because convenience shopping is undertaken locally whereas shoppers are prepared to travel longer distances to access higher order comparison goods.

5.2.12 **Figure 5.4** below summarises for each zone, the amount of convenience expenditure retained within the zone itself, the amount retained in the study area and the amount leaked to destinations outside the study area. The graph shows that BCBC zones (1 – 4) display very

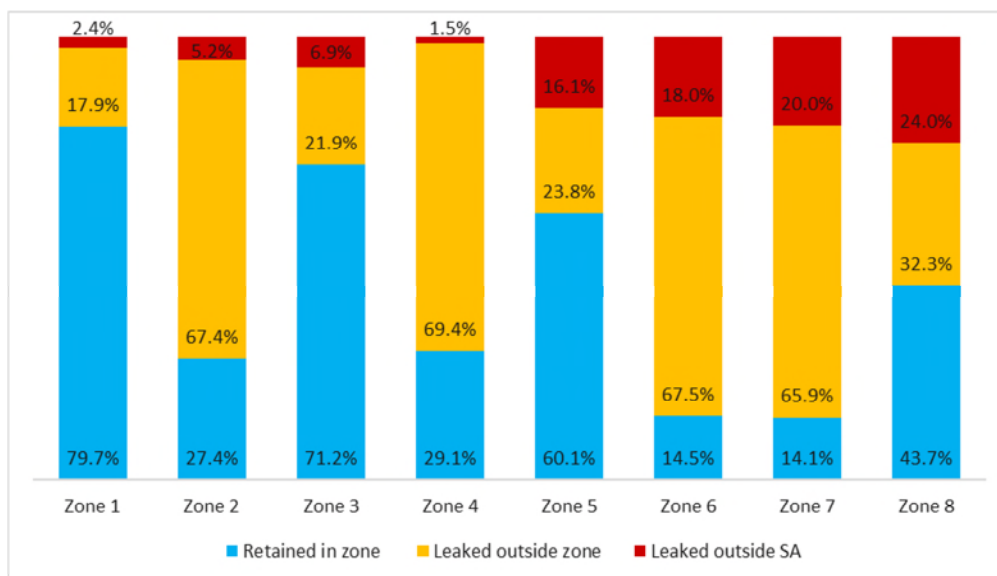


low levels of leakage from the study area. Zones 1 and 3 also show very strong levels of retention within the zone which indicates that most of resident's convenience shopping needs are met locally. The graph suggests that there is scope to improve local convenience shopping facilities in zones 2 and 4; almost three quarters of spending leaks to other zones in the study area and beyond.

5.2.13 Table 4 in **Appendix C** shows that residents in zones 2 and 4 look to food stores in Bridgend (zone 1) to meet a large proportion of their food shopping needs. 41.4% of convenience spending generated in zone 2 and 53.5% of spending generated in zone 3 is directed to Bridgend (zone 1) respectively.

5.2.14 The zones with the highest level of expenditure leakage (zones 6, 7 and 8) from the study area are all peripheral. This suggests the primary reason for expenditure leakage from the study area is the proximity to centres located in adjoining authorities. Overall the spending patterns analysis suggests that most residents living in BCBC are well served by local convenience facilities in the borough although there is scope to improve facilities in zones 2 and 4.

Figure 5.4 Convenience spending patterns by zone



### 5.3 Key findings

A new household survey of shopping patterns was undertaken in February 2019 and forms the basis of the retail needs assessment. The key findings of the spending patterns analysis are as follows:

- BCBC has a strong comparison retention rate: 78% of comparison expenditure is retained in the borough
- The main competing comparison destinations are Cardiff, Pontypridd and Swansea
- Bridgend town centre is the dominant comparison shopping destination in the borough and maintains a sub-regional function as an important comparison shopping destination
- BCBC has a strong convenience retention rate: 82% of convenience expenditure is retained in the borough
- BCBC residents are well served by the existing network of centres across the borough overall which supports the findings of Section 3
- There is scope to improve the local convenience offer in Porthcawl, Pyle and Aberkenfig to reduce expenditure leakage from zones 2 and 4 and promote sustainable access to shops.

## 6 Retail needs

### 6.1 Introduction

- 6.1.1 This section provides an assessment of quantitative and qualitative needs for additional convenience and comparison floorspace in BCBC over the replacement LDP period (2018 – 2033). The assessment also considers the role that leisure uses can play in enhancing the vitality and viability of designated centres in the future. The assessment presented in this Section has been undertaken in accordance with relevant TAN 4 guidance.
- 6.1.2 This section should be read in conjunction with the tables in **Appendix C** which set out all the information referred to below, together with full details of relevant data sources. **Appendix D** details the technical inputs to the quantitative capacity assessment in accordance with TAN 4.
- 6.1.3 PBA advise that capacity forecasts should be subject to regular review throughout the replacement LDP plan period to ensure an up-to-date evidence base which is based on accurate economic trends, as recommended in TAN 23. Longer-term quantitative forecasts in this study (post-2023) should be treated as indicative.

### 6.2 Population

- 6.2.1 The study adopts Experian's base year population in 2017 and Experian's population projections from 2018 to 2033 to forecast baseline retail needs over the replacement LDP period. Experian's population projections align with the subnational population projections (SNPP) and as such provide a robust approach for forecasting baseline retail needs.
- 6.2.2 BCBC has published a Growth Options Study as part of the Replacement LDP evidence base which sets out three growth options (low, medium and high) for the county borough based on different household growth scenarios. The preferred option is the medium growth option which equates to a housing growth target of 505 dwellings per annum, or 7,575 dwellings in total between 2018 and 2033. Should this housing target be achieved then this would give rise to a higher level of population growth and therefore higher levels of retail expenditure capacity than forecast in this study. **Table 6.1** below shows that over the study period, there is forecast to be an additional 4,564 residents in the borough and 7,653 in the whole study area based on Experian's population projections.

Table 6.1 Study area population growth

Year	BCBC zones (1-4)	Zones outside BCBC (5-8)	Total
2018	136,463	125,847	262,310
2023	138,444	127,038	265,482
2028	140,040	128,219	268,259
2033	141,027	128,936	269,963
<b>Growth 2018-2033</b>	4,564	3,089	7,653

Source: Table 1, Appendix C

- 6.2.3 Forecast levels of comparison expenditure growth over the study period are summarised in **Table 6.2** below. This includes a deduction made for SFT (adjusted for sales in stores) which is derived from ERPBN. In keeping with the trends described in Section 4, the proportion of SFT is forecast to steadily increase from 17.0% in 2018 to 21.6% in 2033. Comparison

spending in the study area is forecast to grow by £492.5m between 2018 and 2033 and £261.9m of this will be generated in BCBC.

Table 6.2 Comparison expenditure growth 2018-2033 (exc. SFT) (£M)

Year	BCBC zones (1-4)	Zones outside BCBC (5-8)	Total
2018	500.5	449.0	949.5
2023	556.7	497.2	1,053.8
2028	651.4	581.1	1,232.5
2033	762.4	679.6	1,442.0
<b>Growth 2018-2033</b>	261.9	230.5	492.5

Source: Table 3, Appendix C

- 6.2.4 Forecast levels of convenience expenditure growth over the study period are summarised in **Table 6.3** below which includes a deduction for SFT (adjusted for sales in stores). In the convenience sector, the proportion of SFT is forecast to steadily increase from 3.7% in 2018 up to 5.7% in 2033. Convenience spending in the study area is forecast to grow by £21.3m between 2018 and 2033 and £12.2m of this will be generated in BCBC.

Table 6.3 Convenience expenditure growth 2018-2033 (exc. SFT) (£M)

	BCBC zones (1-4)	Zones outside BCBC (5-8)	Total
2018	295.0	274.6	569.6
2023	301.1	278.9	579.9
2028	304.5	281.5	586.0
2033	307.2	283.7	590.9
<b>Growth 2018-2033</b>	12.2	9.1	21.3

Source: Table 2, Appendix C

- 6.2.5 **Tables 6.2** and **6.3** show that there will a greater level of growth in comparison spending over the study period compared to convenience spending. This is because Experian predict very low annual average growth in the medium to long term (0.1% from 2021-2037) for convenience spending as highlighted in Section 4. For comparison spending, Experian forecast a medium term annual average growth rate of 3.2% (2021-2025) and a long-term growth rate of 3.2% (2026-2037).

### 6.3 Claims on expenditure growth

- 6.3.1 As set out in the previous section, SFT such as online shopping has been removed from the baseline expenditure forecasts, in line with current forecasts of growth in this sector set out in ERPBN. The total expenditure figures summarised in **Tables 6.2** and **6.3** make an allowance for this.
- 6.3.2 In addition to SFT, account needs to be taken of commitments for new retail floorspace (schemes implemented but not yet trading at the time of the household survey, or extant planning permissions which would result in additional retail floorspace) and sales density growth (which is the growth in turnover for existing retailers within the study area).

## Commitments

- 6.3.3 A schedule of commitments is provided in Table 9 in **Appendix C**. Based on supporting evidence provided with those commitments, **Table 6.4** below converts these into draws on expenditure. It is assumed that all the commitments will be trading by 2023 and the assumptions outlined below in relation to sales efficiency growth have been applied.

Table 6.4 Cumulative turnover of commitments by zone (£m)

Zone	Convenience				Comparison			
	2018	2023	2028	2033	2018	2023	2028	2033
1	-	-	-	-	0.0	2.4	2.6	2.9
2	-	-	-	-	0.0	0.6	0.6	0.7
4	0.0	4.5	4.5	4.5	-	-	-	-
Total	0.0	4.5	4.5	4.5	0.0	3.0	3.3	3.6

Source: Table 9, Appendix C

- 6.3.4 There are very few retail floorspace commitments across the county borough including a single convenience commitment and two comparison floorspace commitments. The convenience commitment is the redevelopment of the existing Lidl, Ffordd Antwn, Tondu which will provide an additional 667sqm floorspace (LPA Ref. P/17/610/FUL). The two comparison commitments are for additional retail floorspace at Dunelm, Parc Plaza, Waterton (LPA Ref. P/16/911/FUL) and Pyle Garden Centre (LPA Ref. P/17/816/FUL).

## Sales density growth

- 6.3.5 Sales density growth (or floorspace productivity or efficiency growth) is the amount of expenditure which is 'ring fenced' for existing floorspace to improve its turnover each year. Different types of floorspace will have different abilities to absorb expenditure growth. More modern floorspace being able to accommodate growth than more historic floorspace.
- 6.3.6 In the retail needs assessment, we apply a sales density growth rate of 1.9% from 2018 onwards. This is a PBA estimate which is consistent with the long-term year-on-year expenditure growth forecast at around 3.0% by Experian and the mixed quality of retail stock in the borough. We have not allowed convenience floorspace to improve its turnover year-on-year due to the negligible levels of expenditure growth forecast in the sector by Experian.

## 6.4 Quantitative need

- 6.4.1 Tables 10 and 11 in **Appendix C** present the comparison and convenience needs identified across the study period expressed at the interval years of 2018, 2023, 2028 and 2033. The tables are structured as shown in **Table 6.5** below:

Table 6.5 Step-by-step method

Row	Description
A	Total expenditure available in the study area (£m)

Row	Description
B/C	Proportion of expenditure which is retained (£m & %). Market shares are held constant across the study period.
D	Inflow expenditure derived from the study area zones outside BCBC (£m & %).
E	Total available expenditure (i.e. retained expenditure (row C) + inflow expenditure (row D)).
F	Total available expenditure (i.e. retained expenditure (row C) + inflow expenditure (row E)) plus an allowance for sales efficiencies over the study period.
G	Claims on expenditure as explained above from commitments (explained in Section 6.3)
H	Residual expenditure when deductions are made for claims (row E – row F – row G).
I -K	Residual expenditure converted into floorspace need by applying a generic sales density of £6,000 for comparison goods (grown across the study period to allow for sales efficiency/density growth) and £9,500 for convenience goods (remains constant over the study period). Floorspace need is expressed in terms of net and gross floor areas.

Source: Appendix C and Appendix D

## Comparison goods

6.4.2 **Table 6.6** below summarises quantitative comparison needs over the study period. This shows that there is very little quantitative need for additional comparison floorspace in the borough over the first half of the study period. Significant capacity arises from 2026, however as noted above we recommend exercising caution when considering long-term needs. The figures in **Table 6.6** are based on a constant market share approach which assumes that current trading patterns will remain stable over the study period. This approach has been taken because there are no major comparison commitments in the study area which are expected to significantly alter spending patterns over the study period (Table 9, Appendix C).

Table 6.6 Quantitative comparison needs

	2018	2023	2028	2033
Expenditure capacity (£m)	0.0	2.3	35.9	78.7
Net floorspace capacity (sqm)	-	350	4,960	9,890

Source: Table 10, Appendix C

## Convenience goods

6.4.3 **Table 6.7** below summarises quantitative convenience needs over the study period. This shows that there is also very little capacity for additional convenience floorspace in the borough over the first half of the study period and only moderate capacity from 2026. While there is capacity in the long-term for 810 sq m net additional floorspace, we recommend exercising caution when considering long-term needs. The figures in **Table 6.7** are based on a constant market share approach. Again, this approach has been taken because there are no

major commitments in the study area which are expected to significantly alter spending patterns over the study period (Table 9, Appendix C).

Table 6.7 Quantitative convenience Needs

	2018	2023	2028	2033
Expenditure capacity (£m)	0.0	1.5	5.0	7.7
Net floorspace capacity (sqm)	-	160	520	810

Source: Table 10, Appendix C

## 6.5 Qualitative need

6.5.1 PPW states that LDPs should be based upon a robust assessment of both qualitative and quantitative retail needs. Paragraph 4.3.16 states that the qualitative needs assessment should have regard to the following considerations:

- Local deficiencies in the quantity of retail provision (i.e. gaps in provision)
- Local deficiencies in the quality of retail provision
- Promote sustainable access to shops and reduce the need to travel by car
- Over-trading and or traffic congestion
- Co-location of facilities in existing retail and commercial centres
- Lack of convenience goods provision in disadvantaged areas
- Vibrancy, attractiveness and viability of designated centres

6.5.2 Gaps in retail provision are subjective; what one shopper may consider a gap in provision may not be of concern to another. Judgements about qualitative retail needs are made with reference to the following factors:

- The position of the centre within BCBC's retail hierarchy
- The specific role and function of the centre within that hierarchy
- The need to meet a range of identified shopping requirements
- The need to minimise expenditure leakage and promote sustainable patterns of shopping

6.5.3 These factors need to be balanced against the likelihood of achieving any improvements, including:

- Available comparison and convenience capacity forecast over the study period (Section 6.4)
- Current and emerging retail trends (outlined in Section 4)
- Having regard to identified and likely retailer requirements for centres.

6.5.4 The qualitative comparison and convenience needs for each identified centre in BCBC are reviewed below against the above criteria. The analysis also considers the role of commercial



leisure uses in enhancing the vitality and viability of centres. This assessment is informed by the health check assessments (see **Appendix B**) and the NEMS household survey results (**Section 4** and Volume 2).

### Bridgend sub-regional centre

- 6.5.5 The LDP defines Bridgend as the principal shopping centre in the borough and for some communities outside.
- 6.5.6 The health check of Bridgend concludes that the centre is performing well overall and fulfils its function as a sub-regional centre (**Appendix B**). The centre has a diverse convenience offer with four national multiple supermarket operators alongside a range of independent and specialist food store operators. The health check identifies that the centre has a lower proportion of comparison units than the UK average and a limited fashion offer. However, the household survey results show that Bridgend is the primary comparison shopping destination for residents in the borough and for some communities in neighbouring authorities. The performance of the centre could be improved by enhancing the quality of the environment and increasing the range of commercial leisure facilities.
- 6.5.7 The household survey results indicate that there is local demand for an improved choice of shops and public realm improvements in Bridgend. The most popular suggested improvements for Bridgend include providing a better choice of shops, better quality shops, more national multiple retailers and more independent retailers. Other popular suggestions include improving the appearance of the centre and cleanliness of the streets.
- 6.5.8 The only clear gap in retail provision identified in Bridgend is the fashion offer which is limited for a centre of its size. However, considering the limited available comparison spending capacity in the short term (**Section 6.4**) and competition from out-of-centre comparison shopping destinations (including McArthurGlen Designer Outlet) we recommend focusing on measures to improve the quality of the town centre environment and expanding the commercial leisure offer in the first 10 years of the plan period. Encouraging a greater range of leisure uses in the centre may also help to reduce vacancy rates which exceed UK average levels. In the long term (post-2028), emerging capacity for additional comparison floorspace should be focused in Bridgend town centre.

### Town centres

- 6.5.9 The LDP defines the role of Maesteg and Porthcawl town centres as having a wide range of shops and facilities, including a medium sized convenience offer to meet the needs of their immediate catchment areas.
- 6.5.10 The health check of Maesteg confirms that the centre fulfils its function as a town centre and performs well against most indicators of vitality and viability (**Appendix B**). The convenience offer provides a good level of consumer choice with four national multiple supermarket operators as well as a range of independent operators. The household survey results show that Maesteg meets the convenience needs of most residents in its immediate catchment area. Zone 3 (Maesteg) has a very high zonal convenience retention rate at 71.3%. Maesteg also has a good comparison offer for a centre of its size which predominantly serves its immediate catchment area. The health check identifies opportunities to redevelop prominent vacant units for retail or other uses and expand the range of leisure uses to improve the performance of the centre.
- 6.5.11 The household survey results indicate that there is local demand for an improved choice of shops and improvements to the market in Maesteg. The most popular suggested improvements include providing a better choice of shops, better quality shops and more national multiple retailers. Other suggested improvements include securing improvements to the market and better public facilities.

- 6.5.12 No clear gaps in retail provision have been identified in Maesteg. PBA recommend focusing on measures to improve the quality of the town centre environment, expand the commercial leisure offer and encourage the redevelopment of vacant sites for retail or other complementary uses over the Replacement LDP period.
- 6.5.13 The health check of Porthcawl confirms that the centre fulfils its function as a town centre and performs well against most indicators of vitality and viability (Appendix B). However, the centre has a limited convenience offer which is significantly below the UK average. Although the centre contains a range of smaller food stores suitable for top-up shopping, there is only one large supermarket suitable for main food shopping. The household survey results show that Porthcawl does not meet the convenience needs of most residents in its immediate catchment area. Zone 2 (Porthcawl) has a very low zonal convenience retention rate of just 27.4%.
- 6.5.14 Porthcawl has a good comparison offer which serves its immediate catchment area. Porthcawl is also a tourist destination. As such the centre benefits from a wider range of leisure uses than either Bridgend or Maesteg. The health check identifies an opportunity to develop additional tourist facilities to attract increased levels of visitor spending in the town centre and secure improvements to the public realm. In **Section 3** we have identified committed development schemes for new visitor attractions on Porthcawl waterfront which will help to enhance the vitality and viability of the centre.
- 6.5.15 The household survey results indicate that there is local demand for an improved choice of shops, better public facilities and more leisure facilities in Porthcawl.
- 6.5.16 The only clear gap in retail provision identified in Porthcawl is the main food shopping offer which provides limited consumer choice and means that most residents must travel to other centres to meet their needs. As noted in **Section 6.4**, there is modest capacity for additional convenience floorspace from 2028. Convenience capacity should be focused in Porthcawl town centre to increase consumer choice, promote sustainable access to main food shopping facilities and reduce the need to travel by car. Given the existing qualitative convenience shortfall the delivery of additional floorspace in the first half of the Replacement LDP period would be appropriate.

### District centres

- 6.5.17 The LDP defines the primary role of the district centres as providing essential goods for top-up shops. The LDP states that most centres have a small supermarket and range of services which serve a smaller, more limited catchment area.
- 6.5.18 The health checks enclosed at **Appendix B** conclude that Aberkenfig, Kenfig Hill, Pyle, Pontycymer and Pencoed all fulfil their role as district centre centres. These centres provide a range of small food stores suitable for top up food shopping trips as well as complementary retail services and community facilities. In addition, Aberkenfig, Pencoed, Pyle provide larger food stores suitable to meet resident's main food shopping needs. We have not identified any clear gaps in retail provision in these centres.
- 6.5.19 The health check for Ogmor Vale concludes that the centre is underperforming. Ogmor Vale contains only one small convenience store suitable for top up shopping which provides very limited consumer choice and means that residents must travel to other centres to meet their top up shopping needs. However, given the limited capacity for convenience floorspace in the medium term, we do not recommend allocating additional convenience floorspace in Ogmor Vale. Instead, proposals for new convenience floorspace in designated centres should be determined based on their merits.

## 6.6 Key findings

This section has assessed the quantitative and qualitative needs for additional convenience and comparison floorspace in the BCBC area over the replacement LDP plan period (2018 – 2033). The analysis has also considered the role that leisure uses can play in enhancing the vitality and viability of designated centres in the future. The key findings are as follows:

- In the short to medium term, there is limited capacity for additional comparison floorspace (350 sq m net by 2023)
- In the long term, there is capacity for 9,890 sq m net additional comparison floorspace (up to 2033)
- In the short to medium term there is very limited capacity for additional convenience floorspace (160 sq m net by 2023)
- In the long term, there is capacity for 810 sq m net additional convenience floorspace (up to 2033)
- There is a qualitative need to improve the diversity and quality of the comparison offer in Bridgend to maintain its position as a sub-regional centre. In the long-term (post-2028) capacity for additional comparison floorspace should be focused in Bridgend town centre
- There is a qualitative need to improve the main food shopping offer in Porthcawl. Capacity for additional convenience floorspace should be focused in Porthcawl town centre to address the existing qualitative convenience shortfall.

## 7 Recommendations and conclusions

### 7.1 Introduction

- 7.1.1 This section sets out a suite of linked recommendations on retail need, the distribution of need, the definition of retail boundaries and primary shopping areas in BCBC to inform the LDP Review and the development of policies and site allocations within the emerging replacement LDP.
- 7.1.2 All recommendations are made with reference to PPW, TAN 4 and TAN 23 and are underpinned by the evidence presented in **Sections 2 - 6** and associated appendices. This has included a review of the hierarchy of centres, an assessment of key market trends, a review of the planning policy position, an assessment of shopping patterns and an assessment of quantitative and qualitative retail need.

### 7.2 Key recommendations

#### Distribution of need

- A.1.1 This study has calculated comparison and convenience retail needs based on the constant market shares approach, which assumes that existing shopping patterns will remain stable over the study period (2018 – 2033). This approach is justified as there are no major retail commitments in the study area which are expected to significantly alter spending patterns over the study period.
- 7.2.1 In medium term, there is only limited capacity for additional comparison floorspace (350 sq m net by 2023). The long-term comparison capacity figures (9,890 sq m net by 2033) should be treated as a guide and subject to regular review throughout the plan period. The health checks undertaken have not identified any substantial deficiencies in the comparison shopping offer in any designated centres.
- 7.2.2 In the medium term (up to 2023) BCBC should aim to ensure that comparison retail development is focused in existing designated centres to facilitate the consolidation of existing floorspace rather than allocating additional sites. In the long-term capacity for additional comparison floorspace should be focused in Bridgend as the highest order centre in the county borough.
- 7.2.3 There is no requirement to identify additional site allocations over the replacement LDP period for comparison floorspace. Allocated sites Reg 9(3) (The Embassy Site) and Reg 9(1) (The Brackla Street Centre/Cheapside) provide sufficient capacity to accommodate long-term comparison needs in Bridgend.
- 7.2.4 There is very limited capacity for additional convenience floorspace in the medium term (160 sq m net by 2023) and the long-term convenience capacity figures (810 sq m net by 2033) should also be treated as a guide and subject to regular review throughout the Replacement LDP period. However, we have identified a qualitative need for additional main food shopping facilities in Porthcawl to reduce expenditure leakage and promote more sustainable shopping patterns.
- 7.2.5 Long-term convenience floorspace capacity (post-2028) should be focused in Porthcawl. Given the existing qualitative deficiencies in the main food shopping offer it may be appropriate to bring forward this floorspace before 2028 subject to compliance with the retail sequential and impact tests.
- 7.2.6 The submitted Salt Lake candidate site in Porthcawl contains proposals for commercial development including a new supermarket which would meet forecast long-term convenience

needs. Should the Salt Lake site come forward as a new site allocation there will be no requirement to identify additional site allocations for convenience floorspace over the replacement LDP period however BCBC should continue to treat proposals for new convenience floorspace in designated centres positively.

### Retail centre boundaries

- 7.2.7 PPW states that planning authorities should consider making changes to retail and commercial centre boundaries where the right balance of uses is not being achieved (Paragraph 4.3.35). Paragraph 4.3.37 states that changes to the retail and commercial centre boundaries may be appropriate where the periphery of the centre is in decline and regeneration initiatives are unlikely to be successful.
- 7.2.8 The existing distribution of uses in BCBC's designated centres is shown on the maps at **Appendix F**. As part of the health check exercise, the adopted boundaries for all designated centres were reviewed against the existing distribution of uses.
- 7.2.9 The study has identified that frontages on the periphery of Kenfig Hill, Ogmere Vale and Pontycymer district centre all show signs of decline. However, we do not recommend removing these frontages from the boundary since they still contain a high proportion of units in commercial use at present. Instead, we recommend that BCBC monitors the health of these frontages closely over the plan period and considers changing the boundaries if they experience further decline.
- 7.2.10 This Study recommends that all existing retail centre boundaries are taken forward into the replacement LDP.

### Primary and secondary shopping area boundaries

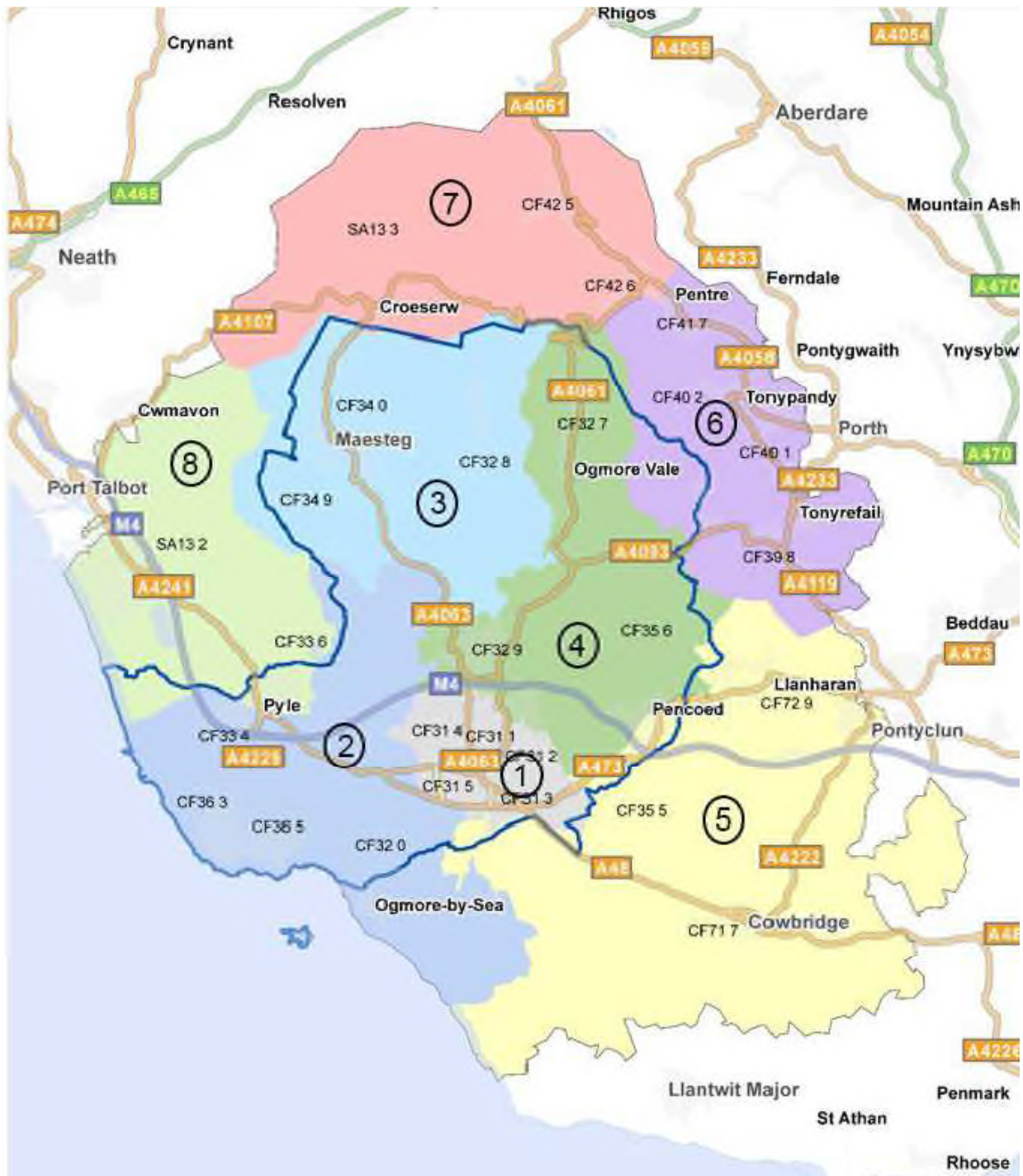
- 7.2.11 PPW requires local authorities to identify which centres have primary and secondary shopping areas and define these on their proposals map (Paragraph 4.3.30). Paragraph 4.3.35 states that planning authorities should consider making changes to the acceptable uses in primary or secondary areas where the right balance of uses is not being achieved. The recommended changes to primary and secondary shopping area boundaries detailed below should be tested and consulted upon through the LDP Review.
- 7.2.12 PBA has reviewed the adopted primary shopping area boundaries for Bridgend, Maesteg and Porthcawl against the existing distribution of uses as shown at **Appendix F**. We recommend that secondary shopping areas should be shown on the proposals map for Bridgend, Maesteg and Porthcawl. Clear policy expectations about the type of uses acceptable in such locations should be set out in the Replacement LDP.
- 7.2.13 The proposed primary and secondary shopping area boundaries are shown for each centre at **Appendix F** based on definitions set out within PPW (paragraphs 4.3.31 - 4.3.32) and local circumstances.
- 7.2.14 In Bridgend, we recommend that the primary shopping area is extended to include the Bridgend Shopping Centre, which has been redeveloped since 2012 in line with Policy REG9(1). We also recommend re-designating the adopted primary shopping area along Nolton Street and Wyndham Street as a secondary shopping area to reflect the current distribution of uses.
- 7.2.15 We recommend condensing the primary shopping area in Maesteg to reflect the current distribution of uses. Specifically, the primary shopping area along Commercial Street should be re-designated as a secondary shopping area. No changes are proposed to the primary shopping area in Porthcawl.

## Monitoring


- 7.2.16 As advised elsewhere in this report, we recommend that retail capacity forecasts should be subject to regular updates throughout the Replacement LDP period to ensure that the retail evidence is based on accurate economic trends as recommended in TAN 23.
- 7.2.17 BCBC should also monitor the performance of designated centres over the plan period to ensure that the centre boundaries reflect the distribution of uses within those centres. We recommend that BCBC monitors the health of Kenfig Hill, Ogmore Vale and Pontycyme closely over the plan period and considers amending the centre boundaries if they experience further decline.



# Appendix A Study area plan



**Key**

-  BCBC administrative boundary



# Appendix B Centre health checks



**Uses by category**

Category	No. of units	% of units	UK national average (units)	Floorspace (sqm)	Floorspace (%)	UK national average (floorspace)
Convenience	18	5	10%	12,354	8	19%
Comparison	84	22	37%	19,563	13	43%
Services	215	57	39%	109,701	70	26%
Vacant	60	16	13%	9,280	6	12%
<b>Total</b>	<b>377</b>	<b>100</b>	<b>100%</b>	<b>150,897</b>	<b>100</b>	<b>100%</b>

<b>Foodstores</b>	Asda, Tesco, Iceland, Wilko, Poundland, Home Bargains, B&M Express, Aldi, Holland and Barrett.
<b>Other retail uses &amp; markets</b>	Various, including: entertainment (computer games), phone shops, off licence, clothes, health and beauty, charity and betting shops.
<b>Other national multiples</b>	Various, including: WH Smith, Game, New Look, Peacocks, Dorothy Perkins, Burton, Claire's, O2, Three Store, EE, Boots and Greggs.
<b>Leisure uses</b>	Pubs, restaurants, cafes, hotel, fitness centres, betting shop, social club, amusement arcade and nightclub.
<b>Other services</b>	Various, including: banks, butchers, hairdressers, pharmacies, estate agents, solicitors, nail salon and job centre.

**Accessibility**

<b>Public transport</b>	Centrally located bus station with regular services to: McArthurGlen Designer Outlet, Bridgend Retail Park, Cardiff, Cowbridge, Port Talbot and Swansea. Bus stops at regular intervals on spine road (Derwen Road/ Nolton Street). Edge of centre train station with destinations including: Swansea, Cardiff, Port Talbot, Pencoed, Maesteg and Pyle.
<b>Car parking</b>	Four car parks within the centre: Brackla One (354 spaces), Brackla Three (115 spaces), Rhiw (242 spaces) and Bridgend Station NCP (95 spaces) proving a total of 806 long-stay spaces. A limited amount of short-stay on-street car parking including disabled spaces is provided near to the main shopping frontages along Nolton Street and Court Road. A further 346 parking spaces are provided in walking distance of the centre.
<b>Pedestrian linkages &amp; disabled access</b>	The centre generally provides a high-quality accessible environment with good pedestrian links from central parking areas to main shopping frontages. The Rhiw shopping centre and nearby bus stops are linked by a large pedestrianised zone. Most units have non-stepped access. Street crossings on Brackla Street/ Nolton street are equipped with facilities for the blind. Wide pavements along Nolton Street. However, Ogmore River and the A473 create a physical barrier between the edge of centre supermarket to the north.

**Environmental quality**

<b>Retail unit size &amp; quality</b>	Predominantly medium and small units with large edge of centre supermarket. Generally small units in Rhiw Shopping Centre and larger units in the newer Bridgend Shopping Centre. Significant presence of vacant units throughout centre. Unit quality is variable with some evidence of under-investment.
<b>Access to green space</b>	Newbridge Fields located approximately 700m south east of the centre and the Ogmore riverside path provide opportunities for outdoor recreation. Otherwise there is a lack of easily accessible green space.

<b>Townscape &amp; street furniture</b>	Good provision of on-street seating, street lighting and sign-posting throughout the centre and some street planting.																						
<b>Perception of safety &amp; evidence of crime</b>	Generally clean well-lit streets overlooked by active ground floor uses. CCTV in operation at shopping centres. Some narrow pedestrian routes leading to car parks may be perceived as less attractive or unsafe at night.																						
<b>Development opportunities &amp; recent investment</b>	Evidence of some recent investment including a new mixed-use building on Nolton Street by Coastal Housing Group. No clear development opportunities identified.																						
<b>Commercial yields</b>	5 yr. average yield – 8.6%																						
<b>Commercial rents</b>	<p style="text-align: center;"><b>Daily Asking Rent Per SF</b></p> <p style="text-align: center;">Source: CoStar 2019</p>																						
<b>Customer views &amp; behaviour</b>	<p>NEMS conducted a household survey between in February 2019 which asked for respondent's views on town centres in BCBC. The survey received 607 responses about improvements to Bridgend town centre. The top ten responses are included below.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Response</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Better choice of shops in general</td> <td>24%</td> </tr> <tr> <td>More national multiple (high street chain)..</td> <td>11%</td> </tr> <tr> <td>Better quality of shops</td> <td>8%</td> </tr> <tr> <td>More independent shops</td> <td>8%</td> </tr> <tr> <td>More parking</td> <td>7%</td> </tr> <tr> <td>Cheaper / free parking</td> <td>6%</td> </tr> <tr> <td>Cleaner streets / removal of litter</td> <td>3%</td> </tr> <tr> <td>Improve appearance / environment of..</td> <td>3%</td> </tr> <tr> <td>More priority for pedestrians</td> <td>3%</td> </tr> <tr> <td>More control on other anti-social behaviour</td> <td>3%</td> </tr> </tbody> </table> <p style="text-align: center;">Survey Respondents</p>	Response	Percentage	Better choice of shops in general	24%	More national multiple (high street chain)..	11%	Better quality of shops	8%	More independent shops	8%	More parking	7%	Cheaper / free parking	6%	Cleaner streets / removal of litter	3%	Improve appearance / environment of..	3%	More priority for pedestrians	3%	More control on other anti-social behaviour	3%
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<b>Retailer requirements</b>	There is one published retailer requirement for Bridgend (as of 14/01/2019); Magnet has a requirement for premises ranging from 1,500 sqft to 12,000 sqft.	
<b>Recommendations</b>		
<b>Summary (SWOT)</b>	<b>Strengths</b> <ul style="list-style-type: none"> <li>▪ Wide range of retail shops and services including a diverse convenience shopping offer.</li> <li>▪ Good pedestrian routes, public transport linkages and provision of street furniture.</li> <li>▪ Comparatively low yield indicates strong demand for space compared to other Bridgend centres.</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>▪ Prominent vacant units detract from the centre's environmental quality.</li> <li>▪ Vacant units detract from the cohesiveness of the centre's retail circuit.</li> <li>▪ Average asking rents fell from £19 per sqft in early 2016 to £14 per sqft in late 2018 which indicates falling operator demand.</li> <li>▪ Limited town centre leisure offer including no mainstream cinema operator.</li> </ul>
	<b>Opportunities</b> <ul style="list-style-type: none"> <li>▪ Consolidate retail uses along primary frontages to improve environmental quality and footfall.</li> <li>▪ Redevelopment of prominent vacant buildings (incl. the former York Café Bar on York Street / Wyndham Street).</li> <li>▪ Potential to expand the range of leisure uses to enhance the evening economy.</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>▪ High level of vacant units may create a negative perception of the centre.</li> <li>▪ Competition for expenditure from larger centres and out of centre retail destinations (McArthur Glen Designer Outlet, Bridgend Retail Park and Cardiff).</li> </ul>
<b>Recommendation</b>	Good health – the centre performs well against most indicators of vitality and viability. However, the comparison fashion shopping offer is limited for a sub-regional centre and there is potential to improve the quality of the public realm and environment.	



**Uses by category**

Category	No. of units	% of units	UK national average (units)	Floorspace (sqm)	Floorspace (%)	UK national average (floorspace)
Convenience	15	9	10%	5,101	19	19%
Comparison	49	29	37%	7,150	25	43%
Services	96	56	39%	12,595	46	26%
Vacant	10	6	13%	2,596	9	12%
<b>Total</b>	<b>170</b>	<b>100</b>	<b>100%</b>	<b>27,442</b>	<b>100</b>	<b>100%</b>

<b>Foodstores</b>	Tesco, Aldi, Iceland, Asda and Filco.
<b>Other retail uses &amp; markets</b>	Various, including: florist, toys, greengrocer, independent clothing, jewellery and bathroom and kitchen showrooms.
<b>Other national multiples</b>	Various including: Peacocks, New Look, Argos, Greggs, Specsavers, Thomas Cook, Dominos, NatWest, TSB, Ladbrokes and Wetherspoons.
<b>Leisure uses</b>	Pubs, tea rooms, restaurants, social clubs, hotel, cafés and yoga centre.
<b>Other services</b>	Retail services include: estate agents, solicitors, photography, post office, repairs and key cuttings and hair and beauty salons.

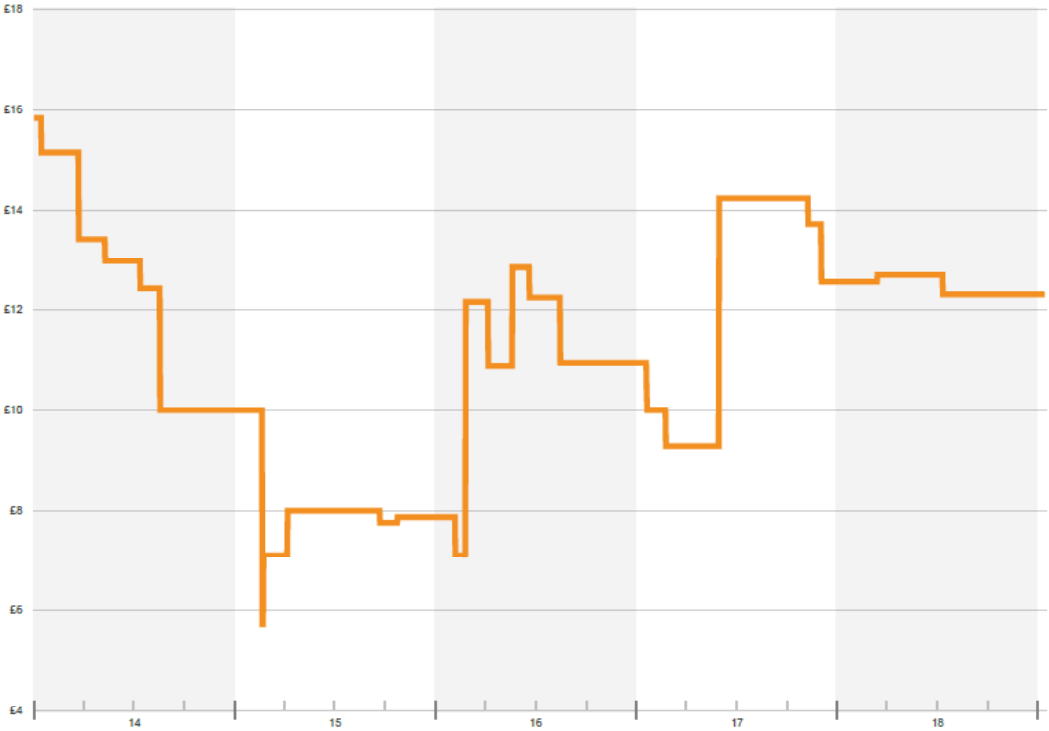
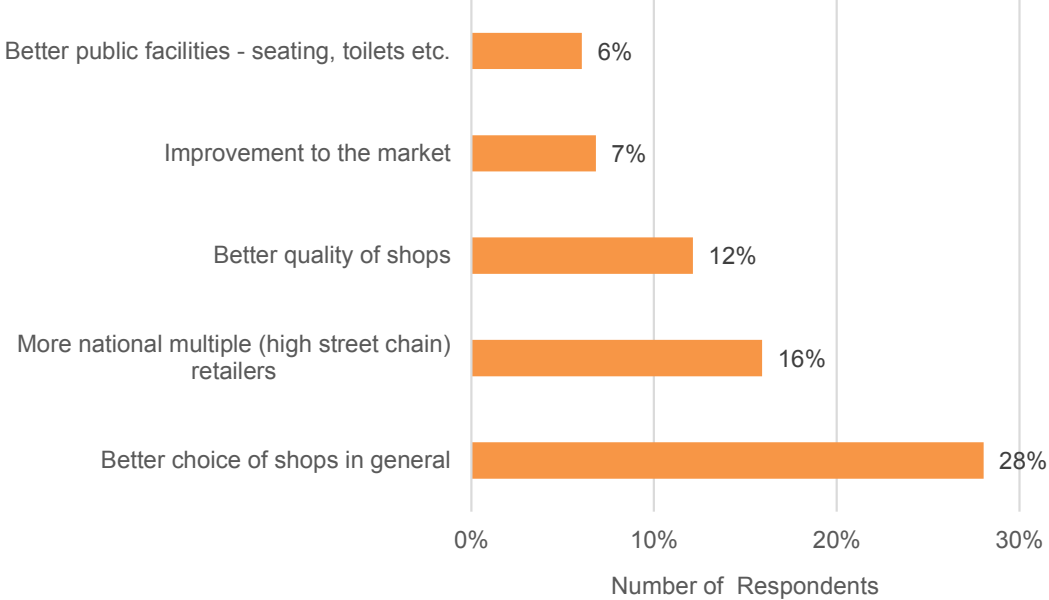
**Accessibility**

<b>Public transport</b>	Central bus station located at the Town Hall with regular services to Bridgend, McArthurGlen Designer Outlet, Swansea, Port Talbot and surrounding settlements. Regular bus stops along Commercial Street. Train station located within walking distance of the centre which provides a direct link to Bridgend train services.
<b>Car parking</b>	Good level of on-street parking which generally does not appear to affect traffic flow. Large multi-storey central car park at Llynfi Road (340 spaces). Out of centre parking provided at Maesteg Hospital (75 spaces) and large customer car parks at Asda, Aldi and Tesco.
<b>Pedestrian linkages &amp; disabled access</b>	Streets generally appear well-kept and clean with wide footways and sufficient pedestrian crossing points including facilities for the blind. Most units have step free or ramped access and the disabled access provided within the pedestrianised market area.

**Environmental quality**

<b>Retail unit size &amp; quality</b>	Most units are small and well-kept. Large scale convenience stores with some comparison offer at edge of centre locations. Some vacant units not well-maintained with broken or boarded windows, and broken, damaged or vandalised headboards. Large scale vacant building at the Talbot Street/Castle Street intersection.
<b>Access to green space</b>	Informal and private green spaces within walking distance of the centre.
<b>Townscape &amp; street furniture</b>	Public shelter featuring artwork and benches on Talbot Street. Frequent benches along Commercial Street. Sufficient provision of street bins. Recurring street tree planting and small-scale landscaped seating area on Commercial Street. Scenic location enhances the town scape.
<b>Perception of safety &amp; evidence of crime</b>	No evidence of anti-social behaviour. Active ground floor uses along the main commercial frontages provide natural surveillance.



<b>Development opportunities &amp; recent investment</b>	Recent investment evident at Town Markets including small new open-air units, evidence of repairs to the Town Hall, new shelter and public art. Large brownfield site off Ewenny Road presents a potential opportunity for new development. Awen Cultural Trust is developing a regeneration strategy for Maesteg Town Hall and Markets.													
<b>Commercial yields</b>	5 yr. average yield – 9.4%													
<b>Commercial rents</b>	<p style="text-align: center;"><b>Daily Asking Rent Per SF</b></p>  <p>Source: CoStar 2019</p>													
<b>Customer views &amp; behaviour</b>	<p>NEMS conducted a household survey in February 2019 which asked for respondent's views on town centres in BCBC. The survey received 132 responses about improvements to Maesteg town centre. The top five responses are included below.</p>  <table border="1" data-bbox="387 1290 1441 1888"> <thead> <tr> <th>Response</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Better choice of shops in general</td> <td>28%</td> </tr> <tr> <td>More national multiple (high street chain) retailers</td> <td>16%</td> </tr> <tr> <td>Better quality of shops</td> <td>12%</td> </tr> <tr> <td>Improvement to the market</td> <td>7%</td> </tr> <tr> <td>Better public facilities - seating, toilets etc.</td> <td>6%</td> </tr> </tbody> </table>		Response	Percentage	Better choice of shops in general	28%	More national multiple (high street chain) retailers	16%	Better quality of shops	12%	Improvement to the market	7%	Better public facilities - seating, toilets etc.	6%
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<b>Retailer requirements</b>	There are two published retailer requirements for Maesteg (as of 14/01/2019); Marston's Plc and Bighthouse have requirements for premises ranging from 1,500 sqft to 9,000 sqft.													
<b>Recommendations</b>														
<b>Summary (SWOT)</b>	<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>Good levels of accessibility via public transport.</li> </ul>	<p><b>Weaknesses</b></p>												

	<ul style="list-style-type: none"> <li>▪ High quality and accessible public realm with street furniture.</li> <li>▪ Good mix of independent operators and national multiples.</li> <li>▪ Strong convenience shopping and retail services offer.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Prominent vacant units which have fallen into disrepair detract from the centre's environmental quality.</li> <li>▪ The evening leisure economy offer is limited to bars and restaurants.</li> <li>▪ Limited comparison shopping offer compared to larger competing centres.</li> </ul>
	<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>▪ Potential for mixed use development at the large-scale brownfield out of centre site on Ewenny Road.</li> <li>▪ Potential to improve the quality and expand the range of leisure uses to enhance the evening economy.</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>▪ New retail units at Ewenny Road could direct footfall and spending away from existing retailers in the centre.</li> <li>▪ Reliance on the sale of the Ewenny Road site to fund Town Hall/Markets regeneration.</li> <li>▪ Competition for expenditure from larger centres and out of centre retail destinations (Bridgend, McArthur Glen Designer Outlet, Bridgend Retail Park and Cardiff).</li> </ul>
<b>Recommendation</b>	<ul style="list-style-type: none"> <li>▪ Good health - the centre fulfils its function as a town centre and performs well against most indicators of vitality and viability. There is an opportunity to further diversify the centre's offer by providing additional leisure uses.</li> </ul>	





**Uses by category**

Category	No. of units	% of units	UK national average (units)	Floorspace (sqm)	Floorspace (%)	UK national average (floorspace)
Convenience	18	9	10%	4,292	13	19%
Comparison	58	28	37%	7,270	22	43%
Services	118	58	39%	18,423	57	26%
Vacant	11	5	13%	2,484	8	12%
<b>Total</b>	<b>205</b>	<b>100</b>	<b>100%</b>	<b>32,470</b>	<b>100</b>	<b>100%</b>

<b>Food stores</b>	Co-operative Food, One Stop, B&M Express, Spar and Poundland.
<b>Other retail uses &amp; markets</b>	Various, including: clothing, off licence, charity shop, e-cigarettes, card shops, household products, shoe shop, health and beauty, florist and opticians.
<b>Other national multiples</b>	Various, including: Greggs, New Look, Peacocks, Superdrug, Costa Coffee, Specsavers, Clarks, Boots, Lloyds Bank, Barclays and Holland & Barrett.
<b>Leisure uses</b>	Pubs, restaurants, cafes, theatre, cinema, betting shop, health club, social club, hotels and guest houses.
<b>Other services</b>	Various, including: banks, barbers, bakery, fast food, wealth management, pharmacy, chemist and job centre.

**Accessibility**

<b>Public transport &amp; PTAL</b>	Centrally located bus stops on John Street with regular bus services to: Aberkenfig, Pyle, Kenfig Hill, McArthurGlen Designer Outlet, Bridgend Retail Park, Bridgend, Cowbridge and Cardiff. Bus stops located throughout the centre at Lias Road, Esplanade Hotel and Griffin Park.
<b>Car parking</b>	Large car parks conveniently located close to the centre from the A4106: Hillsboro (263 spaces), Hillboro South (77 spaces), John street (95 spaces) provide 435 long-stay parking space. Good level of free and on-street parking throughout the centre, including on Mary Street. Further parking available outside of the centre at Rest Bay Car Parks: (1,180 spaces) including summer overflow parking.
<b>Pedestrian linkages &amp; disabled access</b>	Good pedestrian connections to public transport nodes and the seafront. Pedestrian crossing on Lias Road connecting to main shopping street (St John Street) equipped with facilities for the blind. Pedestrian zone linking St John Street to the seafront. The A4106 creates a clear physical barrier between the eastern and western sides of the centre. The underground pedestrian connection between John Street and New Road provides a safe link.

**Environmental quality**

<b>Retail unit size &amp; quality</b>	Generally good quality small traditional shop units along John Street and New Street with larger units towards edge of the centre. Limited number of vacant units.
<b>Access to green space</b>	Some access to informal green space towards south of centre on West Drive. Access to seafront from south of centre along Esplanade. Large landscaped park with seating, children's play park and bowling green adjacent to New Road (Griffin Park).
<b>Townscape &amp; street furniture</b>	Well signposted routes. Good provision of street benches and litter bins along John Street and the seafront.

<b>Perception of safety &amp; evidence of crime</b>	No evidence of crime. Good level of natural surveillance through mix of uses. Narrow underground route linking John Street and New Street could be perceived as unattractive/unsafe at night time.												
<b>Development opportunities &amp; recent investment</b>	Evidence of investment along the seafront including public open spaces and new buildings. Further opportunities for mixed use development along the seafront with the proposed council-led redevelopment of the former Salt Lake car park.												
<b>Commercial yields</b>	5 yr. average yield – 9.0%												
<b>Commercial rents</b>	<p style="text-align: center;"><b>Daily Asking Rent Per SF</b></p> <p>Source: CoStar 2019</p>												
<b>Customer views &amp; behaviour</b>	<p>NEMS conducted a household survey in February 2019 which asked for respondent's views on town centres in BCBC. The survey received 123 responses about improvements to Porthcawl town centre. The top five responses are included below.</p> <table border="1"> <thead> <tr> <th>Improvement</th> <th>Percentage of Respondents</th> </tr> </thead> <tbody> <tr> <td>Better public facilities - seating, toilets etc.</td> <td>18%</td> </tr> <tr> <td>Better choice of shops in general</td> <td>17%</td> </tr> <tr> <td>More parking</td> <td>9%</td> </tr> <tr> <td>Cheaper / free parking</td> <td>8%</td> </tr> <tr> <td>More / better leisure facilities</td> <td>8%</td> </tr> </tbody> </table>	Improvement	Percentage of Respondents	Better public facilities - seating, toilets etc.	18%	Better choice of shops in general	17%	More parking	9%	Cheaper / free parking	8%	More / better leisure facilities	8%
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<b>Retailer requirements</b>	Four retailers are currently seeking space in the centre. The requirements range from 1,500 sq ft to 15,500 sq ft. The retailers include Aldi, Shoe Zone, and Brighthouse.												

<b>Recommendations</b>	
<b>Summary (SWOT)</b>	<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>▪ High quality pedestrianised zone.</li> <li>▪ Accessible green space and seafront provide opportunities for leisure and recreation.</li> <li>▪ Relatively low vacancy rate compared to other Bridgend centres.</li> <li>▪ Good public transport provision.</li> <li>▪ Good variety food and drink outlets.</li> <li>▪ Local visitor economy supports the leisure offer and overall viability of the centre.</li> </ul>
	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>▪ Poor pedestrian accessibility between the eastern and western sides of the centre (New Road and John Street).</li> <li>▪ Comparatively low yield indicates weaker demand for space compared to other Bridgend centres.</li> </ul>
	<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>▪ Improve above ground connectivity between New Road and John Street as part of regeneration funding.</li> <li>▪ Improve facilities for visitors to increase tourist spending.</li> <li>▪ Opportunity to develop a new supermarket on vacant edge of centre sites.</li> </ul>
	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>▪ Competition for retail expenditure from larger centres and out of centre retail destinations (Bridgend, McArthur Glen Designer Outlet, Bridgend Retail Park and Cardiff).</li> <li>▪ Competition for tourism expenditure from other destinations (Port Talbot, The Mumbles and Swansea).</li> <li>▪ Potential changes to EU funding streams arising from the UK leaving the EU.</li> </ul>
<b>Recommendation</b>	Good health - the centre fulfils its function as a town centre and performs a related tourist function. The centre performs well against most indicators of vitality and viability and there are some opportunities for further improvement



### Uses by category

Category	No. of units	% of units	UK national average (% units)	Floorspace (sqm)	Floorspace (%)	UK national average (% floorspace)
Convenience	5	9	10	3,478	32	19
Comparison	14	25	37	1,938	18	43
Services	30	35	39	4,516	36	26
Vacant	7	8	13	694	6	12
<b>Total</b>	<b>86</b>	<b>100</b>	<b>100</b>	<b>12,578</b>	<b>100</b>	<b>100</b>

**Foodstores** Family Shopper, Best One, Lidl, Home Bargains and Farm Foods.

**Other retail uses & markets** DIY, appliances, local crafts, two carpet stores, bikes, charity, kitchen showroom, adult shop, hunting shop, florist and mattress sales.

**Other national multiples** Domino's Pizza.

**Other services** Retail services include: accountants, takeaways, public house, buffet, hair and beauty, gambling, insurance, pharmacy and taxi office. Other community facilities in the vicinity of the centre include: community centre, elderly care and conservative club, police station, library, rugby football club, primary school, cricket club, leisure centre, social and athletics club and places of worship.

### Accessibility

**Public transport** Multiple bus stops on Bridgend Road which provide access to regular bus services to: Bridgend, McArthurGlen Designer Outlet, Maesteg and Porthcawl. Tondy rail station provides regular services to: Port Talbot, Bridgend, Swansea and Cardiff.

**Car parking** Generally good level of car parking across the centre. Centrally located free parking at Heol Y Llyfrau (35 spaces) and further edge of centre parking at Hope Avenue (35 spaces). Large customer car park at Pentre Felin Retail Park and Lidl. Short stay on-street parking along Bridgend Road. Car parking appeared to be near capacity at the time of the site visit.

**Pedestrian linkages & disabled access** Predominantly narrow footways with high kerb lines along Bridgend Road with no formal crossing points provide present potential highways risk. Direct pedestrian footway to large convenience stores towards edge of centre.

### Environmental quality

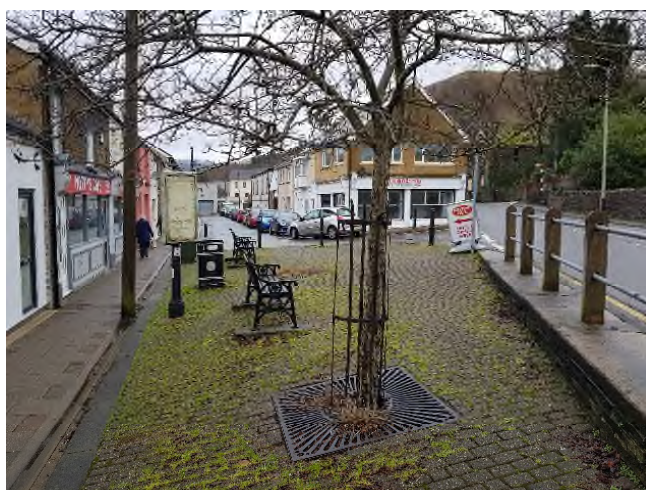
**Retail unit size & quality** Predominantly small traditional shop units along the main shopping frontage (Bridgend Road) with some larger units north of the railway bridge at Pentre Felin Retail Park and Lidl. Shop fronts are generally well kept and clean with evidence of investment in new facades and signage. Relatively few vacant units recorded.

**Access to green space** Large central park within a short walking distance from the centre with access from East Street, New Street and Bristol Street. Established tree line provides screening to the elevated railway route. Landscaped seating area with planting at the corner of Bridgend Road and Pandy Road.

**Townscape & street furniture** North of Rock Street the retail frontage along Bridgend Road appears to be removed from the rest of the frontage due to the high concentration of non-retail uses which break up active frontages. Good provision of bus shelters throughout the centre. Good quality centrally located landscaped seating area with planting at the corner of Bridgend Road and Pandy Road.

<b>Perception of safety &amp; evidence of crime</b>	Centrally located police station increases perception of safety. Pedestrian route beneath the railway could be perceived as unsafe at night time.	
<b>Development opportunities &amp; recent investment</b>	Evidence of investment in landscaped seating area at the centre of Bridgend Road. No obvious opportunities for further investment.	
<b>Commercial yields</b>	5 yr. average yield – 10%	
<b>Commercial rents</b>	n/a	
<b>Customer views &amp; behaviour</b>	n/a	
<b>Retailer requirements</b>	No retailers have published requirements for space within Aberkenfig (as of 20/02/19).	
<b>Recommendations</b>		
<b>Summary (SWOT)</b>	<b>Strengths</b>	<b>Weaknesses</b>
	<ul style="list-style-type: none"> <li>▪ National multiple convenience retailers.</li> <li>▪ Good level of access to public transport (bus and rail services).</li> <li>▪ Close proximity to attractive green space.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Lack of formal crossing points.</li> <li>▪ Lack of clear signage to highlight accessible green space.</li> <li>▪ Parking appeared near capacity on day of visit.</li> </ul>
	<b>Opportunities</b>	<b>Threats</b>
	<ul style="list-style-type: none"> <li>▪ Provision of formal crossing point.</li> <li>▪ Signposting of parks and open space.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competition from larger centres and out of centre destinations for comparison expenditure (particularly McArthurGlen Designer Outlet and Bridgend).</li> <li>▪ Competition from large out of centre food stores for convenience expenditure (particularly Sainsbury's, Bridgend).</li> </ul>
<b>Recommendation</b>	Good health - the centre fulfils its function as a district centre and performs well against most indicators of vitality and viability although there are some opportunities for further improvement.	





### Uses by category

Category	No. of units	% of units	UK national average (units)	Floorspace (sqm)	Floorspace (%)	UK national average (floorspace)
Convenience	1	3	10	109	2	19
Comparison	3	8	37	441	9	43
Services	25	66	39	3,821	76	26
Vacant	9	24	13	676	13	12
<b>Total</b>	<b>80</b>	<b>100</b>	<b>100</b>	<b>5,047</b>	<b>100</b>	<b>100</b>

#### Foodstores

Nisa.

#### Other retail uses & markets

Local crafts, florists, carpets and furniture.

#### Other national multiples

N/A

#### Other services

Retail services include: takeaway food, cafes, restaurant, barbers, hair salons, health and beauty, pharmacy, post office, optician, estate agents, public house, dentist, financial advisors, funeral services and leisure facilities. Other community facilities near the centre include: a social club, gym and sports hall and community centre, library, primary school, fire station and places of worship. Several guest houses and bed and breakfasts near the centre provide visitor accommodation.

### Accessibility

#### Public transport

Bus stops at the southern end of the High Street and on Bridge street provide services to McArthurGlen Designer Outlet and Bridgend Centre.

#### Car parking

Short term on street parking along the High Street and free off-street parking at Station Yard (50 spaces). On street parking appears to contribute to congestion along High Street and Commercial Street.

#### Pedestrian linkages & disabled access

Central zebra crossing on High Street equipped with facilities for the blind. No other formal crossing points or dropped curbs. Adequate pedestrian linkages to surrounding residential areas.

### Environmental quality

#### Retail unit size & quality

Mostly small units with some units showing lack of investment and damage. Concentration of large vacant units at the northern end of the High Street and vacant site opposite the zebra crossing on the High Street detract from the public realm.

#### Access to green space

Good level of access to parks and equipped play spaces (Park Avenue and River Street). Mature trees on the western side of the High Street. A green cycleway is accessible within the centre (via Blandy Terrace and Commercial Street) linking to Wyndham, Nant-y-Moel and Pant-yr-Awel.

#### Townscape & street furniture

Seating area at the northern end of the High Street is equipped with benches and a litter bin. Vacant units detract from visual amenity of High Street and brake up active frontages.

#### Perception of safety & evidence of crime

Lack of formal crossing points throughout the centre reduce highways safety for the elderly. Good level of natural surveillance throughout most of the centre creates a perception of safety.

#### Development opportunities & recent investment

No evident signs of recent investment. Opportunities could be limited due to lack of demand.

<b>Commercial yields</b>	5 yr. average yield – 9.4%	
<b>Commercial rents</b>	n/a	
<b>Customer views &amp; behaviour</b>	n/a	
<b>Retailer requirements</b>	No published retailer requirements for Ogmores Vale as of 20/02/19.	
<b>Recommendations</b>		
<b>Summary (SWOT)</b>	<b>Strengths</b> <ul style="list-style-type: none"> <li>▪ Good public transport linkages to Bridgend.</li> <li>▪ Good access to open space and recreation facilities.</li> <li>▪ Wide range of services for the size of the centre.</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>▪ High level of vacant retail units.</li> <li>▪ Poor quality shop fronts in need of investment.</li> <li>▪ Retail units are fragmented by vacant units and residential uses.</li> <li>▪ Limited convenience offer for a district centre which means that residents are likely to travel to other destinations for convenience shopping.</li> <li>▪ Lack of street crossings on the High Street.</li> </ul>
	<b>Opportunities</b> <ul style="list-style-type: none"> <li>▪ Redevelop the vacant site at the northern end of the High Street to improve the centre's environmental quality.</li> <li>▪ Improve facilities for visitors to increase tourist spending.</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>▪ Poor quality shop fronts could dissuade private investment.</li> <li>▪ Increased vacancies and further fragmentation of retail uses along the High Street.</li> </ul>
<b>Recommendation</b>	Underperforming – the centre does not perform well against some indicators of vitality and viability; the convenience offer is very limited, and the quality of the public realm is poor in some areas.	





### Uses by category

Category	No. of units	% of units	UK national average (% units)	Floorspace (sqm)	Floorspace (%)	UK national average (% floorspace)
Convenience	6	8	10	836	9	19
Comparison	10	14	37	1,227	14	43
Services	49	69	39	5,865	66	26
Vacant	6	8	13	962	11	12
<b>Total</b>	<b>71</b>	<b>100</b>	<b>100</b>	<b>8,889</b>	<b>100</b>	<b>100</b>

<b>Foodstores</b>	Co-op Food, Londis, Tesco Express and Premier Express.
<b>Other retail uses &amp; markets</b>	Butchers, florist, health and beauty, carpets, mobile phones and off licence.
<b>Other national multiples</b>	Costa Coffee and Greggs.
<b>Other services</b>	Retail services include: public house, restaurants, fast food, café, estate agents, opticians, pharmacy, tattoo parlours, hairdressers and barbers. Other community facilities in and close to the centre include: dentist, public toilets, community hall, social club, fire station, swimming pool, comprehensive school, primary school, library, vet, rugby club and a place of worship.

### Accessibility

<b>Public transport</b>	Centrally located bus stop on Penybont Road with regular services to: Bridgend, McArthurGlen Designer Outlet, Talbot Green and Cardiff. Pencoed Park and Ride and Pencoed railway station are both located within walking distance of the centre. Pencoed railway station provides regular services to Cheltenham Spa, Maesteg, Swansea and Cardiff.
<b>Car parking</b>	Large centrally located free car parking at Penprysg Road (45 spaces). Customer parking provided at Tesco Express and Co-op Food stores.
<b>Pedestrian linkages &amp; disabled access</b>	Good level of pedestrian accessibility with multiple crossing points on Coychurch Road. All crossing points equipped with facilities for the blind. Northern pedestrian link to the train station does not provide step free access, however alternative step free access is available to the south.

### Environmental quality

<b>Retail unit size &amp; quality</b>	Mostly small well-kept independent units with some medium modern units occupied by national multiples (Co-op Food, Tesco Express).
<b>Access to green space</b>	Publicly accessible green space with children's play area located south of Felindre Road within a 5-minutes' walk from the centre. Informal green space and seating at the junction of Colychurch Road / Penybont Road enhance the environment and public realm.
<b>Townscape &amp; street furniture</b>	Adequate provision of benches and rubbish bins. Sheltered bus stop and public toilets available. Informal green space and planting throughout the centre enhances the environment and public realm.
<b>Perception of safety &amp; evidence of crime</b>	Active ground floor uses provide natural surveillance which enhances the perception of safety. Prominent CCTV monitoring on Penybont Road. No obvious evidence of anti-social behaviour or crime.

<b>Development opportunities &amp; recent investment</b>	Investment in new residential development and a ground floor commercial unit fronting onto Penybont Road (Sheppard's Pharmacy). It is unclear whether Trinity Church building on Ponybront Road is currently vacant and forms a long-term redevelopment opportunity.	
<b>Commercial yields</b>	5 yr. average – 9.4%	
<b>Commercial rents</b>	No data available (Co Star)	
<b>Customer views &amp; behaviour</b>	The NEMS household survey (January 2019) recorded six responses about possible improvements to Pencoed district centre: <ul style="list-style-type: none"> <li>• More family orientated facilities (1 response);</li> <li>• Improvement to the market (1 response);</li> <li>• Better choice of shops in general (2 responses);</li> <li>• Improved access for wheelchair and pushchair users (1 response); and</li> <li>• More parking (1 response).</li> </ul>	
<b>Retailer requirements</b>	No published retailer requirements for Pencoed as of 20/02/19.	
<b>Recommendations</b>		
<b>Summary (SWOT)</b>	<b>Strengths</b> <ul style="list-style-type: none"> <li>▪ Good range of convenience retailers.</li> <li>▪ Good access to rail and bus routes to larger centres.</li> <li>▪ Street furniture and public facilities.</li> <li>▪ Limited number of vacant units.</li> <li>▪ Good level of customer car parking.</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>▪ No step free access to the railway station from the north.</li> <li>▪ Prominent vacant building on Penybont Road.</li> </ul>
	<b>Opportunities</b> <ul style="list-style-type: none"> <li>▪ Improve step free access within the centre for wheelchair and pushchair users.</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>▪ Competition for comparison spending from larger centres and out of centre retail destinations (Bridgend, McArthur Glen Designer Outlet, and Cardiff).</li> <li>▪ Competition for convenience spending from large out of centre supermarkets south of Bridgend (Lidl and Tesco Extra).</li> </ul>
<b>Recommendation</b>	Good health - the centre fulfils its function as a district centre and performs well against most indicators of vitality and viability. There are opportunities to improve step free access within the centre.	

**Uses by category**

Category	No. of units	% of units	UK national average (% units)	Floorspace (sqm)	Floorspace (%)	UK national average (% floorspace)
Convenience	2	3	10	542	8	19
Comparison	12	18	37	1,989	30	43
Services	26	39	39	3,416	52	26
Vacant	11	17	13	581	9	12
<b>Total</b>	<b>51</b>	<b>100</b>	<b>100</b>	<b>6,529</b>	<b>100</b>	<b>100</b>

<b>Foodstores</b>	Spar and Co-op Food.					
<b>Other retail uses &amp; markets</b>	Textiles, clothing, charity shop and carpets.					
<b>Other National Multiples</b>	n/a					
<b>Other services</b>	Public house, credit union, building society, barbers, accountants, letting agent, beauty salon, dentist surgery, pharmacy, takeaways, post office, constitutional club, leisure facilities and a tattoo parlour. Other community facilities in and close to the centre include: fire station, police station, primary school and a place of worship.					

**Accessibility**

<b>Public transport</b>	Multiple sheltered bus stops with regular services to Bridgend.
<b>Car parking</b>	Free car park at Oxford Street Car Park (30 spaces). Large customer car park at Co-Op Food. Limited amount of on street parking along Oxford Street including disabled bays.
<b>Pedestrian linkages &amp; disabled access</b>	Single formal crossing point on Oxford Street equipped with facilities for the blind. Some pedestrian links to neighbouring residential streets are limited by steep topography of the valley. Green cycleway accessible from the edge of centre Co-op Food store. Some independent shops do not provide stepped access.

**Environmental quality**

<b>Retail unit size &amp; quality</b>	Mostly small units in reasonably good condition and one new large unit occupied by Co-op Food. However high number of vacant units in need of investment. Long term vacant units on the edge of the centre on Bridgend Road. Evidence of change of use from retail to residential.
<b>Access to green space</b>	Accessible public green space and play area within walking distance of the centre on Meadow Street.
<b>Townscape &amp; street furniture</b>	Benches available in scenic setting at the south of the centre, further seating available at bus stops/shelters. Some street planting at Commercial Place. Village's setting visible throughout centre benefitting visual amenity of the centre. Retail units fragmented by vacant units and residential uses.
<b>Perception of safety &amp; evidence of crime</b>	Active ground floor uses provide natural surveillance which enhances the perception of safety. No obvious evidence of anti-social behaviour or crime.
<b>Development opportunities &amp; recent investment</b>	Recent investment in public realm works (including bollards, public art, newer bus shelter/seating) at Commercial Place/Co-op Food and in new shop frontages. Opportunity to redevelop long term vacant units for alternative uses.
<b>Commercial yields</b>	5 yr. average yield – 9.4%
<b>Commercial rents</b>	n/a

<b>Customer views &amp; behaviour</b>	n/a	
<b>Retailer requirements</b>	No published retailer requirements for Pontycymer as of 20/02/19.	
<b>Recommendations</b>		
<b>Summary (SWOT)</b>	<b>Strengths</b> <ul style="list-style-type: none"> <li>▪ Convenience offer anchored by Co-op Food.</li> <li>▪ Pleasant townscape with good provision of street furniture.</li> <li>▪ Access to public open space and recreational facilities.</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>▪ Insufficient street crossings along the main road.</li> <li>▪ High percentage of vacant units.</li> <li>▪ Fragmented shopping frontages.</li> <li>▪ Long term vacant units.</li> </ul>
	<b>Opportunities</b> <ul style="list-style-type: none"> <li>▪ Units available along main high street frontages.</li> <li>▪ Redevelop long term vacant units for alternative uses.</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>▪ Limited choice in the convenience sector. Co-op Food and Spar are the only convenience stores.</li> <li>▪ Further fragmentation of active street frontages.</li> </ul>
<b>Recommendation</b>	Underperforming - the centre fulfils its function as a district centre but does not perform well against some indicators of vitality and viability. There are opportunities to improve the environmental quality of the centre by redeveloping long term vacant units for alternative uses.	





**Uses by category**

Category	No. of units	% of units	UK national average (% units)	Floorspace (sqm)	Floorspace (%)	UK national average (% floorspace)
Convenience	3	9	10	3,773	29	19
Comparison	14	42	37	5,307	41	43
Services	16	48	39	3,773	29	26
Vacant	0	0	13	0	0	12
<b>Total</b>	<b>33</b>	<b>100</b>	<b>100</b>	<b>12,854</b>	<b>100</b>	<b>100</b>

<b>Foodstores</b>	Asda and Lifestyle Express.					
<b>Other retail uses &amp; markets</b>	Various, including; pet foodstore, carpet store, florist, antiques and vape shop.					
<b>Other national multiples</b>	Greggs.					
<b>Other services</b>	Retail services include: gambling, takeaway, newsagents/post office, barber, hair salon, swimming pool, car valeting, cafes and restaurants. Other community facilities in and close to the centre include: leisure centre, library, indoor play area, two places of worship, Royal British Legion and a primary school.					

**Accessibility**

<b>Public transport</b>	Sheltered bus stops on Ffald Road and Pyle Road provide services to Bridgend, Port Talbot, Porthcawl, Aberkenfig and MacArthur Glen Designer Outlet. Pyle train station is within 10 minutes walking distance of the centre and provides direct services to Bridgend, Porthcawl, Port Talbot and Swansea.
<b>Car parking</b>	On street and off-street car parking on Pyle Road. Large customer car park at Asda supermarket.
<b>Pedestrian linkages &amp; disabled access</b>	Poor pedestrian route to Asda from Ffald Road with no crossing points. Inconsistent provision of facilities for the blind at crossing points. Ramped access between Pyle Road and bus stops. Wide footways on Pyle Road. Most shops on Pyle Road do not have step free access.

**Environmental quality**

<b>Retail unit size &amp; quality</b>	Mostly small well-maintained shop units on Pyle Road occupied by independent operators. Large Asda supermarket contains some smaller sub-let units. The retail terrace on Marlas Road is rundown and in need of investment.
<b>Access to green space</b>	Landscaped green space with seating opposite centre at the junction of Pyle Road and Ffald Road. Green space and an equipped area of play less than ten minutes' walk away from the centre. Informal green space and private recreational facilities adjacent to the centre at Pyle Life Centre.
<b>Townscape &amp; street furniture</b>	Landscaped green space with seating opposite centre at the junction of Pyle Road and Ffald Road. Well-maintained bus shelters along on Ffald Road and Pyle Road.
<b>Perception of safety &amp; evidence of crime</b>	Active ground floor uses along Pyle Road provide natural surveillance which enhances the perception of. Good visibility of surrounding roads. No evidence of crime.

<b>Development opportunities &amp; recent investment</b>	Potential opportunity to refurbish or redevelop the retail terrace on Marlas Road. No other clear opportunities for investment. Potential for improved access to Asda from Ffald Road.	
<b>Commercial yields</b>	5 yr. average yield – 8.4%	
<b>Commercial rents</b>	n/a	
<b>Customer views &amp; behaviour</b>	n/a	
<b>Retailer requirements</b>	Marston Plc is actively seeking units in Pyle between 5,000 sq ft and 9,000 sq ft.	
<b>Recommendations</b>		
<b>Summary (SWOT)</b>	<b>Strengths</b> <ul style="list-style-type: none"> <li>▪ Good level of off-street car parking provision.</li> <li>▪ Good access to public transport.</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>▪ Smaller range of services and community facilities than other district centres.</li> <li>▪ Retail frontages are physically separated from by main roads and traffic.</li> <li>▪ No access to Asda for wheelchair or pushchair users from Ffald Road.</li> </ul>
	<b>Opportunities</b> <ul style="list-style-type: none"> <li>▪ Improve pedestrian links to Asda from Ffald road.</li> <li>▪ Increase the number of convenience stores to improve the diversity of the convenience offer.</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>▪ Limited choice in the convenience sector. Asda and Lifestyle Express are the only convenience stores.</li> </ul>
<b>Recommendation</b>	Good health - the centre fulfils its function as a district centre and performs well against most indicators of vitality and viability. There is an opportunity to improve the environmental quality of the centre by refurbishing / redeveloping rundown retail units.	



**Uses by category**

Category	No. of units	% of units	UK national average (% units)	Floorspace (sqm)	Floorspace (%)	UK national average (% floorspace)
Convenience	2	4	10	318	7	19
Comparison	9	20	37	893	20	43
Services	29	64	39	3,024	66	26
Vacant	5	11	13	324	7	12
<b>Total</b>	<b>45</b>	<b>100</b>	<b>100</b>	<b>4,600</b>	<b>100</b>	<b>100</b>

<b>Foodstores</b>	Spar and Bargain Booze.
<b>Other retail uses &amp; markets</b>	Various, including: florist, butchers, charity, carpets, dresses, sports, equestrian, home heating, and hardware.
<b>Other national multiples</b>	The Post Office.
<b>Other services</b>	Retail services include: restaurants, cafes, takeaways, banks, barbers, beauty salons, tuition centre, optometrist, chiropodist, laundrette, estate agents, taxi service, general practitioner, pharmacies, pet grooming, community centre, building society. Other community facilities in the vicinity of the centre include: two primary schools, a labour club, public house, rugby club, football club and places of worship.

**Accessibility**

<b>Public transport</b>	Regular bus stops along Commercial Street with services to Porthcawl, McArthur Glen Designer Outlet, Bridgend and Port Talbot.
<b>Car parking</b>	Free off-street car parking at Pishgah Street (55 spaces). Limited on street short term parking available along the Bridge Street, Commercial Street and Prince Road.
<b>Pedestrian linkages &amp; disabled access</b>	No footway linking Bridge Street to Pishgah Car Park. Some shops do not provide step free access. Single formal crossing on Commercial Street equipped with facilities for the blind.

**Environmental quality**

<b>Retail unit size &amp; quality</b>	Most retail units are small. Some indication of local investment with new signage and frontages along Commercial Street. Limited number of vacant units. Wide range of retail and community services available within centre.
<b>Access to green space</b>	Publicly accessible green space with equipped play area located to the rear of units along Commercial Road. Informal green space and landscaped area at the south of the district centre opposite Heathbridge House Surgery.
<b>Townscape &amp; street furniture</b>	Private gardens along Commercial Street add greenery to the street scene. Other street planting and seating is focused in landscaped area to the south of the District Centre. Evidence of recent investment in new seating and planting along Pishgah Street opposite Heathbridge House Surgery just to the north of the centre boundary.
<b>Perception of safety &amp; evidence of crime</b>	Good level of street lighting throughout the centre. Active ground floor uses along Commercial Street and Prince Road provide natural surveillance which enhances the perception of safety.
<b>Development opportunities &amp; recent investment</b>	Evidence of recent investment in new seating and planting along Pishgah Street opposite Heathbridge House Surgery just to the north of the centre boundary. Evidence of investment in new shop frontages along Commercial Street.
<b>Commercial yields</b>	5 yr. average yield – 9.4%
<b>Commercial rents</b>	n/a



<b>Customer views &amp; behaviour</b>	n/a	
<b>Retailer requirements</b>	No published retailer requirements for Kenfig Hill as of 20/02/19.	
<b>Recommendations</b>		
<b>Summary (SWOT)</b>	<b>Strengths</b> <ul style="list-style-type: none"> <li>▪ Clean and generally well-presented units.</li> <li>▪ Good range of community facilities and retail services.</li> <li>▪ Well-served by public transport.</li> <li>▪ Low vacancy rate.</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>▪ Retail units at the eastern and western end of Commercial Street are fragmented residential uses.</li> <li>▪ Poor pedestrian access to Pisgah Car Park.</li> </ul>
	<b>Opportunities</b> <ul style="list-style-type: none"> <li>▪ Additional pedestrian crossing points along Commercial Street to provide improved pedestrian access to Pisgah Car Park and open space.</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>▪ Further fragmentation of commercial frontages by loss of retail frontages.</li> <li>▪ Competition from large supermarkets (particularly Asda, Pyle) for convenience spending.</li> </ul>
<b>Recommendation</b>	Good health - the centre fulfils its function as a district centre and performs well against most indicators of vitality and viability. There are opportunities to improve pedestrian accessibility throughout the centre.	



### Uses by category

Category	No. of units	% of units
Convenience	2	33
Comparison	1	17
Services	3	50
Vacant	0	0
<b>Total</b>	<b>6</b>	

**Foodstores** Lifestyle Express and Premier Express

**Other retail uses & markets** DIY & Home Improvement store

**Other services** Retail services include 2 takeaway units and a hair & beauty salon

### Accessibility

**Public transport & PTAL** Bus stops are provided nearby on Heol Glannant and Heol Richard Price.

**Car parking** Free off-street car parking facilities are available immediately in front of the row of units on Y Wern, with 1 marked disabled bay.

**Pedestrian linkages & disabled access** Units provide step-free access from the pavement. Dropped kerbs are provided at either end of the parking provision and on most approaches.

### Environmental quality

**Retail unit size & quality** Small units ranging in size from 40m<sup>2</sup> to 200m<sup>2</sup>. The units are in good condition with uniform, inviting shop fronts and a number of litter bins.

**Access to green space** There is a well maintained playground directly opposite.

**Townscape & street furniture** Street lighting and litter bins are incorporated within the footpath in front of the units. Nearby streets are characterised by green verges and there is a play facility opposite the units.

**Perception of safety & evidence of crime** Street lamps and a CCTV stanchion overlook the frontage of the units which enhance the perception of safety. The area to the rear of the shops is more enclosed but overlooked by residential properties.

**Development opportunities & recent investment** There are few signs of recent investment in the immediate vicinity but the centre is relatively modern and in very good condition.

### Recommendations

#### Summary (SWOT)

#### Strengths

- Clean and well-presented units
- Low vacancy rate

#### Opportunities

- Pedestrian crossing points on Y Wern to improve access from playground

#### Weaknesses

- Lack of seating adjacent to units
- Potential vehicular conflict when parking / exiting

#### Threats

- Duplication of available services in Bettws South
- Competition from other centres with greater range of uses

#### Recommendation

Good health – provides for the everyday local service needs of the local community



### Uses by category

Category	No. of units	% of units
Convenience	1	17
Comparison	0	0
Services	4	66
Vacant	1	17
<b>Total</b>	<b>6</b>	

**Foodstores** Nisa incorporating a Post Office

**Other retail uses & markets** N/A

**Other services** Takeaway units, GP surgery and a community centre. There are additional facilities within close proximity to the centre including a garage and a recently constructed youth centre. There is also a new school adjacent to the centre that has been rebuilt on the site of the previous primary school.

### Accessibility

**Public transport & PTAL** There are sheltered bus stops and facilities on the main Bettws Road which connects the centre to Bridgend.

**Car parking** There are ample free car parking facilities provided adjacent to each of the units that make up the centre.

**Pedestrian linkages & disabled access** The recent construction of a new school has seen new traffic calming measures introduced to aid pedestrian movement and slow vehicular traffic immediately to the north of the centre. Approaches to the shops are relatively flat with dropped kerbs.

### Environmental quality

**Retail unit size & quality** Mostly small units with a generally run down appearance. Several of the units show signs of having been converted from alternative uses. The centre has a fragmented appearance interspersed by residential units and grass verges.

**Access to green space** The areas surrounding the centre are characterised by quite extensive grassed areas, owing to the design of the residential estate.

**Townscape & street furniture** There is little in the way of street furniture other than the occasional litter bin.

**Perception of safety & evidence of crime** The physical separation of the various units prevents the creation of an active frontage. As such the visual impression of some of the buildings is dominated by anti-crime measures (i.e. metal grilles, roller shutters etc.)

**Development opportunities & recent investment** The frontage of the convenience store has recently been improved but there is little evidence of recent investment in the centre. New community facilities have been provided to the north (Bunkhouse and school). There have been various regeneration proposals for the area which have yet to come to fruition.

### Recommendations

Summary (SWOT)	Strengths	Weaknesses
	<ul style="list-style-type: none"> <li>▪ Recent improvements to traffic calming</li> <li>▪ Easily accessible</li> </ul>	<ul style="list-style-type: none"> <li>▪ Units do not work in conjunction with one another</li> <li>▪ Dispersed appearance</li> </ul>

	<b>Opportunities</b> <ul style="list-style-type: none"> <li>▪ Centre would benefit from an aesthetic upgrade</li> <li>▪ Potential to redevelop vacant unit</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>▪ Further fragmentation of centre</li> <li>▪ Limited choice of convenience services</li> </ul>
<b>Recommendation</b>	Underperforming – the units reduce the need to travel and the uses complement each other, but the centre gives the impression of being fragmented and needs an aesthetic upgrade.	



### Uses by category

Category	No. of units	% of units
Convenience	1	20
Comparison	0	0
Services	4	80
Vacant	0	0
<b>Total</b>	<b>5</b>	
<b>Foodstores</b>	A Londis store that incorporates a post office	
<b>Other retail uses &amp; markets</b>	N/A	
<b>Other services</b>	A petrol station which includes a small convenience store, 2 pubs and a café. There is a church within close proximity	

### Accessibility

<b>Public transport &amp; PTAL</b>	There are sheltered bus stops immediately adjacent to the centre on either side of the A4061 connecting the Ogmere Valley to Junction 36 of the M4 and Bridgend to the south.
<b>Car parking</b>	There are a limited number of spaces in front of the units, but ample free car parking to the rear of the garage and the pubs.
<b>Pedestrian linkages &amp; disabled access</b>	The units are at a lower level to the main road, but a ramped access is provided to the rear of the bus shelter (of limited dimension). The immediate environment adjacent to the centre is dominated by the busy A4061, which has limited pedestrian crossing facilities. The centre itself is physically separated from the road and operates as a pleasant cluster focussed around the War Memorial.

### Environmental quality

<b>Retail unit size &amp; quality</b>	The units are relatively small, ranging from 115 to 310sqm but have a pleasant appearance and are tightly clustered to provide an active frontage that will appeal to passers-by. The range of uses is limited and dominated by the garage and 2 pubs.
<b>Access to green space</b>	The centre connects to various walking and cycling routes, providing an attractive stopping off point. There is also a playground within easy walking distance.
<b>Townscape &amp; street furniture</b>	There are various litter bins and seating provided in close proximity to the bus stops. The war memorial makes a pleasant centre piece and gives the cluster of units situated around it the feel of an old established village centre.
<b>Perception of safety &amp; evidence of crime</b>	There is a good level of natural surveillance throughout the centre which creates a perception of safety and little obvious evidence of crime or vandalism. The proximity of the A4061 limits the ease of access for local residents.
<b>Development opportunities &amp; recent investment</b>	There is not much evidence of recent investment. Environmental improvements may lessen the feeling of vehicular dominance.

### Recommendations

<b>Summary (SWOT)</b>	<b>Strengths</b> <ul style="list-style-type: none"> <li>▪ Attractive cluster of uses</li> <li>▪ Good cycle links</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>▪ Narrow pedestrian link at front of convenience store</li> <li>▪ Lack of seating</li> </ul>
	<b>Opportunities</b> <ul style="list-style-type: none"> <li>▪ Environmental improvements to soften vehicular dominance</li> <li>▪ Strengthen links to cycle routes and footpaths</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>▪ Proximity to A4061</li> <li>▪ Limited range of uses</li> </ul>
<b>Recommendation</b>	Good health – functions well as an attractive small local centre fulfilling some of the everyday needs of the local community.	



### Uses by category

Category	No. of units	% of units
Convenience	1	9
Comparison	0	0
Services	6	55
Vacant	4	36
<b>Total</b>	<b>11</b>	
<b>Foodstores</b>	Strand News	
<b>Other retail uses &amp; markets</b>	N/A	
<b>Other services</b>	Other services include a post office, pub, health & beauty salon, a community building and a takeaway unit. There are several vacant units.	

### Accessibility

<b>Public transport &amp; PTAL</b>	Bus stops are readily accessible within the centre, though services are limited and there are a lack of shelters.
<b>Car parking</b>	On street parking is available throughout the centre, though this contributes to the narrow confines of the streets making up the central cluster.
<b>Pedestrian linkages &amp; disabled access</b>	The centre is characterised by narrow terraced streets that emphasise the nature of the topography of the wider settlement. As such some of the pavements are limited in width and there are steep climbs at various locations.

### Environmental quality

<b>Retail unit size &amp; quality</b>	The units are small in nature and are located within the terraced streets interspersed by residential units.
<b>Access to green space</b>	There is a pleasant triangular 'village green' at the junction of The Strand and Herbert Street which acts as a natural focus point and provides a pleasant break in the high density terraced streets that surround it.
<b>Townscape &amp; street furniture</b>	There is plenty of seating provided within the triangle adjacent to The Strand and litter bins are also evident. The lack of an active street frontage detracts from this otherwise appealing central feature of the centre.
<b>Perception of safety &amp; evidence of crime</b>	No immediate perception of crime. The units form an active part of the street frontage providing a good level of natural surveillance.
<b>Development opportunities &amp; recent investment</b>	There are a number of vacant units throughout the centre. No recent sign of investment and opportunities for development are likely to be limited by lack of demand and location.

### Recommendations

<b>Summary (SWOT)</b>	<b>Strengths</b>	<b>Weaknesses</b>
	<ul style="list-style-type: none"> <li>▪ Pleasant environment surrounding The Strand</li> <li>▪ Access to open space</li> </ul>	<ul style="list-style-type: none"> <li>▪ Concentration of vacant units</li> <li>▪ Fragmented nature of centre</li> </ul>
	<b>Opportunities</b>	<b>Threats</b>
	<ul style="list-style-type: none"> <li>▪ Improve facilities to take advantage of growth in tourism sector</li> </ul>	<ul style="list-style-type: none"> <li>▪ Vacant units has increased fragmentation</li> <li>▪ Lack of sense of place could dissuade future investment</li> </ul>
<b>Recommendation</b>	Poor Health – concentration of vacant units with little opportunity for further investment	





### Uses by category

Category	No. of units	% of units
Convenience	4	17
Comparison	4	17
Services	15	62
Vacant	1	4
<b>Total</b>	<b>24</b>	

<b>Foodstores</b>	Co-op
<b>Other retail uses &amp; markets</b>	Pharmacy, charity shops, electrical & other durable goods, bakers, newsagents and off licence
<b>Other services</b>	Takeaways, betting Shop, nursery, estate agents, gym, pub, health & beauty salon, community centre, church, surgery and dentist.

### Accessibility

<b>Public transport &amp; PTAL</b>	Bus stops are located on most approach roads.
<b>Car parking</b>	Ample free spaces provided in purpose built centrally located car park. Units are arranged around this in a courtyard style development. Disabled bays are provided immediately adjacent to units. Further spaces are provided to the rear, though the desire to park immediately adjacent to shops could lead to conflict.
<b>Pedestrian linkages &amp; disabled access</b>	High level of pedestrian accessibility with shared cyclepaths, dropped kerbs and various crossing points. Units are of modern design providing step free access.

### Environmental quality

<b>Retail unit size &amp; quality</b>	Wide variety of units, all in good condition and providing active shop frontages. There is good connectivity to the wider community facilities.
<b>Access to green space</b>	The wider housing estate is characterised by grassed areas and vegetation but there is no formal play area in the immediate vicinity
<b>Townscape &amp; street furniture</b>	The central courtyard has a good amount of street lighting and litter bins. There are benches, though there may be scope for more. Cycle parking is also provided at various locations within the centre.
<b>Perception of safety &amp; evidence of crime</b>	Active ground floor use provides a natural surveillance which enhances the perception of safety. No obvious evidence of anti-social behaviour or crime. There is also prominent CCTV monitoring.
<b>Development opportunities &amp; recent investment</b>	A new school has been constructed nearby which has led to highway improvements. Given relatively young age of the centre, opportunities for further investment are likely to bring environmental improvements.

### Recommendations

<b>Summary (SWOT)</b>	<b>Strengths</b>	<b>Weaknesses</b>
	<ul style="list-style-type: none"> <li>▪ Central location within high density residential area</li> <li>▪ Co-location with various community facilities</li> </ul>	<ul style="list-style-type: none"> <li>▪ Potential for vehicular conflict within car parking provision</li> </ul>
	<b>Opportunities</b>	<b>Threats</b>
	<ul style="list-style-type: none"> <li>▪ Improve public realm</li> <li>▪ Increase amount of seating</li> </ul>	<ul style="list-style-type: none"> <li>▪ Out of centre competition for convenience/comparison spend</li> </ul>

**Recommendation**

Good health – the centre fulfils its function as a local centre with wide range of units, co-located with other community facilities and is easily accessible.



### Uses by category

Category	No. of units	% of units
Convenience	1	7
Comparison	1	7
Services	13	86
Vacant	0	0
<b>Total</b>	<b>15</b>	
<b>Foodstores</b>	Tesco Express	
<b>Other retail uses &amp; markets</b>	Pharmacy	
<b>Other services</b>	Various takeaway units, restaurants/cafes, bars, betting shop, tanning salon and a nursery. The centre is adjacent to a primary school.	

### Accessibility

<b>Public transport &amp; PTAL</b>	Bus stops are located within short walking distance of the centre, which is located within relatively close proximity to the town centre.
<b>Car parking</b>	Free car parking is provided adjacent to the centre, with additional provision on the approach roads. There is evidence of high patronage during school drop-off and pick-up times potentially leading to congestion/conflict. Disabled bays are incorporated.
<b>Pedestrian linkages &amp; disabled access</b>	The centre is located on the crown of a ridge, but level access is provided with ramps where appropriate. The centre is easily accessible by foot.

### Environmental quality

<b>Retail unit size &amp; quality</b>	A range of modern well-kept units. The variety of uses is dominated by takeaways and food & drink outlets with limited convenience choice.
<b>Access to green space</b>	An informal green space separates the centre from the B4622 with formal play areas within a short walking distance.
<b>Townscape &amp; street furniture</b>	The wide footpaths serving the centre are well lit with plentiful supply of litter bins. Due to the nature of the uses present at the centre, several businesses provide outside seating.
<b>Perception of safety &amp; evidence of crime</b>	There is a high degree of natural surveillance from all approaches, with little evidence of crime. The roads serving the centre have been heavily traffic calmed to increase safety.
<b>Development opportunities &amp; recent investment</b>	A relatively young centre, there is little scope or need for further development other than improvements to the aesthetic quality which is currently car dominated.

### Recommendations

<b>Summary (SWOT)</b>	<b>Strengths</b>	<b>Weaknesses</b>
	<ul style="list-style-type: none"> <li>▪ No vacant units</li> <li>▪ High usage</li> </ul>	<ul style="list-style-type: none"> <li>▪ Car dominant</li> <li>▪ Narrow range of uses</li> </ul>
	<b>Opportunities</b>	<b>Threats</b>
	<ul style="list-style-type: none"> <li>▪ Environmental improvements to increase amount of seating</li> </ul>	<ul style="list-style-type: none"> <li>▪ Potential conflict with school traffic</li> <li>▪ Competing uses in town centre</li> </ul>

<b>Recommendation</b>	Good health – functions well as its purpose built intention. The range of uses means there is little opportunity to spend much time here for retail purposes.
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**Uses by category**

Category	No. of units	% of units
Convenience	1	17
Comparison	1	17
Services	4	66
Vacant	0	0
<b>Total</b>	<b>6</b>	

**Foodstores**

Spar

**Other retail uses & markets**

Pharmacy

**Other services**

A GP surgery, community centre and takeaway

**Accessibility****Public transport & PTAL**

A sheltered bus stop is provided adjacent to the community centre.

**Car parking**

Parking is provided free of charge in front of the units, with more formal provision in front of the community centre on the opposite side of the road. The 'drive-up' nature of the spaces could lead to conflict.

**Pedestrian linkages & disabled access**

The centre is located on a slight gradient, but level access is provided in front of the units. There is a lack of formal pedestrian crossing facilities.

**Environmental quality****Retail unit size & quality**

The centre is dominated by a large convenience store which shows evidence of having expanded over time and now incorporates a post office. The other units are smaller.

**Access to green space**

There are various formal and informal recreation spaces located within close proximity of the centre.

**Townscape & street furniture**

Litter bins are provided close to the units along with benches and a community notice board. There is also ample street lighting.

**Perception of safety & evidence of crime**

The linear nature of the centre provides sufficient natural surveillance and there is little evidence of crime. This is enhanced by the presence of residential units above the shops.

**Development opportunities & recent investment**

The centre could benefit from an aesthetic upgrading of the unit frontages and residential units above. A new residential development of approximately 200 houses on the former YBC School site could increase patronage.

**Recommendations****Summary (SWOT)****Strengths**

- Provides a range of community uses
- Drive up parking

**Weaknesses**

- Potential vehicular conflict
- Lack of crossing facilities

**Opportunities**

- Improvements to frontages
- Residential development nearby

**Threats**

- One dominant retail unit
- Potential relocation of GP surgery

**Recommendation**

Good health – fulfils its function as a local service centre. Would benefit from upgraded frontages but provides a range of community facilities easily accessible by foot.



### Uses by category

Category	No. of units	% of units
Convenience	2	11
Comparison	1	5
Services	12	67
Vacant	3	17
<b>Total</b>	<b>18</b>	

**Foodstores** Cost Cutter and a Premier store

**Other retail uses & markets** Pharmacy

**Other services** A credit union, garage, takeaways, taxi hire, a betting office, a hair salon, a pub and a club. Other services nearby include a new primary school, places of worship and a GP surgery.

### Accessibility

**Public transport & PTAL** Sheltered bus stops are provided on the A4063 Duffryn Road.

**Car parking** Parking provision is on-street on the roads leading away from the A4063. There are also spaces provided off-street in front of the Station Hotel which has recently been improved.

**Pedestrian linkages & disabled access** The main cluster of units is provided on Caerau Road which is a narrow terraced street. Dropped kerbs and crossing facilities on connecting roads.

### Environmental quality

**Retail unit size & quality** The units are small in size and in need of visual improvement, but still provide a positive impression of a traditional local centre. There a number of vacant units that detract from the appeal of the centre.

**Access to green space** The centre is interspersed by small areas of greenery with prominent tree planting.

**Townscape & street furniture** The main cluster of units are located in a residential terraced street providing little opportunity for street furniture. The traditional focus of the centre surrounding the war memorial provides a pleasant environment but this area is now characterised by residential units.

**Perception of safety & evidence of crime** No immediate evidence of anti-social behaviour. The centre is broken up by residential units which provide natural surveillance.

**Development opportunities & recent investment** The recent construction of the new primary school has resulted in planning consent for residential units on the old site, close to the centre. The units within the centre need investment.

### Recommendations

#### Summary (SWOT)

#### Strengths

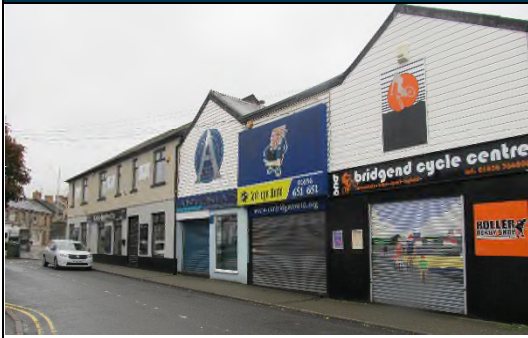
- Good range of uses
- Convenience provision for local community

#### Weaknesses

- Cluster of units in tight terraced street
- Few units located near the war memorial

	<b>Opportunities</b> <ul style="list-style-type: none"> <li>▪ Tourism proposals nearby</li> <li>▪ Residential development of old school site</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>▪ Competition for convenience spend elsewhere</li> <li>▪ Further fragmentation of centre</li> </ul>
<b>Recommendation</b>	Underperforming – Increased number of vacant units, but centre still provides a local function.	





**Uses by category**

Category	No. of units	% of units
Convenience	1	8
Comparison	3	25
Services	7	59
Vacant	1	8
<b>Total</b>	<b>12</b>	

**Foodstores**

Spar

**Other retail uses & markets**

Office supplies, textile & soft furnishings and a cycle & repair shop

**Other services**

Pubs/bar, coffee shop, financial & business services, rugby club and health & beauty salons.

**Accessibility**

**Public transport & PTAL**

The centre is located adjacent to the junction of the A473 / Ewenny Road, both of which have bus stops. The centre is within walking distance of the town centre.

**Car parking**

There is limited parking provision to the rear of the pub and parking restrictions apply to the surrounding streets.

**Pedestrian linkages & disabled access**

Level access is provided to most units and there is a layby in front of the Spar store. There are dropped kerb and crossing facilities at the main junctions.

**Environmental quality**

**Retail unit size & quality**

The cluster of small to medium size units provide a range of uses to serve the local community and remove some of the need to travel into the town centre. The units are in generally good condition.

**Access to green space**

The centre is in a high density residential area and located adjacent to the A473. As such there is no immediately accessible green space. The trees planted next to the Five Bells pub provide visual appeal.

**Townscape & street furniture**

Litter bins are provided adjacent to the units, with pedestrian routes well lit. There is little scope for additional street furniture.

**Perception of safety & evidence of crime**

The range of units and location next to a main road means there is a high level of natural surveillance and little sign of crime.

**Development opportunities & recent investment**

Recent proposals have been made to convert an empty unit into residential accommodation.

**Recommendations**

**Summary (SWOT)**

**Strengths**

- Physically divorced from town centre by A473
- Range of units

**Weaknesses**

- Limited car parking
- Traffic dominant street scene

**Opportunities**

- Environmental improvements to grass verge

**Threats**

- Increased pressure to convert units into residential dwellings
- Limited convenience choice

**Recommendation**

Good health – units are visually appealing in the main and physical separation from the town centre gives it a function as a local centre



### Uses by category

Category	No. of units	% of units
Convenience	1	12
Comparison	1	12
Services	5	63
Vacant	1	12
<b>Total</b>	<b>8</b>	
<b>Foodstores</b>	Simply Local incorporating a post office	
<b>Other retail uses &amp; markets</b>	Carpet Shop	
<b>Other services</b>	A dry cleaners, health and beauty salons, community hall and a church. There is also a pub and restaurants within walking distance of the centre.	
<b>Accessibility</b>		
<b>Public transport &amp; PTAL</b>	The centre is located on the A473, and there are bus stops with shelters connecting Laleston to Bridgend.	
<b>Car parking</b>	There is some free off-street parking provided adjacent to a small cluster of 3 of the units. Additional on-street parking is available though this is restricted by the narrow layout of some of the residential streets.	
<b>Pedestrian linkages &amp; disabled access</b>	The centre is quite dispersed with units and services located on both sides of the busy A473. Pedestrian connectivity suffers as a result, with the main crossing point located away from the main collection of units. The cluster of 3 units is located off the main road, and served by a wide footpath.	
<b>Environmental quality</b>		
<b>Retail unit size &amp; quality</b>	Though limited in number, the range of small units complement each other and provide services for the local community. The units appear to be in good condition and are visually appealing.	
<b>Access to green space</b>	Due to the linear nature of the centre on the A473, there is no immediate access to green space. However, there is a rural character to the village with several areas of mature trees and pleasant foliage.	
<b>Townscape &amp; street furniture</b>	There is limited provision of street furniture, with bins and some seating located adjacent to bus stops.	
<b>Perception of safety &amp; evidence of crime</b>	The centre is fragmented by residential units which provides a level of natural surveillance and there is little evidence of crime.	
<b>Development opportunities &amp; recent investment</b>	One of the pubs has recently been converted into residential use, along with its associated car park.	
<b>Recommendations</b>		
<b>Summary (SWOT)</b>	<b>Strengths</b> <ul style="list-style-type: none"> <li>▪ Attractive centre with local village feel</li> <li>▪ Good range of uses</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>▪ Dispersal of units</li> <li>▪ Pressure for further fragmentation</li> </ul>

	<b>Opportunities</b> <ul style="list-style-type: none"> <li>▪ The good reputation of food/drink uses</li> <li>▪ Improve pedestrian connectivity</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>▪ Competition from out-of-centre units.</li> <li>▪ Limited choice of convenience uses</li> </ul>
<b>Recommendation</b>	<p>Good health – though the centre is somewhat fragmented in nature, the units appear to be in good condition and well used by the local community.</p>	

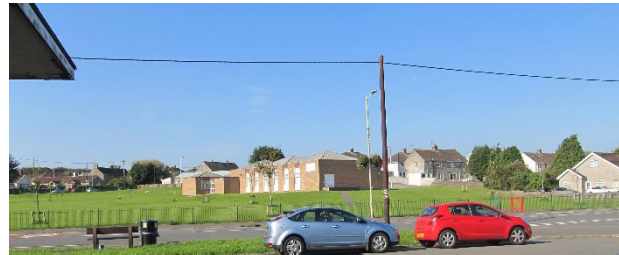


### Uses by category

Category	No. of units	% of units
Convenience	2	14
Comparison	3	22
Services	9	64
Vacant	0	0
<b>Total</b>	<b>14</b>	
<b>Foodstores</b>	Corner Convenience Store	
<b>Other retail uses &amp; markets</b>	A pharmacy, jewellers, charity shop and fruit & flowers shop.	
<b>Other services</b>	A GP surgery, pub, takeaway, hair salons, community hall, petrol station and a photo processing unit.	
<b>Accessibility</b>		
<b>Public transport &amp; PTAL</b>	There are sheltered bus stops on the A4061.	
<b>Car parking</b>	There are no formal off street car parking facilities. On-street parking is available on any of the streets leading off the main A4061.	
<b>Pedestrian linkages &amp; disabled access</b>	The centre is linear in nature, due to the traditional street pattern of Nantymoel and the topography of the area. Despite this the footpaths are relatively flat, though the terraced streets are relatively narrow and there are few passing places.	
<b>Environmental quality</b>		
<b>Retail unit size &amp; quality</b>	The main cluster of uses features small units and can be found on Ogyw Street. These provide an element of a continuous frontage and has a traditional welcoming appearance. The units are more dispersed further north towards the clock roundabout. Encouragingly there are few vacant units.	
<b>Access to green space</b>	Nantymoel is surrounded by green space and the centre itself is easily accessible to formal and informal provision.	
<b>Townscape &amp; street furniture</b>	The narrow terraced streets do not afford many opportunities for street furniture but litter bins are provided.	
<b>Perception of safety &amp; evidence of crime</b>	There are elements of graffiti within the centre, though these add an interesting visual dynamic. The lack of vacant units helps to remove any perception of anti-social behaviour.	
<b>Development opportunities &amp; recent investment</b>	There are no signs of recent investment. The Community Centre has recently been demolished and the site cleared.	
<b>Recommendations</b>		
<b>Summary (SWOT)</b>	<b>Strengths</b>	<b>Weaknesses</b>
	<ul style="list-style-type: none"> <li>▪ Lack of vacant units</li> <li>▪ Cluster of units on Ogyw Street</li> </ul>	<ul style="list-style-type: none"> <li>▪ Limited choice of convenience provision</li> <li>▪ Narrow streetscape</li> </ul>
	<b>Opportunities</b>	<b>Threats</b>
	<ul style="list-style-type: none"> <li>▪ Visual improvements to units</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competition from larger more accessible centres elsewhere</li> </ul>

	<ul style="list-style-type: none"> <li>▪ Benefits from tourism proposals in wider area</li> </ul>	<ul style="list-style-type: none"> <li>▪ Little scope for additional development</li> </ul>
<b>Recommendation</b>	<p>Good health – centre could benefit from investment to aesthetic appearance, but the lack of vacant units and the clustering of uses demonstrates that it fulfils its role to the local community.</p>	





**Uses by category**

Category	No. of units	% of units
Convenience	2	20
Comparison	2	20
Services	6	60
Vacant	0	
<b>Total</b>	10	

<b>Foodstores</b>	Filco, One Stop
<b>Other retail uses &amp; markets</b>	A Pharmacy and a hardware store
<b>Other services</b>	A café, takeaways, community hall & centre and a GP surgery. There is also a school opposite the entrance to some of the units which enhances its patronage.

**Accessibility**

<b>Public transport &amp; PTAL</b>	There are bus stops in the immediate vicinity of the centre
<b>Car parking</b>	Ample free off street car parking is provided at various points within the centre, immediately adjacent to the various units.
<b>Pedestrian linkages &amp; disabled access</b>	The centre is relatively dispersed but there are good pedestrian linkages between the component parts, with zebra crossings and dropped kerbs providing flat access to the various units and community facilities.

**Environmental quality**

<b>Retail unit size &amp; quality</b>	The units work well in conjunction with one another and provide a range of uses and size of shops. The One Stop shop is a relatively new building and all units appear to be in good condition.
<b>Access to green space</b>	Despite being relatively separate from the retail units, the community centre and surgery are connected physically and sensorily to the centre by an attractive open space area that provides a playground and a pleasing element of greenery.
<b>Townscape &amp; street furniture</b>	The centre has a clean appearance with litter bins and seating adjacent to the recreation land which enhances its use.
<b>Perception of safety &amp; evidence of crime</b>	The centre is well lit and the parking provision to the front of the units provide ample visual surveillance.
<b>Development opportunities &amp; recent investment</b>	One of the convenience units is a relatively new facility. There have also been a number of housing developments nearby.

**Recommendations**

<b>Summary (SWOT)</b>	<b>Strengths</b>	<b>Weaknesses</b>
	<ul style="list-style-type: none"> <li>▪ Recreation area connects the centre</li> <li>▪ Range of units</li> </ul>	<ul style="list-style-type: none"> <li>▪ Dispersal of units</li> <li>▪ Access appears to be car dependent</li> </ul>
	<b>Opportunities</b>	<b>Threats</b>
	<ul style="list-style-type: none"> <li>▪ Strengthen connectivity to train station</li> <li>▪ Number of local housing proposals</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competition from out of centre locations accessible from M4</li> <li>▪ Risk of further fragmentation.</li> <li>▪ Upkeep of recreation area</li> </ul>

**Recommendation**

Good health – though dispersed, the centre appears to be well used and offers a complimentary range of retail and community uses



### Uses by category

Category	No. of units	% of units
Convenience	1	33
Comparison	0	0
Services	2	67
Vacant	0	0
<b>Total</b>	<b>3</b>	
<b>Foodstores</b>	Premier Store incorporating a post office.	
<b>Other retail uses &amp; markets</b>	N/A	
<b>Other services</b>	A takeaway. A village hall is also located within the centre.	

### Accessibility

<b>Public transport &amp; PTAL</b>	The centre is located on the A4063 providing connections to Maesteg and Bridgend. Bus shelters are provided on either side of the road adjacent to the small cluster of units.
<b>Car parking</b>	Free parking is provided in front of the units in the form of a pull-up layby. There is off-street parking associated with the village hall.
<b>Pedestrian linkages &amp; disabled access</b>	The units are served by a wide pavement, though each have a small step up to access. There are uncontrolled crossing facilities next to the bus stops.

### Environmental quality

<b>Retail unit size &amp; quality</b>	Though small in size and quantity, the uses within the units complement each other providing for the needs of the immediate community and reducing some of the need to travel elsewhere.
<b>Access to green space</b>	The units are located on a busy main road with no immediate access to green space.
<b>Townscape &amp; street furniture</b>	Bins are provided as part of the street scene, and the units are compact giving the appearance of a centre.
<b>Perception of safety &amp; evidence of crime</b>	There is evidence of CCTV monitoring as part of a road safety scheme and little evidence of crime.
<b>Development opportunities &amp; recent investment</b>	The recent change of use of a church into a village hall complements the centre and could provide further patronage of the units.

### Recommendations

<b>Summary (SWOT)</b>	<b>Strengths</b> <ul style="list-style-type: none"> <li>▪ Compact row of units provides feel of a centre</li> <li>▪ Parking immediately available</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>▪ Busy road to perform parking manoeuvres onto.</li> <li>▪ Limited range and number of units</li> </ul>
	<b>Opportunities</b> <ul style="list-style-type: none"> <li>▪ Village Hall development complements units</li> <li>▪</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>▪ Competition from other centres offering wider range of uses</li> </ul>

		<ul style="list-style-type: none"><li>▪ Loss of any of the units reduces role of centre significantly</li></ul>
<b>Recommendation</b>	Good health – limited size but functions well as a centre for local community	



### Uses by category

Category	No. of units	% of units
Convenience	1	17
Comparison	0	0
Services	5	83
Vacant	0	
<b>Total</b>	<b>6</b>	
<b>Foodstores</b>	General Store	
<b>Other retail uses &amp; markets</b>	N/A	
<b>Other services</b>	2 x health & beauty salons, a takeaway unit, a pub and a community hall	
<b>Accessibility</b>		
<b>Public transport &amp; PTAL</b>	There are bus stops on both sides of West Park Drive, which is adjacent to the centre and within short walking distance. Covered shelters are provided.	
<b>Car parking</b>	Adequate car parking is provided to the rear of the retail units, which is shared with the residential units above and the adjacent Community Hall. The parking is informally laid out and does not provide a sense of arrival at the retail units which are not visible as you approach. The pub, which is physically separated by an area of green recreation space, has its own ample parking provision.	
<b>Pedestrian linkages &amp; disabled access</b>	The centre is located within a densely populated area and is easily accessible by foot. The parade of retail units is on ground floor level and is sheltered by an overhang of the residential units above. Ramped access and dropped kerbs are provided on approaches.	
<b>Environmental quality</b>		
<b>Retail unit size &amp; quality</b>	The units are small to medium in size, and have a frontage facing onto the recreation space but away from passing roads and nearby housing. The range of uses is limited, and the built fabric itself would benefit from an aesthetic upgrade, but the lack of vacant units is testament to the health of the centre.	
<b>Access to green space</b>	A recreation space is located centrally, providing a focal point between the retail units and the pub and acting as a connection between the various uses. Whilst an attractive feature, the space would benefit from environmental upgrades. It is intercrossed by multiple footpaths.	
<b>Townscape &amp; street furniture</b>	Bins and seats are provided in front of the units, which has an active frontage. Ample seating is also provided for customers of the pub fronting and within the recreation space.	
<b>Perception of safety &amp; evidence of crime</b>	Though not facing the main road, the frontage of the shops is visible from surrounding uses and there is no evidence of anti-social behaviour. The residential occupation of the floor above the units adds to the visual surveillance of the area.	

<b>Development opportunities &amp; recent investment</b>	There is no sign of recent investment, but the units appear to be well maintained. There is scope for aesthetic improvements, and the recreation space would also benefit from environmental improvements which would improve the centre given its central location.	
<b>Recommendations</b>		
<b>Summary (SWOT)</b>	<b>Strengths</b> <ul style="list-style-type: none"> <li>▪ Central recreation space provides focal point for centre</li> <li>▪ Units and Pub appear to be popular amongst local residents</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>▪ Dated appearance of the units</li> <li>▪ Back to front nature of the shop frontages hinders opportunity for passing trade.</li> </ul>
	<b>Opportunities</b> <ul style="list-style-type: none"> <li>▪ Environmental improvements to the recreation space</li> <li>▪ Aesthetic improvement to shop units</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>▪ Limited convenience offer; potential for competition from elsewhere</li> <li>▪ Competition from easily accessible out of town comparison shopping</li> </ul>
<b>Recommendation</b>	Good health – The centre evidently provides a key role for the local community, but would benefit from environment and aesthetic improvements.	





### Uses by category

Category	No. of units	% of units
Convenience	1	8
Comparison	0	0
Services	11	92
Vacant	0	0
<b>Total</b>	<b>12</b>	

**Foodstores** A Filco supermarket and a Lifestyle shop incorporating a post office.

**Other retail uses & markets** An ice cream parlour

**Other services** A club, 2 hair salons, a tanning centre, betting shop, opticians, GP surgery, a clinic and a community centre

### Accessibility

**Public transport & PTAL** The centre is well served by bus stops on most of the surrounding main roads, providing easy access to the range of uses within the centre.

**Car parking** Car parking is provided at the Filco store, the surgery and the club, though it is not immediately clear whether this is for general public use. There are segregated laybys in front of some of the units and ample on-street parking in the immediate vicinity.

**Pedestrian linkages & disabled access** Surrounding routes have been traffic calmed with dropped kerbs and signalised pedestrian crossings provided at all junctions. Disabled parking spaces are provided in front of the Filco store and surgery together with ramped access. Most of the retail units have wide pavements in front of them, which is used informally for parking in some cases.

### Environmental quality

**Retail unit size & quality** The retail units are small in size, other than Filco and the community which reflect their purpose built use. Although somewhat dated, the retail units in both clusters provide active shop frontages and operate in conjunction with one another. The built fabric of the Filco supermarket in particular is in need of improvement. Its location acts as the hub of the centre, but the shop lacks an identifiable frontage. The access is to the side and the rear of the store fronting onto Heol Canola is characterised by a lack of window space and roller shutters. It is also adjacent to electricity generators.

**Access to green space** The centre is located in physically separate clusters on the road side adjacent to various traffic junctions. The surrounding area is characterised by high density residential development and as a result there is no green open space in the immediate vicinity.

**Townscape & street furniture** The depth of the pavements outside most of the retail units is an attractive feature that allows for street furniture associated with individual units, but there is also evidence of vehicular conflict. There is little else to soften up the streetscene.

**Perception of safety & evidence of crime** The centre's various uses are operational at various times of the day and are located in a high density residential area and adjacent to several busy roads. This all ensures there is a constant level of surveillance and few evident signs of anti-social behaviour. Some of the community uses

	are characterised by anti-vandal security fencing which detracts from the appearance of the centre.				
<b>Development opportunities &amp; recent investment</b>	The surrounding highway network has been traffic calmed recently to ease pedestrian movements in and around the centre. Aesthetic improvements to the built fabric of the units would add to its appeal.				
<b>Recommendations</b>					
<b>Summary (SWOT)</b>	<table border="1"> <tr> <td> <p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>▪ Strong mix of uses reduces the need to travel</li> <li>▪ Traffic calming scheme has improved pedestrian safety</li> </ul> </td> <td> <p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>▪ Dispersed nature of centre encourages vehicular access</li> <li>▪ Vehicular conflict evident due to busy approach roads</li> </ul> </td> </tr> <tr> <td> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>▪ Aesthetic improvements to units</li> <li>▪ Landscaping scheme to grass verges</li> </ul> </td> <td> <p><b>Threats</b></p> <ul style="list-style-type: none"> <li>▪ Competing centres nearby</li> <li>▪ Dispersed nature of centre may attract desire to change uses to residential</li> </ul> </td> </tr> </table>	<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>▪ Strong mix of uses reduces the need to travel</li> <li>▪ Traffic calming scheme has improved pedestrian safety</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>▪ Dispersed nature of centre encourages vehicular access</li> <li>▪ Vehicular conflict evident due to busy approach roads</li> </ul>	<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>▪ Aesthetic improvements to units</li> <li>▪ Landscaping scheme to grass verges</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>▪ Competing centres nearby</li> <li>▪ Dispersed nature of centre may attract desire to change uses to residential</li> </ul>
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<b>Recommendation</b>	Good health – the centre has a good range of community services and no vacancies. Whilst not having the feel of a traditional centre with most of the units located in physically separate clusters, the centre is evidently well used and worthy of continued allocation as it helps reduce the need to travel to larger multiple convenience stores nearby.				



### Uses by category

Category	No. of units	% of units
Convenience	1	33
Comparison	0	0
Services	2	67
Vacant	0	0
<b>Total</b>	<b>3</b>	
<b>Foodstores</b>	A Premier supermarket	
<b>Other retail uses &amp; markets</b>	A sandwich shop	
<b>Other services</b>	A pub and a health & beauty salon	

### Accessibility

<b>Public transport &amp; PTAL</b>	Though not immediately located on a main road, the centre is a short walk from Mervyn Way, Greenacre Drive and Hendre Road, all of which have bus stops.
<b>Car parking</b>	The area to the rear of the units accommodates residential parking. There is a layby on Verland Way and an informal parking area accessed of Alyson Way, both of which provide adequate off-street parking for the number of units.
<b>Pedestrian linkages &amp; disabled access</b>	The approaches to the centre are well paved. One row of shops is at a higher level than the other but ramped access is provided if accessed from Verland Way.

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<b>Retail unit size &amp; quality</b>	The purpose built centre consists of small units located below residential accommodation and arranged in 2 linear rows either side of a central paved area. Some of the units have been amalgamated together to house the Premier shop and the Tavern bar. The units could benefit from visual improvements but still provide the function for which they were built.
<b>Access to green space</b>	There is no immediate access to green space as the centre is located in a high density residential area.
<b>Townscape &amp; street furniture</b>	Litter bins, a post box and a phone are provided within the centre. The recent bar/restaurant development has led to the provision of seating serving its customers.
<b>Perception of safety &amp; evidence of crime</b>	The positioning of the units on either side of a central paved area affords a good level of visual surveillance. The presence of residential units above enhances the perception of safety and there is no evidence of anti-social behaviour.
<b>Development opportunities &amp; recent investment</b>	2 of the units have been converted into a restaurant/bar in the last few years, which appears to be well used. The centre as a whole would benefit from visual improvement and planting.

### Recommendations

<b>Summary (SWOT)</b>	<b>Strengths</b> <ul style="list-style-type: none"> <li>▪ Range of uses provide day to day needs</li> <li>▪ Pub ensures visual surveillance beyond normal opening hours</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>▪ Limited visual appearance from main routes to attract passing trade</li> <li>▪ Limited number of different uses – further fragmentation will question its purpose as a centre</li> </ul>
	<b>Opportunities</b> <ul style="list-style-type: none"> <li>▪ Planting would break up urban form</li> <li>▪ Visual improvements to buildings</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>▪ Previous proposals for additional residential development have already been refused</li> <li>▪ Competition from bigger centres nearby</li> </ul>
<b>Recommendation</b>	<p>Good health – The centre still performs the function for which it was built i.e. providing for the day to day needs of the local community. The number of active uses has reduced in recent years, but this has been a result in the change in nature of businesses occupying them rather than an increase in vacancies.</p>	



### Uses by category

Category	No. of units	% of units
Convenience	1	17
Comparison	0	0
Services	5	83
Vacant	0	0
<b>Total</b>	<b>6</b>	

**Foodstores** Londis

**Other retail uses & markets** N/A

**Other services** A health & beauty salon, community centre, youth centre, community hub and a takeaway unit

### Accessibility

**Public transport & PTAL** Bus stops are easily accessible on Quarella Rd/Wildmill Lane and Wildmill train station is a short walking distance away.

**Car parking** There are purpose built car parking facilities adjacent to the centre and on the approach.

**Pedestrian linkages & disabled access** The centre is well served by pedestrian footpaths and all units have flat access on approaches with dropped kerbs at appropriate locations. Due to the design of the estate, the footpaths do not always follow the route of the roads serving the area.

### Environmental quality

**Retail unit size & quality** The units vary in size due to the different nature of the various uses. They would all benefit from aesthetic improvements, with a generally run down appearance. There is little by way of active shop frontages that would aid the visual appeal of the centre, and there is no sense of arrival at most of the units with the buildings being positioned side on or rear facing. The Londis store, for example, has a service entrance at the forefront of the building and a customer entrance to the side.

**Access to green space** The centre is located within a densely populated residential area that has been designed to incorporate communal green areas amongst clusters of residential units. There is a small equipped children's play area to the rear of the centre.

**Townscape & street furniture** There is a small planting area, a post box, payphone, litter bins, street lamps and limited seating. The centre is dominated however by the location of a large electricity pylon which restricts the parking provision.

**Perception of safety & evidence of crime** Most of the units are characterised by roller shutters, which is heightened by the fact that the units lack a defined frontage. The centre is surrounded by residential units so has a high degree of visual surveillance, but the design of the estate means there are narrow walkways and enclosed bin stores and garages that can lead to a sense of intimidation.

**Development opportunities & recent investment** Recent improvements have been made to upgrade the appearance of some of the residential units. It is to be hoped similar investment can be made to the built fabric of the local centre.

### Recommendations

Summary (SWOT)	Strengths	Weaknesses
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	<ul style="list-style-type: none"> <li>▪ Lack of vacant units</li> <li>▪ Range of community uses</li> </ul>	<ul style="list-style-type: none"> <li>▪ Position of pylon limits scope of possible improvements</li> <li>▪ Side-on/rear facing buildings</li> </ul>
	<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>▪ Location of rail station</li> <li>▪ Recent investment in housing stock</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>▪ Unattractive environment</li> <li>▪ Competition for convenience goods from nearby centres</li> </ul>
<b>Recommendation</b>	<p>Good health – fulfils its role as a purpose built centre to provide local services for residents. The centre does need investment to improve its visual appearance.</p>	



# Appendix C Retail capacity tables

**Table 1: Population 2018 - 2033**

<b>Year</b>	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Zone 5</b>	<b>Zone 6</b>	<b>Zone 7</b>	<b>Zone 8</b>	<b>Total</b>
<b>2017</b>	45,820	28,742	28,991	31,514	42,581	47,297	18,975	16,114	260,034
<b>2018</b>	46,327	29,016	29,289	31,831	42,876	47,629	19,101	16,241	262,310
<b>2019</b>	46,474	29,069	29,387	31,943	42,966	47,728	19,106	16,257	262,930
<b>2020</b>	46,636	29,104	29,496	32,036	43,044	47,849	19,108	16,291	263,564
<b>2021</b>	46,798	29,149	29,584	32,137	43,156	47,949	19,127	16,304	264,204
<b>2022</b>	46,968	29,193	29,655	32,251	43,259	48,041	19,151	16,343	264,861
<b>2023</b>	47,149	29,247	29,695	32,353	43,370	48,140	19,161	16,367	265,482
<b>2024</b>	47,280	29,304	29,780	32,453	43,521	48,257	19,142	16,387	266,124
<b>2025</b>	47,408	29,323	29,872	32,574	43,624	48,321	19,155	16,433	266,710
<b>2026</b>	47,537	29,343	29,950	32,663	43,734	48,399	19,166	16,470	267,262
<b>2027</b>	47,634	29,374	30,026	32,759	43,871	48,473	19,154	16,503	267,794
<b>2028</b>	47,739	29,383	30,097	32,821	43,982	48,549	19,128	16,560	268,259
<b>2029</b>	47,836	29,374	30,186	32,874	44,053	48,633	19,126	16,586	268,668
<b>2030</b>	47,937	29,358	30,262	32,931	44,116	48,697	19,137	16,606	269,044
<b>2031</b>	48,043	29,339	30,313	33,004	44,180	48,760	19,141	16,630	269,410
<b>2032</b>	48,123	29,334	30,350	33,062	44,223	48,824	19,130	16,648	269,694
<b>2033</b>	48,220	29,322	30,395	33,090	44,279	48,891	19,110	16,656	269,963
<b>Growth 2018-2033</b>	1,893	306	1,106	1,259	1,403	1,262	9	415	7,653

Source: Population derived from Experian Retail Planner MMG3 2018

**Table 2: Convenience expenditure****Convenience per person 2018 - 2033 (£)**

	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Zone 5</b>	<b>Zone 6</b>	<b>Zone 7</b>	<b>Zone 8</b>
<b>2017</b>	2,072	2,246	1,968	2,099	2,360	1,954	1,965	2,097
<b>Exc. SFT</b>								
<b>2017</b>	2,002	2,170	1,901	2,028	2,280	1,887	1,898	2,025
<b>2018</b>	2,140	2,320	2,032	2,168	2,438	2,018	2,029	2,165
<b>2023</b>	2,153	2,334	2,044	2,181	2,452	2,030	2,041	2,178
<b>2028</b>	2,153	2,334	2,044	2,181	2,452	2,030	2,041	2,178
<b>2033</b>	2,157	2,339	2,048	2,185	2,457	2,034	2,045	2,183

**Total convenience 2018 - 2033 (£m)**

	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Zone 5</b>	<b>Zone 6</b>	<b>Zone 7</b>	<b>Zone 8</b>	<b>Total</b>
<b>2018</b>	99.2	67.3	59.5	69.0	104.5	96.1	38.8	35.2	569.6
<b>2023</b>	101.5	68.3	60.7	70.6	106.4	97.7	39.1	35.7	579.9
<b>2028</b>	102.8	68.6	61.5	71.6	107.9	98.6	39.0	36.1	586.0
<b>2033</b>	104.0	68.6	62.3	72.3	108.8	99.4	39.1	36.4	590.9

**Total convenience in BCBC and elsewhere in the study area 2018-2033 (£m)**

	<b>Zones</b>		
	<b>BCBC</b>	<b>outside</b>	
	<b>Zones (1-4)</b>	<b>BCBC (5-8)</b>	<b>Total</b>
<b>2018</b>	295.0	274.6	569.6
<b>2023</b>	301.1	278.9	579.9
<b>2028</b>	304.5	281.5	586.0
<b>2033</b>	307.2	283.7	590.9
<b>Growth 2018-2033</b>	12.2	9.1	21.3

## Notes:

Per capita expenditure by zone derived from Experian Retail Planner MMG3 2018

Growth rates and SFT deductions derived from Experian Retail Planner Briefing Note 16 (2018)

Total expenditure is a product of per capita expenditure and Table 1

Prices 2017

**Table 3: Comparison expenditure****Comparison per person 2018 - 2033 (£)**

	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Zone 5</b>	<b>Zone 6</b>	<b>Zone 7</b>	<b>Zone 8</b>
<b>2017</b>	3,356	3,646	2,600	3,350	4,099	2,653	2,425	3,072
<b>Exc. SFT</b>								
<b>2017</b>	2,835	3,080	2,197	2,830	3,464	2,242	2,049	2,596
<b>2018</b>	3,783	4,109	2,930	3,776	4,621	2,991	2,733	3,463
<b>2023</b>	4,147	4,506	3,213	4,140	5,067	3,279	2,997	3,797
<b>2028</b>	4,798	5,213	3,718	4,790	5,862	3,794	3,468	4,393
<b>2033</b>	5,579	6,061	4,322	5,569	6,816	4,411	4,032	5,108

**Total comparison 2018 - 2033 (£)**

	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Zone 5</b>	<b>Zone 6</b>	<b>Zone 7</b>	<b>Zone 8</b>	<b>Total</b>
<b>2018</b>	175.2	119.2	85.8	120.2	198.1	142.4	52.2	56.2	949.5
<b>2023</b>	195.5	131.8	95.4	133.9	219.7	157.9	57.4	62.1	1,053.8
<b>2028</b>	229.1	153.2	111.9	157.2	257.8	184.2	66.3	72.8	1,232.5
<b>2033</b>	269.0	177.7	131.4	184.3	301.8	215.7	77.0	85.1	1,442.0

**Total convenience in BCBC and elsewhere in the study area 2018-2033 (£m)**

	<b>BCBC Zones (1- 4)</b>	<b>Zones outside BCBC (5- 8)</b>	<b>Total</b>
<b>2018</b>	500.5	449.0	949.5
<b>2023</b>	556.7	497.2	1,053.8
<b>2028</b>	651.4	581.1	1,232.5
<b>2033</b>	762.4	679.6	1,442.0
<b>Growth 2018 - 2033</b>	261.9	230.5	492.5

## Notes:

Per capita expenditure by zone derived from Experian Retail Planner MMG3 2018

Growth rates and SFT deductions derived from Experian Retail Planner Briefing Note 16 (2018)

Total expenditure is a product of per capita expenditure and Table 1

Prices 2017

**Table 4: Convenience market shares %**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
<b>Zone 1 total</b>	79.7%	41.4%	13.2%	53.5%	17.3%	0.2%	8.6%	19.0%
Aldi, Brackla Street, Bridgend	7.4%	1.8%	1.9%	7.8%	3.3%	0.0%	0.3%	5.2%
Asda, Coychurch Road, Bridgend	18.9%	4.7%	2.0%	19.5%	0.7%	0.0%	0.5%	1.7%
Bridgend out of centre	0.6%	0.0%	0.5%	1.9%	0.0%	0.0%	0.5%	0.5%
Bridgend Town Centre	7.0%	1.3%	1.2%	3.0%	0.0%	0.0%	0.2%	0.6%
Iceland, Bracklea Street Shopping Centre, Bridgend	0.1%	0.3%	0.0%	0.5%	0.0%	0.0%	4.2%	0.0%
Lidl, Bridgend Retail Park, Bridgend	7.6%	6.9%	1.5%	4.6%	5.6%	0.0%	0.4%	1.3%
Other, zone 1	0.9%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Tesco Express, District Centre Broadlands, Bridgend	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Cowbridge Road, Bridgend	18.1%	20.7%	3.3%	9.9%	7.4%	0.2%	0.0%	8.9%
Tesco, Brewery Lane, Bridgend	17.1%	5.5%	2.8%	6.2%	0.3%	0.0%	2.5%	0.8%
<b>Zone 2 total</b>	0.1%	27.4%	0.0%	0.7%	0.1%	0.0%	0.3%	1.5%
Co-op, Lias Road, Porthcawl	0.0%	12.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Other, zone 2	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Porthcawl	0.1%	13.9%	0.0%	0.7%	0.1%	0.0%	0.3%	1.3%
<b>Zone 3 total</b>	0.0%	0.2%	71.2%	1.9%	0.0%	16.5%	0.9%	2.8%
Aldi, Llynfi Road, Maesteg	0.0%	0.0%	20.5%	0.6%	0.0%	4.0%	0.0%	0.2%
Asda, Castle Street, Maesteg	0.0%	0.0%	10.7%	0.0%	0.0%	1.0%	0.9%	0.0%
Maesteg	0.0%	0.0%	13.9%	0.5%	0.0%	1.0%	0.0%	0.4%
Pontycymer	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Castle Street, Maesteg	0.0%	0.2%	26.0%	0.8%	0.0%	10.5%	0.0%	2.2%
<b>Zone 4 total</b>	7.0%	9.1%	6.5%	29.1%	5.3%	0.2%	0.9%	6.2%
Bridgend Designer Outlet (McArthur Glen)	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
Lidl, Broadview, Tondy, Bridgend	0.9%	0.4%	3.7%	14.4%	2.1%	0.0%	0.3%	1.8%
McArthurGlen Designer Outlet, Bridgend	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other, zone 4	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.2%	0.0%
Sainsbury's, The Derwen, Bridgend	6.2%	8.7%	2.9%	12.1%	3.2%	0.2%	0.4%	4.3%
<b>Zone 5 total</b>	10.5%	3.4%	2.0%	12.8%	60.1%	4.3%	10.2%	2.3%
Aldi, Glamorgan Vale Retail Park, Llantrisant	0.0%	0.0%	0.0%	0.0%	6.5%	0.1%	3.3%	1.5%
Cowbridge	7.1%	1.4%	0.0%	0.6%	11.1%	0.0%	0.0%	0.1%
Other, zone 5	0.0%	0.0%	0.0%	0.6%	1.4%	0.0%	0.0%	0.0%
Pencoed	2.4%	0.0%	0.5%	9.1%	1.9%	0.0%	0.0%	0.1%
Pontyclun	1.0%	1.4%	1.2%	0.8%	10.8%	0.1%	0.7%	0.0%
Talbot Green	0.0%	0.3%	0.2%	0.9%	1.7%	0.0%	0.3%	0.0%
Tesco Extra, Green Park, Talbot Green, Pontyclun	0.0%	0.4%	0.0%	0.8%	26.7%	4.2%	5.9%	0.6%
<b>Zone 6 total</b>	0.0%	0.0%	0.0%	0.0%	0.6%	14.5%	45.0%	0.0%
Asda, Colliers Way, Tonypany	0.0%	0.0%	0.0%	0.0%	0.6%	14.5%	30.8%	0.0%
Other, zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%
Porth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%
Tonypany	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.0%	0.0%
Tonyrefail	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%
<b>Zone 7 total</b>	0.0%	0.0%	0.2%	0.0%	0.0%	44.4%	14.1%	0.5%
Co-op, Station Road, Treorchy	0.0%	0.0%	0.0%	0.0%	0.0%	9.0%	3.1%	0.0%
Lidl, High Street, Treorchy	0.0%	0.0%	0.2%	0.0%	0.0%	20.2%	9.3%	0.5%
Other, zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%
Treorchy	0.0%	0.0%	0.0%	0.0%	0.0%	12.6%	1.7%	0.0%
<b>Zone 8 total</b>	0.3%	13.3%	0.0%	0.6%	0.4%	1.9%	0.0%	43.7%
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.3%	13.0%	0.0%	0.6%	0.1%	0.0%	0.0%	34.9%
Kenfig Hill	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%
Other, zone 8	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%
Port Talbot	0.0%	0.2%	0.0%	0.0%	0.3%	1.9%	0.0%	1.9%
<b>Outside study area total</b>	2.4%	5.2%	6.9%	1.5%	16.1%	18.0%	20.0%	24.0%
Cardiff out of centre	0.5%	1.6%	0.4%	0.6%	4.4%	1.3%	0.6%	0.0%
Other outside study area	0.1%	1.3%	1.6%	0.9%	2.9%	5.8%	6.4%	1.9%
Port Talbot	1.8%	2.3%	4.9%	0.0%	8.8%	8.2%	2.7%	22.1%
Porth	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	10.4%	0.0%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Notes:

Market shares derived from NEMS household survey (January 2019)

**Table 5: Convenience spending patterns 2018 £m**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
<b>Zone 1</b>	<b>79.0</b>	<b>27.9</b>	<b>7.8</b>	<b>36.9</b>	<b>18.1</b>	<b>0.2</b>	<b>3.3</b>	<b>6.7</b>	<b>179.9</b>
Aldi, Brackla Street, Bridgend	7.3	1.2	1.1	5.4	3.5	0.0	0.1	1.8	20.4
Asda, Coychurch Road, Bridgend	18.8	3.1	1.2	13.5	0.7	0.0	0.2	0.6	38.0
Bridgend out of centre	0.6	0.0	0.3	1.3	0.0	0.0	0.2	0.2	2.6
Bridgend Town Centre	7.0	0.9	0.7	2.1	0.0	0.0	0.1	0.2	10.9
Iceland, Bracklea Street Shopping Centre, Bridgend	0.1	0.2	0.0	0.4	0.0	0.0	1.6	0.0	2.3
Lidl, Bridgend Retail Park, Bridgend	7.6	4.7	0.9	3.2	5.9	0.0	0.1	0.5	22.7
Other, zone 1	0.9	0.2	0.0	0.0	0.0	0.0	0.0	0.0	1.1
Tesco Express, District Centre Broadlands, Bridgend	1.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.9
Tesco Extra, Cowbridge Road, Bridgend	17.9	13.9	1.9	6.9	7.8	0.2	0.0	3.1	51.7
Tesco, Brewery Lane, Bridgend	17.0	3.7	1.7	4.3	0.3	0.0	1.0	0.3	28.2
<b>Zone 2</b>	<b>0.1</b>	<b>18.4</b>	<b>0.0</b>	<b>0.5</b>	<b>0.1</b>	<b>0.0</b>	<b>0.1</b>	<b>0.5</b>	<b>19.8</b>
Co-op, Lias Road, Porthcawl	0.0	8.5	0.0	0.0	0.0	0.0	0.0	0.1	8.6
Other, zone 2	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.6
Porthcawl	0.1	9.3	0.0	0.5	0.1	0.0	0.1	0.4	10.6
<b>Zone 3</b>	<b>0.0</b>	<b>0.1</b>	<b>42.4</b>	<b>1.3</b>	<b>0.0</b>	<b>15.8</b>	<b>0.3</b>	<b>1.0</b>	<b>60.9</b>
Aldi, Llynfi Road, Maesteg	0.0	0.0	12.2	0.4	0.0	3.9	0.0	0.1	16.5
Asda, Castle Street, Maesteg	0.0	0.0	6.4	0.0	0.0	0.9	0.3	0.0	7.7
Maesteg	0.0	0.0	8.3	0.4	0.0	0.9	0.0	0.1	9.7
Pontycymer	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1
Tesco, Castle Street, Maesteg	0.0	0.1	15.5	0.5	0.0	10.1	0.0	0.8	27.0
<b>Zone 4</b>	<b>7.0</b>	<b>6.2</b>	<b>3.9</b>	<b>20.1</b>	<b>5.6</b>	<b>0.2</b>	<b>0.3</b>	<b>2.2</b>	<b>45.4</b>
Bridgend Designer Outlet (McArthur Glen)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Lidl, Broadview, Tondu, Bridgend	0.9	0.3	2.2	9.9	2.2	0.0	0.1	0.6	16.2
McArthurGlen Designer Outlet, Bridgend	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other, zone 4	0.0	0.0	0.0	1.8	0.0	0.0	0.1	0.0	1.8
Sainsbury's, The Derwen, Bridgend	6.1	5.9	1.7	8.4	3.4	0.2	0.2	1.5	27.3
<b>Zone 5</b>	<b>10.4</b>	<b>2.3</b>	<b>1.2</b>	<b>8.8</b>	<b>62.9</b>	<b>4.1</b>	<b>3.9</b>	<b>0.8</b>	<b>94.5</b>
Aldi, Glamorgan Vale Retail Park, Llantrisant	0.0	0.0	0.0	0.0	6.8	0.1	1.3	0.5	8.7
Cowbridge	7.0	0.9	0.0	0.4	11.6	0.0	0.0	0.0	20.0
Other, zone 5	0.0	0.0	0.0	0.4	1.4	0.0	0.0	0.0	1.8
Pencoed	2.3	0.0	0.3	6.3	1.9	0.0	0.0	0.0	10.9
Pontyclun	1.0	1.0	0.7	0.5	11.3	0.1	0.3	0.0	14.9
Talbot Green	0.0	0.2	0.1	0.6	1.8	0.0	0.1	0.0	2.8
Tesco Extra, Green Park, Talbot Green, Pontyclun	0.0	0.3	0.0	0.6	27.9	4.0	2.3	0.2	35.2
<b>Zone 6</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.6</b>	<b>13.9</b>	<b>17.5</b>	<b>0.0</b>	<b>32.0</b>
Asda, Colliers Way, Tonypany	0.0	0.0	0.0	0.0	0.6	13.9	11.9	0.0	26.5
Other, zone 6	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0	0.8
Porth	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	1.0
Tonypany	0.0	0.0	0.0	0.0	0.0	0.0	3.5	0.0	3.5
Tonyrefail	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.2
<b>Zone 7</b>	<b>0.0</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.0</b>	<b>42.7</b>	<b>5.5</b>	<b>0.2</b>	<b>48.5</b>
Co-op, Station Road, Treorchy	0.0	0.0	0.0	0.0	0.0	8.6	1.2	0.0	9.8
Lidl, High Street, Treorchy	0.0	0.0	0.1	0.0	0.0	19.4	3.6	0.2	23.3
Other, zone 7	0.0	0.0	0.0	0.0	0.0	2.6	0.0	0.0	2.6
Treorchy	0.0	0.0	0.0	0.0	0.0	12.1	0.7	0.0	12.8
<b>Zone 8</b>	<b>0.3</b>	<b>9.0</b>	<b>0.0</b>	<b>0.4</b>	<b>0.4</b>	<b>1.8</b>	<b>0.0</b>	<b>15.4</b>	<b>27.2</b>
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.3	8.7	0.0	0.4	0.1	0.0	0.0	12.3	21.7
Kenfig Hill	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2	1.3
Other, zone 8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2	1.3
Port Talbot	0.0	0.1	0.0	0.0	0.3	1.8	0.0	0.7	3.0
<b>Outside study area</b>	<b>2.4</b>	<b>3.5</b>	<b>4.1</b>	<b>1.0</b>	<b>16.8</b>	<b>17.3</b>	<b>7.8</b>	<b>8.5</b>	<b>61.4</b>
Cardiff out of centre	0.5	1.0	0.2	0.4	4.6	1.2	0.2	0.0	8.3
Other outside study area	0.1	0.9	1.0	0.6	3.1	5.6	2.5	0.7	14.4
Port Talbot	1.8	1.5	2.9	0.0	9.2	7.9	1.0	7.8	32.1
Porth	0.0	0.0	0.0	0.0	0.0	2.6	4.0	0.0	6.6
<b>Total</b>	<b>99.2</b>	<b>67.3</b>	<b>59.5</b>	<b>69.0</b>	<b>104.5</b>	<b>96.1</b>	<b>38.8</b>	<b>35.2</b>	<b>569.6</b>

## Notes:

Per capita expenditure by zone derived from Experian Retail Planner MMG3 2018

Growth rates and SFT deductions derived from Experian Retail Planner Briefing Note 16 (2018)

Total expenditure is a product of total expenditure (Table 2) and market shares (Table 4)

Prices 2017

**Table 6: Comparison market shares %**

	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Zone 5</b>	<b>Zone 6</b>	<b>Zone 7</b>	<b>Zone 8</b>
<b>Zone 1</b>	56.9%	37.8%	32.7%	48.5%	9.2%	13.1%	5.3%	35.2%
Bridgend out of centre	3.9%	7.4%	0.0%	2.5%	0.1%	0.6%	0.7%	1.4%
Bridgend Retail Park, Cowbridge Road, Bridgend	10.2%	8.7%	1.6%	5.5%	1.8%	5.5%	1.6%	6.6%
Bridgend Town Centre	39.2%	16.3%	29.0%	36.6%	6.0%	6.1%	1.7%	25.3%
Other, zone 1	0.4%	1.7%	0.0%	0.1%	0.0%	0.0%	0.0%	0.1%
Waterton Retail Park, Waterton Road, Bridgend	3.0%	3.7%	2.2%	3.9%	1.2%	0.7%	1.4%	1.9%
<b>Zone 2</b>	0.4%	13.5%	0.0%	0.5%	0.1%	0.0%	0.8%	1.5%
Other, zone 2	0.0%	0.1%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%
Porthcawl	0.4%	13.4%	0.0%	0.2%	0.1%	0.0%	0.8%	1.5%
<b>Zone 3</b>	0.1%	0.0%	17.9%	0.2%	0.1%	0.1%	7.1%	0.5%
Maesteg	0.1%	0.0%	17.9%	0.0%	0.0%	0.0%	7.1%	0.5%
Pontycymer	0.0%	0.0%	0.0%	0.2%	0.1%	0.1%	0.0%	0.0%
<b>Zone 4</b>	14.2%	9.9%	7.6%	18.2%	6.7%	5.6%	4.9%	7.0%
Aberkenfig (Valleys Gateway)	1.1%	0.0%	0.7%	2.3%	0.8%	0.0%	0.1%	0.3%
McArthurGlen Designer Outlet, Bridgend	12.9%	9.9%	6.7%	15.2%	5.9%	5.6%	4.6%	6.4%
Other, zone 4	0.2%	0.0%	0.2%	0.7%	0.0%	0.0%	0.1%	0.2%
<b>Zone 5</b>	6.1%	3.9%	4.1%	8.6%	22.1%	42.0%	9.4%	5.3%
Cowbridge	1.5%	0.7%	0.3%	0.1%	0.2%	5.6%	0.0%	0.0%
Llantrisant	3.8%	1.6%	1.4%	3.0%	6.7%	2.5%	3.2%	0.3%
Other, zone 5	0.2%	0.6%	0.2%	1.5%	0.9%	1.9%	0.2%	0.0%
Pontyclun	0.1%	0.8%	0.0%	0.0%	2.7%	10.6%	1.6%	2.2%
Talbot Green Shopping Park	0.5%	0.4%	2.0%	2.7%	8.9%	11.7%	2.1%	2.3%
Talbot Green Town Centre	0.0%	0.0%	0.1%	1.3%	2.7%	9.7%	2.3%	0.4%
<b>Zone 6</b>	0.0%	0.0%	0.9%	0.0%	17.0%	0.9%	5.7%	0.0%
Asda, Colliers Way, Tonypanydy	0.0%	0.0%	0.7%	0.0%	4.3%	0.9%	2.1%	0.0%
Other, zone 6	0.0%	0.0%	0.1%	0.0%	2.3%	0.0%	2.0%	0.0%
Tonypanydy	0.0%	0.0%	0.1%	0.0%	10.4%	0.0%	1.6%	0.0%
<b>Zone 7</b>	0.0%	0.0%	0.1%	0.0%	3.9%	0.0%	15.8%	0.1%
Other, zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.1%
Treorchy	0.0%	0.0%	0.1%	0.0%	3.9%	0.0%	14.8%	0.0%
<b>Zone 8</b>	0.4%	5.5%	2.8%	1.4%	0.5%	0.7%	9.1%	25.8%
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%
Kenfig Hill	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	2.8%
Other, zone 8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Port Talbot	0.0%	1.1%	2.7%	0.0%	0.0%	0.7%	9.1%	14.7%
Pyle	0.4%	3.5%	0.2%	0.6%	0.4%	0.0%	0.0%	4.3%
<b>Outside study area</b>	22.0%	29.3%	33.9%	22.6%	40.5%	37.6%	41.9%	24.6%
Cardiff	17.4%	25.7%	22.8%	19.8%	13.2%	32.0%	10.3%	9.3%
Merthyr Tydfil	0.0%	0.0%	0.2%	0.0%	2.6%	0.0%	10.9%	0.3%
Neath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	2.2%
Other outside area	2.2%	2.4%	0.3%	1.2%	4.2%	3.3%	3.7%	0.7%
Pontypridd	0.0%	0.0%	1.3%	0.2%	18.6%	0.8%	8.3%	0.0%
Swansea	2.4%	1.2%	9.4%	1.4%	1.9%	1.5%	7.3%	12.2%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Notes:

Market shares derived from NEMS household survey (January 2019)



**Table 7: Comparison spending patterns 2018 £m**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
<b>Zone 1</b>	99.7	45.1	28.1	58.3	18.2	18.6	2.8	19.8	290.5
Bridgend out of centre	6.9	8.8	0.0	3.0	0.1	0.9	0.4	0.8	20.9
Bridgend Retail Park, Cowbridge Road, Bridgend	18.0	10.4	1.3	6.6	3.6	7.9	0.8	3.7	52.3
Bridgend Town Centre	68.8	19.5	24.9	43.9	12.0	8.7	0.9	14.2	192.9
Other, zone 1	0.8	2.1	0.0	0.1	0.0	0.0	0.0	0.1	3.0
Waterton Retail Park, Waterton Road, Bridgend	5.3	4.4	1.9	4.6	2.4	1.1	0.7	1.1	21.5
<b>Zone 2</b>	0.7	16.1	0.0	0.6	0.3	0.0	0.4	0.8	18.9
Other, zone 2	0.0	0.2	0.0	0.3	0.0	0.0	0.0	0.0	0.5
Porthcawl	0.7	15.9	0.0	0.3	0.3	0.0	0.4	0.8	18.4
<b>Zone 3</b>	0.2	0.0	15.3	0.3	0.1	0.1	3.7	0.3	20.0
Maesteg	0.2	0.0	15.3	0.0	0.0	0.0	3.7	0.3	19.5
Pontycymer	0.0	0.0	0.0	0.3	0.1	0.1	0.0	0.0	0.5
<b>Zone 4</b>	24.8	11.8	6.5	21.9	13.3	8.0	2.5	3.9	92.9
Aberkenfig (Valleys Gateway)	1.9	0.0	0.6	2.8	1.5	0.0	0.1	0.2	7.1
McArthurGlen Designer Outlet, Bridgend	22.6	11.8	5.8	18.3	11.7	8.0	2.4	3.6	84.2
Other, zone 4	0.3	0.0	0.2	0.9	0.0	0.0	0.1	0.1	1.6
<b>Zone 5</b>	10.7	4.7	3.5	10.4	43.8	59.9	4.9	3.0	140.8
Cowbridge	2.6	0.8	0.3	0.1	0.5	8.0	0.0	0.0	12.3
Llantrisant	6.6	1.9	1.2	3.6	13.2	3.6	1.7	0.2	31.9
Other, zone 5	0.4	0.7	0.2	1.8	1.7	2.7	0.1	0.0	7.5
Pontyclun	0.2	0.9	0.0	0.0	5.4	15.1	0.8	1.3	23.7
Talbot Green Shopping Park	0.9	0.4	1.8	3.3	17.6	16.6	1.1	1.3	43.0
Talbot Green Town Centre	0.0	0.0	0.1	1.6	5.4	13.9	1.2	0.2	22.3
<b>Zone 6</b>	0.0	0.0	0.8	0.0	33.6	1.3	3.0	0.0	38.7
Asda, Colliers Way, Tonypandy	0.0	0.0	0.6	0.0	8.4	1.3	1.1	0.0	11.4
Other, zone 6	0.0	0.0	0.1	0.0	4.6	0.0	1.0	0.0	5.7
Tonypandy	0.0	0.0	0.0	0.0	20.6	0.0	0.8	0.0	21.5
<b>Zone 7</b>	0.0	0.0	0.1	0.0	7.8	0.0	8.2	0.1	16.2
Other, zone 7	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.1	0.6
Treorchy	0.0	0.0	0.1	0.0	7.8	0.0	7.7	0.0	15.6
<b>Zone 8</b>	0.6	6.6	2.4	1.6	0.9	1.0	4.8	14.5	32.4
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.0	1.1	0.0	0.0	0.0	0.0	0.0	2.2	3.3
Kenfig Hill	0.0	0.0	0.0	0.9	0.0	0.0	0.0	1.6	2.5
Other, zone 8	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.1
Port Talbot	0.0	1.3	2.3	0.0	0.1	1.0	4.8	8.2	17.6
Pyle	0.6	4.2	0.1	0.7	0.8	0.0	0.0	2.4	8.9
<b>Outside study area</b>	38.5	34.9	29.1	27.2	80.2	53.5	21.9	13.8	299.2
Cardiff	30.5	30.7	19.5	23.8	26.1	45.6	5.4	5.2	186.9
Merthyr Tydfil	0.0	0.0	0.1	0.0	5.2	0.0	5.7	0.1	11.1
Neath	0.0	0.0	0.0	0.0	0.0	0.0	0.8	1.2	2.0
Other outside area	3.9	2.8	0.3	1.5	8.3	4.8	1.9	0.4	23.8
Pontypridd	0.0	0.0	1.1	0.3	36.8	1.1	4.3	0.0	43.6
Swansea	4.1	1.4	8.0	1.7	3.8	2.1	3.8	6.8	31.8
<b>Total</b>	<b>175.2</b>	<b>119.2</b>	<b>85.8</b>	<b>120.2</b>	<b>198.1</b>	<b>142.4</b>	<b>52.2</b>	<b>56.2</b>	<b>949.5</b>

## Notes:

Per capita expenditure by zone derived from Experian Retail Planner MMG3 2018

Growth rates and SFT deductions derived from Experian Retail Planner Briefing Note 16 (2018)

Total expenditure is a product of total expenditure (Table 3) and market shares (Table 6)

Prices 2017

**Table 8: Spending patterns summary 2018**

<b>Convenience</b>	<b>£m</b>	<b>%</b>
Turnover retained in BCBC zones	251.5	82%
Turnover derived from elsewhere in study area	54.5	18%
Leakage from BCBC zones	43.5	15%

<b>Comparison</b>	<b>£m</b>	<b>%</b>
Turnover retained in BCBC zones	329.4	78%
Turnover derived from elsewhere in study area	92.9	22%
Leakage from BCBC zones	171.1	34%

Notes:

Convenience spending patterns derived from Table 5

Comparison spending patterns derived from Table 7

**Table 9: Commitments**

Zone	LPA reference	Location	A1 retail		Convenience		Comparison		
			Sqm gross	Sqm net	Sqm gross	Sqm net	Sqm gross	Sqm net	
1	P/16/911/FUL	Dunelm, Parc Plaza, Waterton	572	-	-	400.4	572	400.4	2.4
2	P/17/816/FUL	Pyle Garden Centre, Heol Mostyn	135	-	-	94.5	135	94.5	0.6
4	P/17/610/FUL	Lidl, Ffordd Antwn Tondu	667	667	667	466.55	-	-	-
<b>Total commitments</b>						<b>4.5</b>			<b>3.0</b>

**Notes:**

Extant planning permissions are those permissions for additional retail floorspace which have either yet to be completed or yet to open

Gross and net floorspace data has been provided by Bridgend Council

Net floorspace area has been estimated by PBA where exact figures are not available

Sales densities sourced from Mintel 2017 UK Retail Rankings for named food stores

Standard densities of £6,000 per sqm and £9,500 per sqm adopted for other comparison and convenience

All turnovers for 2018

**Table 10: Convenience need**

Available expenditure		2018	2023	2028	2033
A	Total expenditure (£M)	295	301	304	307
B	Market share of study area (%)	85%	85%	85%	85%
C	Retained expenditure (£M)	252	257	260	262
D	Inflow expenditure (£M)	55	55	56	56
E	Total available expenditure (£M)	306	312	315	318
Claims on expenditure					
F	Turnover of existing floorspace (£M)	306	306	306	306
G	Turnover of commitments (£M)		4.5	4.5	4.5
Quantitative need					
H	Expenditure capacity (£M)	0.0	1.5	5.0	7.7
I	Assumed sales density (£ per sqm net)	9,500	9,500	9,500	9,500
J	Net quantitative need (sqm)		159	523	811
K	Gross quantitative need (sqm)		228	748	1,159

**Notes:**

(1) Row A is the total turnover of BCBC zones (1-4) taken from Table 2. Row B is the market share of BCBC zones (1-4) taken from Table 4 and maintained constant from 2018 onwards. Row C is the product of the market share and total expenditure. Row D is the amount of inflow expenditure derived from other zones in the study area (5-8) taken from Table 5.

(2) Row E is the total turnover of BCBC incorporating both expenditure from the study area and inflow. Row F is the growth in turnover which is forecast at 0.0%.

(3) Row G represents the turnover of commitments to new floorspace in BCBC taken from Table 8. The sales density growth rate described in note (2) is applied from 2018 onwards.

(5) Row H is total expenditure (row E) with a deduction applied for the existing turnover of BCBC and commitments.

(6) Row I is the assumed sales density used to calculate a floorspace requirement. This is the average sales density for all national multiple convenience retailers taken from Mintel 2017 UK Retail Rankings. The sales density growth rate described in note (2) is applied from 2018 onwards.

(7) Row J is calculated by dividing the residual expenditure (row H) by assumed sales density (row I). Row L is calculated by applying a 70% net to gross ratio to the net floorspace requirement (Row J).

2017 prices.

**Table 11: Comparison need**

Available expenditure		2018	2023	2028	2033
A	Total expenditure (£M)	500	557	651	762
B	Market share of study area (%)	66%	66%	66%	66%
C	Retained expenditure (£M)	329	366	429	502
D	Inflow expenditure (£M)	93	103	120	141
E	Total available expenditure (£M)	422	469	549	642
Claims on expenditure					
F	Turnover of existing floorspace (£M)	422	464	510	560
G	Turnover of commitments (£M)		3.0	3.3	3.6
Quantitative need					
H	Expenditure capacity (£M)	0.0	2.3	35.9	78.7
I	Assumed sales density (£ per sqm net)	6,000	6,592	7,243	7,957
J	Net quantitative need (sqm)		348	4,957	9,895
K	Gross quantitative need (sqm)		497	7,081	14,135

**Notes:**

(1) Row A is the total turnover of BCBC zones (1-4) taken from Table 3. Row B is the market share of BCBC zones (1-4) taken from Table 5 and maintained constant from 2018 onwards. Row C is the product of the market share and total expenditure. Row D is the amount of inflow expenditure derived from other zones in the study area (5-8) taken from Table 7.

(2) Row E is the total turnover of BCBC incorporating both expenditure from the study area and inflow. Row F is the growth in turnover which is forecast at a rate of 1.9%.

(3) Row G represents the turnover of commitments to new floorspace in BCBC taken from Table 8. The sales density growth rate described in note (2) is applied from 2018 onwards.

(5) Row H is total expenditure (row E) with a deduction applied for the existing turnover of BCBC and commitments.

(6) Row I is the assumed sales density used to calculate a floorspace requirement. This is a PBA estimate. The sales density growth rate described in note (2) is applied from 2018 onwards.

(7) Row J is calculated by dividing the residual expenditure (row H) by assumed sales density (row I). Row L is calculated by applying a 70% net to gross ratio to the net floorspace requirement (Row J).  
2017 prices.

# Appendix D Retail study technical inputs

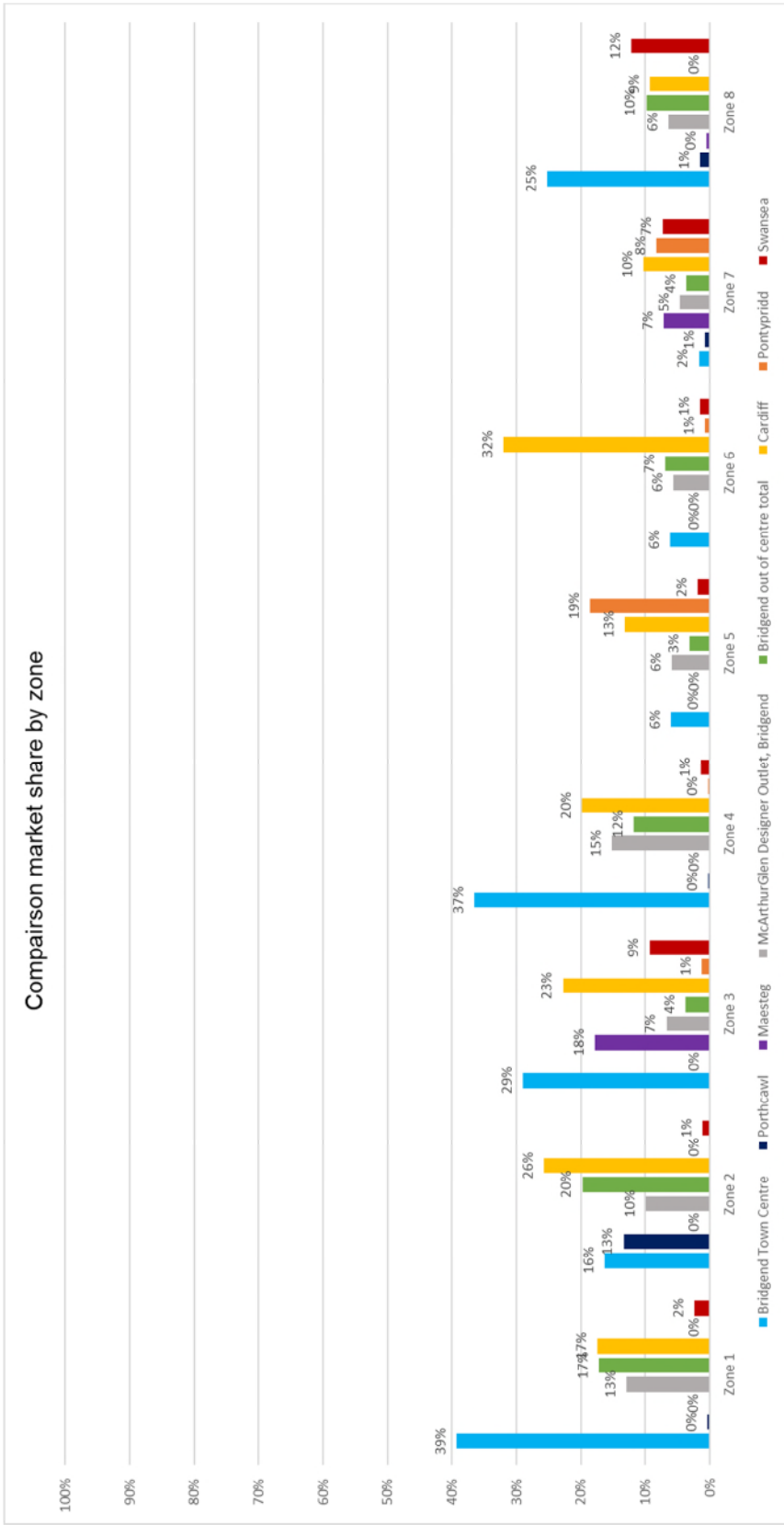
## Appendix: Technical inputs into capacity forecasts

Data	Source	How we have used the data																		
Base Population	Experian	Experian's MMG3 software provides 2017-based population forecasts at postcode sector level. The postcode sector populations are grouped together to form study zones 1-8 used for the purpose of our analysis.																		
Population Projections	Experian	Experian's MMG3 software provides annual population projections over the study period.																		
Base Per Capita Expenditure	Experian	Experian's MMG3 software provides per capita annual expenditure in each zone of the study area on convenience (food), comparison (non-food) and commercial leisure.																		
Retail and leisure expenditure growth forecasts	Experian	<p>Expenditure growth rates from Experian Retail Planner Briefing Note published in December 2018 ('ERPBN16') (Appendix 3), as follows:</p> <table border="1"> <thead> <tr> <th></th> <th>Comparison goods</th> <th>Convenience goods</th> </tr> </thead> <tbody> <tr> <td>2018</td> <td>1.1%</td> <td>0.7%</td> </tr> <tr> <td>2019</td> <td>1.5%</td> <td>0.1%</td> </tr> <tr> <td>2020</td> <td>1.8%</td> <td>-0.1%</td> </tr> <tr> <td>2021-25*</td> <td>2.8%</td> <td>0.0%</td> </tr> <tr> <td>2026-33*</td> <td>3.1%</td> <td>0.0%</td> </tr> </tbody> </table> <p>*per annum growth rates</p>		Comparison goods	Convenience goods	2018	1.1%	0.7%	2019	1.5%	0.1%	2020	1.8%	-0.1%	2021-25*	2.8%	0.0%	2026-33*	3.1%	0.0%
	Comparison goods	Convenience goods																		
2018	1.1%	0.7%																		
2019	1.5%	0.1%																		
2020	1.8%	-0.1%																		
2021-25*	2.8%	0.0%																		
2026-33*	3.1%	0.0%																		
Base Year Special Forms of Trading (SFT)	Experian / Household survey	<p>Special Forms of Trading ('SFT') refers to the amount of money <u>not</u> spent in bricks and mortar retail floorspace and includes online shopping, telesales and temporary markets etc. ERPBN16 (Figure 5, Appendix 3) advises the following SFT discounts at the base year of the study:</p> <ul style="list-style-type: none"> <li>- Comparison goods (2018): 17%</li> <li>- Convenience goods (2018): 3.7%</li> </ul> <p>PBA use the 'adjusted' Experian SFT figures which make an allowance for store-picked online shopping transactions.</p>																		
Growth in SFT	Experian	<p>ERPBN16 (Figure 5, Appendix 3) advises the following SFT discounts at the study forecast years:</p> <table border="1"> <thead> <tr> <th></th> <th>Comparison goods</th> <th>Convenience goods</th> </tr> </thead> <tbody> <tr> <td>2023</td> <td>20.1%</td> <td>4.8%</td> </tr> <tr> <td>2028</td> <td>21.3%</td> <td>5.3%</td> </tr> <tr> <td>2033</td> <td>21.6%</td> <td>5.7%</td> </tr> </tbody> </table> <p>PBA use the 'adjusted' Experian SFT figures which make an allowance for store-picked online shopping transactions.</p>		Comparison goods	Convenience goods	2023	20.1%	4.8%	2028	21.3%	5.3%	2033	21.6%	5.7%						
	Comparison goods	Convenience goods																		
2023	20.1%	4.8%																		
2028	21.3%	5.3%																		
2033	21.6%	5.7%																		
Sales density growth	Experian / PBA	<p>Sales density growth (or floorspace efficiency growth) refers to the ability of retailers to achieve increases in their turnover year on year above inflation which is linked to expenditure growth rates (set out above). PBA applies the following sales density growth rates over the study period:</p> <ul style="list-style-type: none"> <li>- Comparison goods: 1.9% per annum</li> <li>- Convenience goods: 0.0% per annum</li> </ul>																		

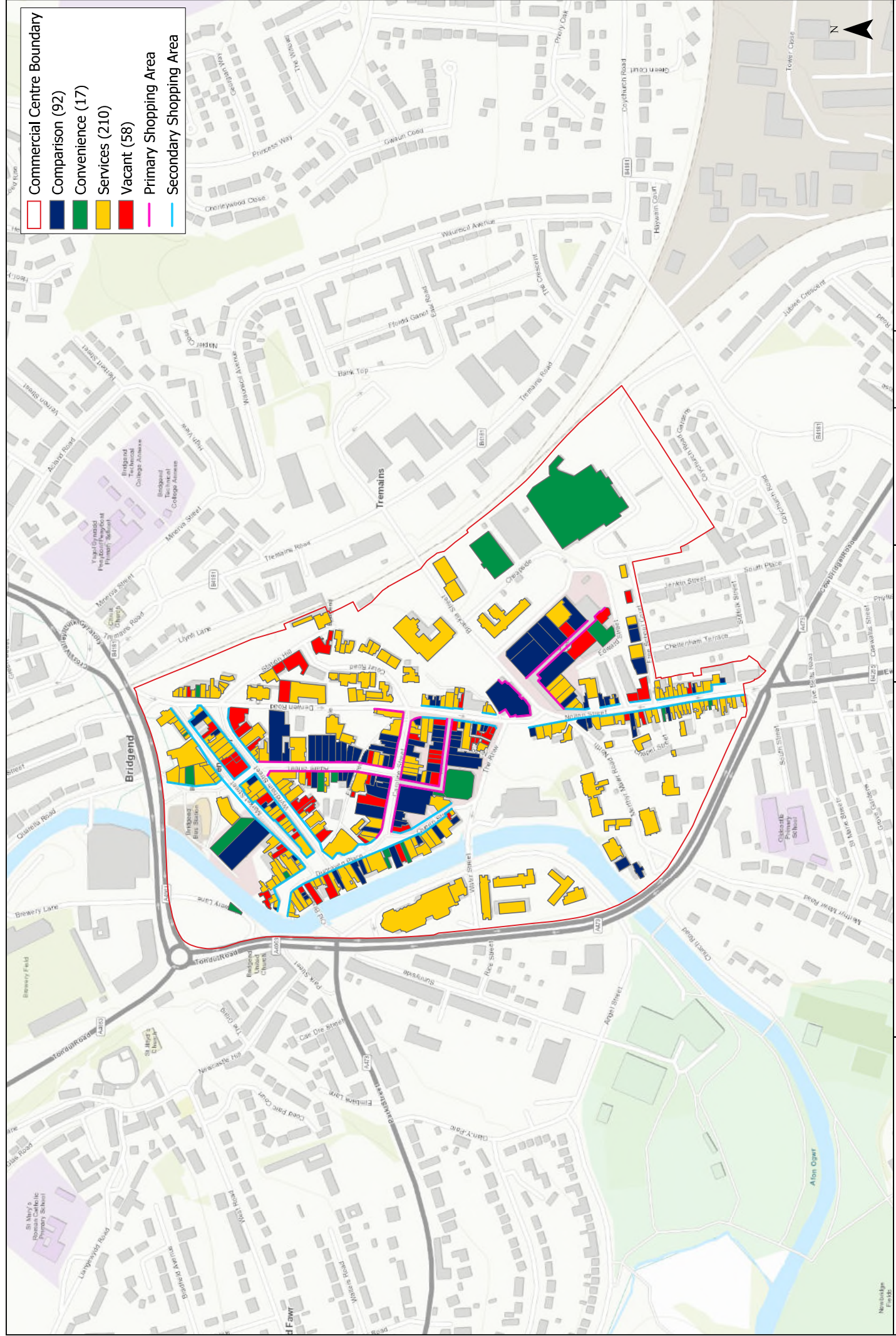




# Appendix E Comparison spending patterns graph



## Appendix F Primary and secondary frontages maps



- Commercial Centre Boundary
- Comparison (92)
- Convenience (17)
- Services (210)
- Vacant (58)
- Primary Shopping Area
- Secondary Shopping Area

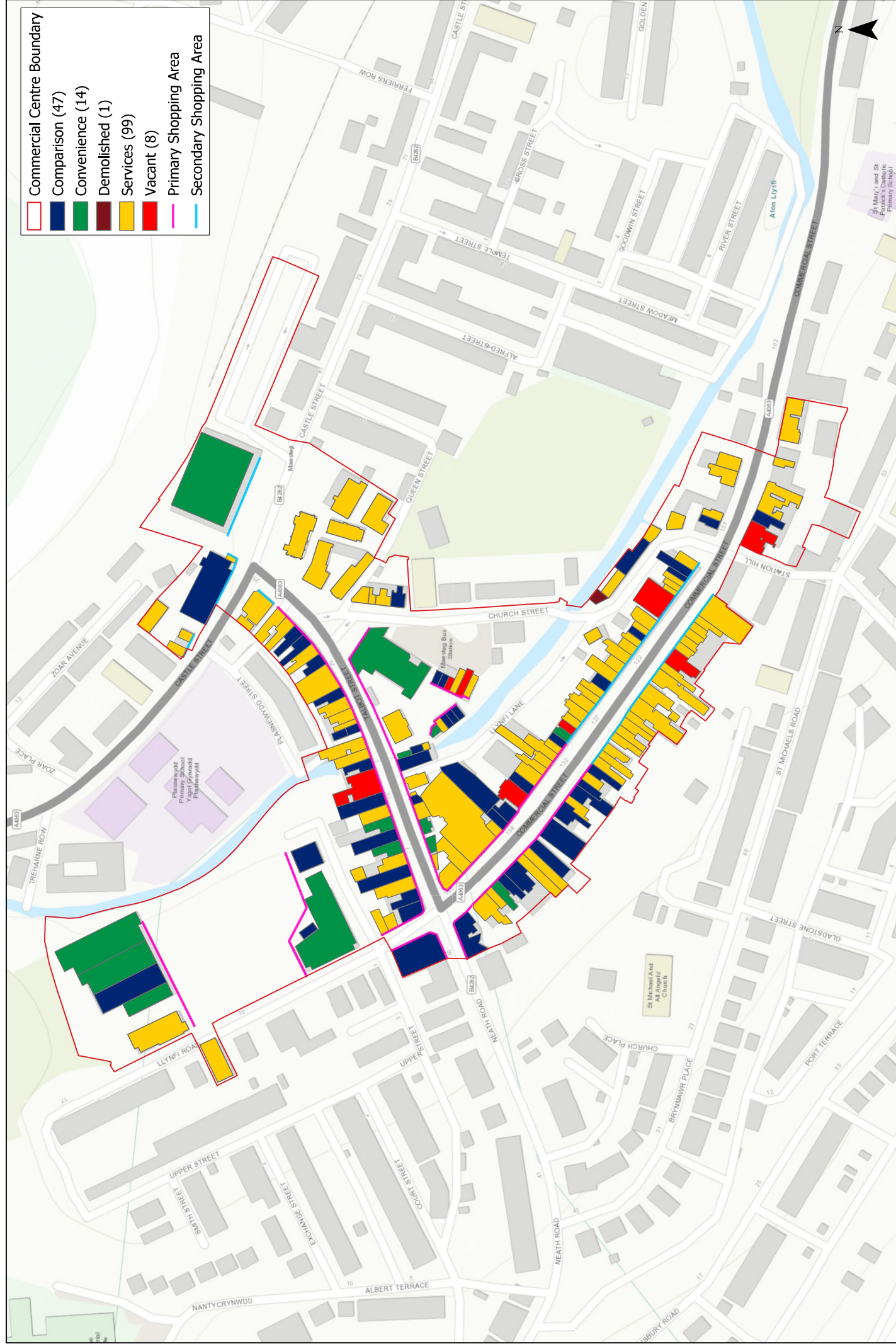
<b>Bridgend LDP Evidence Base Studies</b>	<b>Sub Regional Centre - Bridgend</b>	Client	1:4,000 @ A3 03/04/19 Drawn: IB Checked: EM
<p>0 50 100 m</p> <p>Scale: 1:4,000</p> <p>© Crown Copyright and database right (2019) © GeoInfo (2018) © Experis (2018) All rights reserved. Reproduced under the Open Government License v.0. Commercial Centre Data provided by Bridgend County Borough Council</p>	 <p>Strantec now part of GeoInfo</p>	 <p>Bridgend Council</p>	<p>Figure 1</p> <p>Rev B</p>





- Commercial Centre Boundary
- Comparison (58)
- Convenience (18)
- Services (117)
- Vacant (12)
- Primary Shopping Area
- Secondary Shopping Area

<p><b>Bridgend LDP Evidence Base Studies</b></p> <p><small>© Crown Copyright and database right (2018) © Ordnance Survey (2018) © Experian (2018) All other data provided under the Open Government License v.0. Commercial Centre Data provided by Bridgend Council</small></p>	<p>0 50 100 m</p>	<p>Client</p>	<p>1:3,000 @ A3 03/04/19 Drawn: IB Checked: EM</p>	<p>Town Centre - Porthcawl (for printing) at 1:12,000 scale only</p> <p>Figure 1 Rev B</p>
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- Commercial Centre Boundary
- Comparison (47)
- Convenience (14)
- Demolished (1)
- Services (99)
- Vacant (8)
- Primary Shopping Area
- Secondary Shopping Area

<p><b>Bridgend LDP Evidence Base Studies</b></p> <p>0 50 100 m  <small>BRIGEND Evidence Survey data © Crown copyright and database right (2019) © GeoInfo (2018) © Experian (2018) and Ordnance Survey. All rights reserved. Commercial Centre Data provided by Bridgend County Borough Council</small></p>	<p>Client</p> <p>          Bridgend Council</p>	<p>1:2,000 @ A3</p> <p>15/05/19</p> <p>Drawn: IB</p> <p>Checked: EM</p>	<p>Town Centre - Maesteg</p> <p>Figure 1</p> <p>Rev B</p>
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## Appendix 21a



now part of



# Bridgend LDP Review

Retail Study 2018

Volume 2 - Household survey results

On behalf of **Bridgend County Borough Council**



Project Ref: 45365/RS/001 | Rev: A | Date: May 2019

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## Document Control Sheet

**Project Name:** Bridgend LDP Evidence Base Studies (Retail Study)

**Project Ref:** 45365

**Report Title:** Retail Study 2018

**Doc Ref:** 45365/RS/001

**Date:** May 2019

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<b>Approved by:</b>	Cathy Hall	Director	CH	24.05.2019
<b>For and on behalf of Peter Brett Associates LLP</b>				

Revision	Date	Description	Prepared	Reviewed	Approved
A	02.04.2019	Draft report for client comment	ED/FR	FR/DS	CH
B	24.05.2019	Final report	ED/FR	FR/DS	CH

This report has been prepared by Peter Brett Associates LLP ('PBA') on behalf of its client to whom this report is addressed ('Client') in connection with the project described in this report and takes into account the Client's particular instructions and requirements. This report was prepared in accordance with the professional services appointment under which PBA was appointed by its Client. This report is not intended for and should not be relied on by any third party (i.e. parties other than the Client). PBA accepts no duty or responsibility (including in negligence) to any party other than the Client and disclaims all liability of any nature whatsoever to any such party in respect of this report.

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# 1 Bridgend LDP Review Retail Study 2018



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**Bridgend Borough  
Retail Study  
for  
Peter Brett Associates**

February 2019

Job Ref: 150119

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# Introduction

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## 1.1 Research Background & Objectives

To conduct a survey amongst residents in the Bridgend area to assess shopping habits for main food and grocery, top-up food, non-food shopping and leisure activities.

## 1.2 Research Methodology

A total of 800 telephone interviews were conducted between Monday 21st January 2019 and Tuesday 5th February 2019. Interviews were conducted using NEMS in-house CATI (Computer Assisted Telephone Interviewing) Unit. Respondents were contacted during the day and in the evening. All respondents were the main shopper in the household, determined using a preliminary filter question.

## 1.3 Sampling

### 1.3.1 Survey Area

The survey area was segmented into 8 zones, defined using postcode sectors. The zone details were:

Zone	Postcode Sectors	Number of Interviews
1	CF31 1, CF31 3, CF31 4, CF31 5	100
2	CF32 0, CF33 4, CF36 3, CF36 5	100
3	CF32 8, CF34 9, CF34 0	100
4	CF32 7, CF32 9, CF35 6	100
5	CF35 5, CF71 7, CF72 8, CF72 9	100
6	CF39 8, CF40 1, CF40 2, CF41 7	100
7	CF42 5, CF42 6, SA13 3	100
8	CF33 6, SA13 2	100
<b>Total</b>		<b>800</b>

### **1.3.2 Telephone Numbers**

All available telephone numbers are used to obtain the sample of interviews. This includes published telephone numbers (land-lines and some mobile numbers) and ex-directory numbers as the demographic profile of this sub-set is different to the demographics of the published numbers. All numbers are randomly generated using the area code as a 'seed'. Business numbers are de-duped and excluded.

We don't screen against the TPS (Telephone Preference Service) database, again because the demographic profile of TPS registered numbers is slightly different to the rest of the population. In addition, there is no legal requirement to screen against TPS registered numbers; market research is not classified as unsolicited sales and marketing.

### **1.3.3 Sample Profile**

It should be noted that as per the survey's requirements, the profile of respondents is that of the main shopper / person responsible for most of the food shopping in the household. As such it will always differ from the demographic profile of all adults within the survey area. With any survey among the main shopper / person responsible for most of the food shopping in the household the profile is typically biased more towards females and older people. The age of the main shopper / person responsible for most of the food shopping in the household is becoming older due to the financial constraints on young people setting up home.

A number of measures are put in place to ensure the sample is representative of the profile of the person responsible for most of the food / shopping in the household.

First of all, interviewing is normally spread over a relatively long period of time, certainly longer than the theoretical minimum time it would take. This allows us time to call back people who weren't in when we made the first phone call. If we only interview people who are at home the first time we call, we over-represent people who stay at home the most; these people tend to be older / less economically active.

We also control the age profile of respondents; this is a two-stage process. First of all, we look at the age profile of the survey area according to the latest Census figures. Using a by-product from additional data we collect from a weekly telephone survey of a representative sample of all adults across the country we know the age profile of the main-shopper in any given area. This information is from data based on in excess of 100,000 interviews and is regularly

updated and is therefore probably the most accurate and up to date information of its kind.

Stratified random sampling helps ensure that the sample is as representative as possible. While the system dials the next random selected number for interviewers, all calls are made by interviewers; no automated call handling systems are used.

### 1.3.4 Time of Interviewing

Approximately two-thirds of all calls are made outside normal working hours.

### 1.3.5 Monitoring of Calls

At least 5% of telephone interviews are randomly and remotely monitored by Team Leaders to ensure the interviewing is conducted to the requisite standard. Both the dialogue and on-screen entries are monitored and evaluated. Interviewers are offered re-training should these standards not be met.

## 1.4 Weightings

To correct the small differences between the sample profile and population profile, the data was weighted. The population is of the main shopper in the household. Weightings have been applied to age bands based on an estimated age profile of main shoppers (see section 1.3.3 for details). The weighted totals differ occasionally from the adjusted population due to rounding error. Details of the age weightings are given in the table below:

Age	Main Shopper Profile (%)	Interviews Achieved	Age Weightings
18-34	20.2%	34	4.7624
35-44	17.8%	68	2.0897
45-54	18.4%	213	0.6902
55-64	18.5%	146	1.0154
65+	25.1%	339	0.5922
(Refused)	n/a	0	1.0000
<b>Total</b>		<b>800</b>	



Further weightings were then applied to adjust zone samples to be representative by population. Details of those weightings are given in the table below:

Zone	Population *	Interviews Achieved	Interviews Achieved (Weighted by Age)	Zone Weightings
1	36,248	100	104	1.3664
2	23,484	100	96	0.9634
3	22,920	100	104	0.8602
4	22,904	100	98	0.9117
5	32,701	100	97	1.3262
6	37,697	100	94	1.5684
7	15,316	100	88	0.6811
8	12,921	100	119	0.4259
<b>Total</b>	<b>204,191</b>	<b>800</b>		

\* Source: Census 2011

## 1.5 Statistical Accuracy

As with any data collection where a sample is being drawn to represent a population, there is potentially a difference between the response from the sample and the true situation in the population as a whole. Many steps have been taken to help minimise this difference (e.g. random sample selection, questionnaire construction etc) but there is always potentially a difference between the sample and population – this is known as the standard error.

The standard error can be estimated using statistical calculations based on the sample size, the population size and the level of response measured (as you would expect you can potentially get a larger error in a 50% response than say a 10% response simply because of the magnitude of the numbers).

To help understand the significance of this error, it is normally expressed as a confidence interval for the results. Clearly to have 100% accuracy of the results would require you to sample the entire population. The usual confidence interval used is 95% - this means that you can be confident that in 19 out of 20 instances the actual population behaviour will be within the confidence interval range.

*For example, if 50% of a sample of 800 answers “Yes” to a question, we can be 95% sure that between 46.5% and 53.5% of the population holds the same opinion (i.e. +/- 3.5%).* The following is a guide showing confidence intervals attached to various sample sizes from the study:

<b>%ge Response</b>	<b>95% confidence interval</b>
10%	±2.1%
20%	±2.8%
30%	±3.2%
40%	±3.4%
50%	±3.5%

## 1.6 Data Tables

Tables are presented in question order with the question number analysed shown at the top of the table. Those questions where the respondent is prompted with a list of possible answers are indicated in the question text with a suffix of [PR].

The sample size for each question and corresponding column criteria is shown at the base of each table. A description of the criteria determining to whom the question applies is shown in italics directly below the question text; if there is no such text evident then the question base is the full study sample. If the tabulated data is weighted (indicated in the header of the tabulations), in addition to the sample base, the weighted base is also shown at the bottom of each table.

Unless indicated otherwise in the footer of the tabulations, all percentages are calculated down the column. Arithmetic rounding to whole numbers may mean that columns of percentages do not sum to exactly 100%. Zero per cent denotes a percentage of less than 0.05%.

Percentages are calculated on the number of respondents and not the number of responses. This means that where more than one answer can be given to a question the sum of percentages may exceed 100%. All such multi-response questions are indicated in the tabulated by a suffix of [MR] on the question text.

Where appropriate to the question, means are shown at the bottom of response tables. These are calculated in one of two ways: if the data is captured to a coded response a weighted mean is calculated and the code weightings are shown as a prefix above the question text; if actual specific values were captured from respondents these individual numbers are used to calculate the mean.

## **Appendix 1:**

Data Tabulations

By Zone

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q01 Where did your household last undertake a main food and grocery purchase?</b>																		
Aldi, Brackla Street, Bridgend	3.5%	28	7.0%	7	2.0%	2	1.0%	1	7.0%	7	6.0%	6	0.0%	0	0.0%	0	5.0%	5
Aldi, Glamorgan Vale Retail Park, Llantrisant	1.5%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	8	2.0%	2	0.0%	0	2.0%	2
Aldi, Llynfi Road, Maesteg	3.4%	27	0.0%	0	0.0%	0	22.0%	22	1.0%	1	0.0%	0	0.0%	0	4.0%	4	0.0%	0
Asda, Castle Street, Maesteg	1.3%	10	0.0%	0	0.0%	0	9.0%	9	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Asda, Colliers Way, Tonypany	8.3%	66	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	42.0%	42	23.0%	23	0.0%	0
Asda, Coychurch Road, Bridgend	5.4%	43	17.0%	17	6.0%	6	2.0%	2	15.0%	15	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	5.6%	45	0.0%	0	16.0%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	29.0%	29
Co-op, 3-7 Cowbridge Road, Brynsadler, Pontyclun	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, 57 High Street, Cowbridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, 6 Southgate Avenue, Llantrisant, Pontyclun	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, 75 Tylacelyn Road, Penygraig, Tonypany	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Co-op, Lias Road, Porthcawl	1.6%	13	0.0%	0	13.0%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, New Road, Porthcawl	0.4%	3	0.0%	0	2.0%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Penybont Road, Pencoed, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Station Road, Treorchy	1.4%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	9.0%	9	0.0%	0
Co-op, The Triangle, Canolfan, Brackla	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Brackla Street Shopping Centre, Bridgend	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Iceland, Dunraven Street, Tonypany	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Iceland, High Street, Treorchy	1.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	8.0%	8	0.0%	0
Iceland, Llynfi Road, Maesteg	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Bridgend Retail Park, Bridgend	3.8%	30	6.0%	6	7.0%	7	3.0%	3	6.0%	6	5.0%	5	1.0%	1	0.0%	0	2.0%	2
Lidl, Broadview, Tondu, Bridgend	2.6%	21	2.0%	2	0.0%	0	3.0%	3	14.0%	14	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Lidl, High Street, Treorchy	3.4%	27	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	9.0%	9	16.0%	16	1.0%	1
Marks & Spencer, Talbot Green Retail Park, Pontyclun	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	5.4%	43	8.0%	8	8.0%	8	6.0%	6	12.0%	12	1.0%	1	1.0%	1	0.0%	0	7.0%	7
Tesco Express, Cowbridge Road, Pontyclun	0.9%	7	3.0%	3	0.0%	0	1.0%	1	1.0%	1	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Tesco Express, Coychurch Road, Pencoed, Bridgend	0.6%	5	0.0%	0	0.0%	0	0.0%	0	3.0%	3	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Express, High Street, Cowbridge	0.4%	3	1.0%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	9.5%	76	23.0%	23	23.0%	23	3.0%	3	15.0%	15	7.0%	7	0.0%	0	0.0%	0	5.0%	5
Tesco Extra, Green Park, Talbot Green, Pontyclun	6.8%	54	0.0%	0	1.0%	1	0.0%	0	1.0%	1	37.0%	37	9.0%	9	5.0%	5	1.0%	1
Tesco, Brewery Lane, Bridgend	5.8%	46	24.0%	24	6.0%	6	5.0%	5	9.0%	9	0.0%	0	1.0%	1	0.0%	0	1.0%	1
Tesco, Castle Street, Maesteg	6.0%	48	0.0%	0	0.0%	0	35.0%	35	1.0%	1	0.0%	0	0.0%	0	10.0%	10	2.0%	2
Waitrose, Birds Lane, Cowbridge	1.5%	12	2.0%	2	3.0%	3	0.0%	0	0.0%	0	7.0%	7	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caerphilly	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Cardiff Bay	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Llantrisant	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merthyr Tydfil	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	2.0%	2	0.0%	0
Pontyclun	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
Pontypridd	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Port Talbot	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Porthcawl	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea	0.3%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Talbot Green Shopping Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tonypandy	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Aldi, Commercial Road, Port Talbot	3.1%	25	0.0%	0	4.0%	4	0.0%	0	0.0%	0	4.0%	4	3.0%	3	2.0%	2	12.0%	12
Tesco, Prior Street, Port Talbot	2.1%	17	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	4.0%	4	11.0%	11
Lidl, Baglan Way Retail Park, Afan Way, Port Talbot,	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.0%	3
Morrisons, Baglan Industrial Park, Christchurch Road, Port Talbot	1.0%	8	2.0%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	2.0%	2	2.0%	2
Aldi, Cymmer Road, Porth, CF39 9BQ	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	2.0%	2	0.0%	0
Cardiff - out of centre	1.5%	12	0.0%	0	2.0%	2	1.0%	1	0.0%	0	6.0%	6	2.0%	2	1.0%	1	0.0%	0
Lidl, Cymmer Road, Porth, CF39 9BL	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0
Morrisons, Pontypridd Road, Porth, CF39 9PH	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	1.0%	1	0.0%	0
Spar, Bute Street, Treherbert, Treorchy, CF42 5NR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Other, zone 4	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 8	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Other, outside area	1.1%	9	0.0%	0	1.0%	1	1.0%	1	0.0%	0	2.0%	2	5.0%	5	0.0%	0	0.0%	0
Internet / delivered	4.1%	33	0.0%	0	4.0%	4	2.0%	2	7.0%	7	5.0%	5	2.0%	2	5.0%	5	8.0%	8
(Don't know / can't remember)	1.0%	8	3.0%	3	1.0%	1	1.0%	1	1.0%	1	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Base:	800	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q02 And where did you shop the time before that (was it the same, or different, and if so, please specify)?</b>																		
<i>Not 'Don't do' or 'Don't know' at Q01</i>																		
Aldi, Brackla Street, Bridgend	3.0%	24	7.2%	7	3.0%	3	1.0%	1	4.0%	4	4.0%	4	1.0%	1	0.0%	0	4.0%	4
Aldi, Glamorgan Vale Retail Park, Llantrisant	1.4%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	3.0%	3	0.0%	0	2.0%	2
Aldi, Llynfi Road, Maesteg	2.8%	22	0.0%	0	0.0%	0	17.2%	17	1.0%	1	0.0%	0	0.0%	0	3.0%	3	1.0%	1
Asda, Castle Street, Maesteg	1.8%	14	0.0%	0	0.0%	0	12.1%	12	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0
Asda, Colliers Way, Tonypany	5.8%	46	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	28.0%	28	17.2%	17	0.0%	0
Asda, Coychurch Road, Bridgend	8.3%	66	22.7%	22	7.1%	7	4.0%	4	27.3%	27	2.0%	2	1.0%	1	0.0%	0	3.0%	3
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	4.9%	39	1.0%	1	16.2%	16	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	21.2%	21
Co-op, 6 Southgate Avenue, Llantrisant, Pontyclun	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, 75 Tylacelyn Road, Penygraig, Tonypany	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Co-op, Bridgend Road, Bryncae, Pontyclun	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Lias Road, Porthcawl	1.4%	11	0.0%	0	10.1%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Co-op, New Road, Porthcawl	0.6%	5	0.0%	0	4.0%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Penrhwiwer Road, Tonyrefail, Porth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Co-op, Penybont Road, Pencoed, Bridgend	0.6%	5	1.0%	1	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Station Road, Treorchy	1.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	9.1%	9	0.0%	0
Co-op, The Triangle, Canolfan, Brackla	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Bracklea Street Shopping Centre, Bridgend	0.3%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Iceland, Dunraven Street, Tonypany	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0
Iceland, High Street, Treorchy	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	6.1%	6	0.0%	0
Iceland, Llynfi Road, Maesteg	1.0%	8	0.0%	0	0.0%	0	7.1%	7	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Lidl, Bridgend Retail Park, Bridgend	5.2%	41	15.5%	15	11.1%	11	3.0%	3	2.0%	2	7.0%	7	0.0%	0	0.0%	0	3.0%	3
Lidl, Broadview, Tondy, Bridgend	3.2%	25	1.0%	1	1.0%	1	5.1%	5	11.1%	11	1.0%	1	1.0%	1	0.0%	0	5.1%	5
Lidl, High Street, Treorchy	4.3%	34	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.0%	13	20.2%	20	1.0%	1
Marks & Spencer, Talbot Green Retail Park, Pontyclun	0.5%	4	0.0%	0	0.0%	0	1.0%	1	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	6.2%	49	11.3%	11	9.1%	9	2.0%	2	12.1%	12	3.0%	3	0.0%	0	0.0%	0	12.1%	12
Tesco Express, Cowbridge Road, Pontyclun	0.4%	3	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Coychurch Road, Pencoed, Bridgend	1.0%	8	1.0%	1	0.0%	0	1.0%	1	4.0%	4	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Express, District Centre Broadlands, Bridgend	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, High Street, Cowbridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	7.8%	62	14.4%	14	17.2%	17	6.1%	6	13.1%	13	6.0%	6	0.0%	0	0.0%	0	6.1%	6
Tesco Extra, Green Park, Talbot Green, Pontyclun	5.2%	41	0.0%	0	0.0%	0	0.0%	0	2.0%	2	28.0%	28	7.0%	7	3.0%	3	1.0%	1
Tesco, Brewery Lane, Bridgend	3.4%	27	13.4%	13	3.0%	3	3.0%	3	6.1%	6	0.0%	0	1.0%	1	0.0%	0	1.0%	1
Tesco, Castle Street, Maesteg	5.1%	40	0.0%	0	0.0%	0	28.3%	28	1.0%	1	0.0%	0	0.0%	0	10.1%	10	1.0%	1
Waitrose, Birds Lane, Cowbridge	1.5%	12	3.1%	3	2.0%	2	0.0%	0	0.0%	0	7.0%	7	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	0.3%	2	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caerphilly	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0



## Bridgend Borough Retail Study for Peter Brett Associates

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
Cardiff City Centre	0.4%	3	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowbridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Llantrisant	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maesteg	0.3%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	1
Merthyr Tydfil	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0
Pontyclun	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Pontypridd	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0
Port Talbot	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Porthcawl	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea	0.4%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Talbot Green Shopping Centre	0.4%	3	0.0%	0	0.0%	0	1.0%	1	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Talbot Green Town Centre	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tonypanydy	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Aldi, Commercial Road, Port Talbot	3.2%	25	0.0%	0	3.0%	3	0.0%	0	0.0%	0	8.0%	8	2.0%	2	3.0%	3	9.1%	9
Tesco, Prior Street, Port Talbot	1.5%	12	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	5.1%	5	6.1%	6
Picton Court Retail Park, Waterton, Bridgend	0.5%	4	2.1%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Lidl, Baglan Way Retail Park, Afan Way, Port Talbot,	0.5%	4	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	2.0%	2
Morrisons, Baglan Industrial Park, Christchurch Road, Port Talbot	1.6%	13	2.1%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1	3.0%	3	5.1%	5
Aldi, Cymmer Road, Porth, CF39 9BQ	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	3.0%	3	0.0%	0
Cardiff - out of centre	1.4%	11	1.0%	1	2.0%	2	0.0%	0	0.0%	0	6.0%	6	0.0%	0	2.0%	2	0.0%	0
Lidl, Cymmer Road, Porth, CF39 9BL	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0
Morrisons, Pontypridd Road, Porth, CF39 9PH	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	2.0%	2	0.0%	0
Spar, Bute Street, Treherbert, Treorchy, CF42 5NR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Other, zone 2	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 8	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Other, outside area	1.5%	12	0.0%	0	1.0%	1	0.0%	0	1.0%	1	3.0%	3	5.0%	5	2.0%	2	0.0%	0
Internet / delivered	3.3%	26	0.0%	0	1.0%	1	1.0%	1	5.1%	5	5.0%	5	4.0%	4	3.0%	3	7.1%	7
(Don't know / can't remember)	0.9%	7	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	3.0%	3
Base:		792		97		99		99		99		100		100		99		99

### Q03 What form of transport do you use to visit your main food shopping destination?

*Not 'Don't do' or 'Don't know' or 'Internet' at Q01*

Car - Driver	74.7%	567	82.5%	80	77.9%	74	75.3%	73	81.5%	75	80.0%	76	69.4%	68	54.3%	51	76.9%	70
Car - Passenger	12.4%	94	7.2%	7	12.6%	12	7.2%	7	12.0%	11	9.5%	9	14.3%	14	27.7%	26	8.8%	8
Bus	6.1%	46	3.1%	3	2.1%	2	8.2%	8	4.3%	4	2.1%	2	10.2%	10	10.6%	10	7.7%	7
Cycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Disabled vehicle (e.g. mobility scooter)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Taxi	1.1%	8	1.0%	1	0.0%	0	3.1%	3	0.0%	0	1.1%	1	2.0%	2	0.0%	0	1.1%	1
Train	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Walk	4.5%	34	5.2%	5	7.4%	7	6.2%	6	1.1%	1	5.3%	5	2.0%	2	4.3%	4	4.4%	4
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.1%	8	1.0%	1	0.0%	0	0.0%	0	1.1%	1	2.1%	2	1.0%	1	2.1%	2	1.1%	1
Base:		759		97		95		97		92		95		98		94		91

# Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q04 When your household undertakes its main food and grocery spend (STORE MENTIONED AT Q01) does it visit other shops, leisure or service outlets on the same shopping trips? And if so which ones? [MR]</b>																		
<i>Not 'Don't do' or 'Don't know' or 'Internet' at Q01</i>																		
Yes - other food shops	11.9%	90	6.2%	6	16.8%	16	15.5%	15	7.6%	7	9.5%	9	12.2%	12	13.8%	13	13.2%	12
Yes - other non food shops (clothing, footwear, electrical etc)	15.7%	119	13.4%	13	18.9%	18	9.3%	9	15.2%	14	24.2%	23	12.2%	12	16.0%	15	16.5%	15
Yes - pubs, restaurants or cafes	4.7%	36	2.1%	2	4.2%	4	7.2%	7	7.6%	7	2.1%	2	6.1%	6	4.3%	4	4.4%	4
Yes - financial service (i.e. bank, building society)	2.2%	17	3.1%	3	3.2%	3	1.0%	1	5.4%	5	1.1%	1	0.0%	0	4.3%	4	0.0%	0
Yes - other service (e.g. hairdresser, travel agent, estate agent)	1.4%	11	1.0%	1	4.2%	4	2.1%	2	0.0%	0	1.1%	1	0.0%	0	2.1%	2	1.1%	1
Yes - leisure activity	3.2%	24	2.1%	2	3.2%	3	2.1%	2	4.3%	4	3.2%	3	5.1%	5	3.2%	3	2.2%	2
Yes - other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(No)	65.6%	498	72.2%	70	55.8%	53	62.9%	61	64.1%	59	68.4%	65	70.4%	69	63.8%	60	67.0%	61
(Don't know / varies)	3.0%	23	5.2%	5	3.2%	3	4.1%	4	3.3%	3	0.0%	0	1.0%	1	4.3%	4	3.3%	3
Base:		759		97		95		97		92		95		98		94		91

**Mean score [£]:****Q05 Approximately how much money does your household spend per week on its main food and groceries shop at (STORE MENTIONED AT Q01)?***Not 'Don't do' or 'Don't know' at Q01*

£1 - 10	0.5%	4	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2
£11 - 20	2.1%	17	4.1%	4	0.0%	0	0.0%	0	1.0%	1	1.0%	1	2.0%	2	5.1%	5	4.0%	4
£21 - 30	6.9%	55	4.1%	4	4.0%	4	9.1%	9	4.0%	4	9.0%	9	6.0%	6	10.1%	10	9.1%	9
£31 - 40	7.8%	62	4.1%	4	11.1%	11	5.1%	5	4.0%	4	6.0%	6	11.0%	11	15.2%	15	6.1%	6
£41 - 50	11.2%	89	8.2%	8	9.1%	9	8.1%	8	12.1%	12	13.0%	13	11.0%	11	19.2%	19	9.1%	9
£51 - 60	11.2%	89	12.4%	12	8.1%	8	9.1%	9	20.2%	20	12.0%	12	8.0%	8	11.1%	11	9.1%	9
£61 - 70	8.5%	67	8.2%	8	8.1%	8	8.1%	8	2.0%	2	12.0%	12	10.0%	10	6.1%	6	13.1%	13
£71 - 80	8.8%	70	12.4%	12	7.1%	7	7.1%	7	9.1%	9	11.0%	11	9.0%	9	4.0%	4	11.1%	11
£81 - 90	4.8%	38	6.2%	6	7.1%	7	4.0%	4	3.0%	3	1.0%	1	4.0%	4	8.1%	8	5.1%	5
£91 - 100	10.4%	82	10.3%	10	15.2%	15	6.1%	6	11.1%	11	14.0%	14	9.0%	9	4.0%	4	13.1%	13
£101 - 150	7.2%	57	7.2%	7	8.1%	8	10.1%	10	11.1%	11	10.0%	10	4.0%	4	5.1%	5	2.0%	2
£151 - 200	1.4%	11	0.0%	0	3.0%	3	2.0%	2	3.0%	3	0.0%	0	1.0%	1	1.0%	1	1.0%	1
£201+	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	17.3%	137	20.6%	20	16.2%	16	30.3%	30	18.2%	18	8.0%	8	23.0%	23	10.1%	10	12.1%	12
(Refused)	1.6%	13	1.0%	1	3.0%	3	1.0%	1	1.0%	1	2.0%	2	2.0%	2	0.0%	0	3.0%	3
Mean:		70.21		70.82		79.38		74.04		77.63		72.42		65.57		57.94		65.50
Base:		792		97		99		99		99		100		100		99		99

**Mean score [Times a week]: Everyday = 7, 5 - 6 times a week = 5.5, 3 - 4 times a week = 3.5, Twice a week = 2, Once a week = 1, Once every two weeks = 0.5, Once a month = 0.25, Less often = 0.1**

**Q06 How often does your household normally visit its main food and grocery shopping destination (STORE MENTIONED AT Q01)?***Not 'Don't do' or 'Don't know' at Q01*

Everyday	1.8%	14	2.1%	2	4.0%	4	3.0%	3	0.0%	0	2.0%	2	1.0%	1	1.0%	1	1.0%	1
5 - 6 times a week	0.9%	7	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	4.0%	4
3 - 4 times a week	3.9%	31	3.1%	3	3.0%	3	8.1%	8	1.0%	1	2.0%	2	3.0%	3	5.1%	5	6.1%	6
Twice a week	8.3%	66	5.2%	5	12.1%	12	9.1%	9	5.1%	5	8.0%	8	8.0%	8	7.1%	7	12.1%	12
Once a week	66.3%	525	76.3%	74	61.6%	61	68.7%	68	66.7%	66	66.0%	66	70.0%	70	63.6%	63	57.6%	57
Once every two weeks	11.1%	88	9.3%	9	12.1%	12	3.0%	3	19.2%	19	13.0%	13	8.0%	8	15.2%	15	9.1%	9
Once a month	3.7%	29	2.1%	2	1.0%	1	4.0%	4	3.0%	3	3.0%	3	6.0%	6	5.1%	5	5.1%	5
Less often	0.4%	3	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1
(Don't know / varies)	3.7%	29	1.0%	1	6.1%	6	2.0%	2	4.0%	4	6.0%	6	3.0%	3	3.0%	3	4.0%	4
Mean:		1.25		1.24		1.40		1.48		0.95		1.17		1.18		1.15		1.44
Base:		792		97		99		99		99		100		100		99		99

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q07 Where did your household last undertake your 'top-up' food and grocery purchases? (i.e smaller/ 'basket' shopping purchases which are not part of your main food and groceries shop)</b>																		
Aldi, Brackla Street, Bridgend	1.0%	8	4.0%	4	1.0%	1	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Glamorgan Vale Retail Park, Llantrisant	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1
Aldi, Llynfi Road, Maesteg	1.0%	8	0.0%	0	0.0%	0	8.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Castle Street, Maesteg	1.4%	11	0.0%	0	0.0%	0	11.0%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Colliers Way, Tonypanydy	3.0%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.0%	20	4.0%	4	0.0%	0
Asda, Coychurch Road, Bridgend	2.1%	17	6.0%	6	1.0%	1	0.0%	0	6.0%	6	1.0%	1	0.0%	0	0.0%	0	3.0%	3
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	3.8%	30	0.0%	0	7.0%	7	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	22.0%	22
Co-op, 278 Tollgate Road, Margam Neath, Port Talbot	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	2.0%	2
Co-op, 3-7 Cowbridge Road, Brynsadler, Pontyclun	1.0%	8	0.0%	0	0.0%	0	2.0%	2	0.0%	0	6.0%	6	0.0%	0	0.0%	0	0.0%	0
Co-op, 57 High Street, Cowbridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, 6 Southgate Avenue, Llantrisant, Pontyclun	0.9%	7	0.0%	0	0.0%	0	2.0%	2	0.0%	0	4.0%	4	1.0%	1	0.0%	0	0.0%	0
Co-op, 75 Tylacelyn Road, Penygraig, Tonypanydy	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0
Co-op, Bridgend Road, Bryncae, Pontyclun	0.4%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Co-op, Cambrian Avenue, Gilfach Goch, Porth	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Co-op, Lias Road, Porthcawl	2.3%	18	0.0%	0	18.0%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, New Road, Porthcawl	2.0%	16	0.0%	0	15.0%	15	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Penrhwiwer Road, Tonyrefail, Porth	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0
Co-op, Penybont Road, Pencoed, Bridgend	2.5%	20	5.0%	5	0.0%	0	1.0%	1	12.0%	12	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Co-op, Station Road, Treorchy	1.5%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	11.0%	11	0.0%	0
Co-op, The Triangle, Canolfan, Brackla	0.8%	6	5.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Co-op, Victoria Street, Pontycymer	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Bracklea Street Shopping Centre, Bridgend	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, High Street, Treorchy	1.4%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	10.0%	10	0.0%	0
Iceland, Llynfi Road, Maesteg	0.4%	3	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Bridgend Retail Park, Bridgend	1.3%	10	2.0%	2	1.0%	1	0.0%	0	4.0%	4	2.0%	2	1.0%	1	0.0%	0	0.0%	0
Lidl, Broadview, Tondy, Bridgend	1.4%	11	0.0%	0	0.0%	0	1.0%	1	10.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, High Street, Treorchy	2.3%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.0%	9	9.0%	9	0.0%	0
Marks & Spencer, Talbot Green Retail Park, Pontyclun	0.5%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.0%	2	0.0%	0	1.0%	1	0.0%	0
Sainsbury's, The Derwen, Bridgend	1.3%	10	3.0%	3	1.0%	1	2.0%	2	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Cowbridge Road, Pontyclun	0.5%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Coychurch Road, Pencoed, Bridgend	0.8%	6	3.0%	3	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, District Centre Broadlands, Bridgend	1.0%	8	8.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, High Street, Cowbridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	3.5%	28	15.0%	15	3.0%	3	3.0%	3	3.0%	3	2.0%	2	0.0%	0	1.0%	1	1.0%	1
Tesco Extra, Green Park,	2.9%	23	0.0%	0	1.0%	1	0.0%	0	0.0%	0	17.0%	17	1.0%	1	2.0%	2	2.0%	2

## Bridgend Borough Retail Study for Peter Brett Associates

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
Talbot Green, Pontyclun																		
Tesco, Brewery Lane, Bridgend	1.8%	14	12.0%	12	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Tesco, Castle Street, Maesteg	2.8%	22	0.0%	0	1.0%	1	17.0%	17	1.0%	1	0.0%	0	0.0%	0	3.0%	3	0.0%	0
Waitrose, Birds Lane, Cowbridge	1.6%	13	0.0%	0	0.0%	0	0.0%	0	1.0%	1	11.0%	11	0.0%	0	0.0%	0	1.0%	1
Bridgend Town Centre	1.5%	12	7.0%	7	1.0%	1	2.0%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff Bay	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	0.3%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Cowbridge	0.4%	3	2.0%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Kenfig Hill	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Lalestan/St Brides	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llantrisant	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Maesteg	2.0%	16	0.0%	0	0.0%	0	13.0%	13	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1
Margam	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Merthyr Tydfil	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Pencoed	0.8%	6	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	1.0%	1	0.0%	0	0.0%	0
Port Talbot	1.0%	8	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	5.0%	5
Porthcawl	2.3%	18	0.0%	0	16.0%	16	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1
Swansea	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Tonypanyd	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0
Treorchy	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0
Aldi, Commercial Road, Port Talbot	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1	1.0%	1	3.0%	3
Tesco, Prior Street, Port Talbot	0.9%	7	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	5.0%	5
Picton Court Retail Park, Waterton, Bridgend	0.6%	5	2.0%	2	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Baglan Way Retail Park, Afan Way, Port Talbot,	0.5%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	1.0%	1
Morrisons, Baglan Industrial Park, Christchurch Road, Port Talbot	0.5%	4	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Aldi, Cymmer Road, Porth, CF39 9BQ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Cardiff - out of centre	0.6%	5	1.0%	1	0.0%	0	0.0%	0	2.0%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Bridgend - out of centre	0.4%	3	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Cymmer Road, Porth, CF39 9BL	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Morrisons, Pontypridd Road, Porth, CF39 9PH	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Spar, Bute Street, Treherbert, Treorchy, CF42 5NR	1.8%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.0%	14	0.0%	0
Other, zone 1	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 2	0.4%	3	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 4	0.9%	7	0.0%	0	0.0%	0	0.0%	0	7.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 5	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	7	0.0%	0	0.0%	0
Other, zone 7	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0
Other, zone 8	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5
Other, outside area	1.0%	8	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	4.0%	4	2.0%	2	0.0%	0
Internet / delivered	0.4%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1
(Don't know / can't remember)	3.5%	28	5.0%	5	5.0%	5	4.0%	4	1.0%	1	1.0%	1	6.0%	6	3.0%	3	3.0%	3
(Don't do this type of shopping)	25.0%	200	17.0%	17	16.0%	16	24.0%	24	31.0%	31	24.0%	24	30.0%	30	22.0%	22	36.0%	36
Base:		800		100		100		100		100		100		100		100		100

Column %ges.

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q08 And where did you go for top-up food shopping the time before that?</b>																		
<i>Not 'Don't do' or 'Don't know' at Q07</i>																		
Aldi, Brackla Street, Bridgend	0.7%	4	1.3%	1	0.0%	0	1.4%	1	2.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Glamorgan Vale Retail Park, Llantrisant	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	1.3%	1	1.6%	1
Aldi, Llynfi Road, Maesteg	1.7%	10	0.0%	0	0.0%	0	13.9%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Castle Street, Maesteg	2.1%	12	0.0%	0	0.0%	0	16.7%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Colliers Way, Tonypany	2.8%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.8%	12	5.3%	4	0.0%	0
Asda, Coychurch Road, Bridgend	4.2%	24	19.2%	15	0.0%	0	0.0%	0	8.8%	6	1.3%	1	0.0%	0	0.0%	0	3.3%	2
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	5.4%	31	0.0%	0	6.3%	5	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	41.0%	25
Co-op, 278 Tollgate Road, Margam Neath, Port Talbot	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	1.3%	1	3.3%	2
Co-op, 3-7 Cowbridge Road, Brynsadler, Pontyclun	1.2%	7	0.0%	0	0.0%	0	2.8%	2	0.0%	0	6.7%	5	0.0%	0	0.0%	0	0.0%	0
Co-op, 57 High Street, Cowbridge	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0
Co-op, 6 Southgate Avenue, Llantrisant, Pontyclun	1.4%	8	0.0%	0	0.0%	0	2.8%	2	0.0%	0	6.7%	5	1.6%	1	0.0%	0	0.0%	0
Co-op, 75 Tylacelyn Road, Penygraig, Tonypany	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	4	0.0%	0	0.0%	0
Co-op, Bridgend Road, Bryncae, Pontyclun	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0
Co-op, Cambrian Avenue, Gilfach Goch, Porth	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	2	0.0%	0	0.0%	0
Co-op, Lias Road, Porthcawl	2.6%	15	0.0%	0	19.0%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, New Road, Porthcawl	2.1%	12	0.0%	0	15.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Penrhwiwer Road, Tonyrefail, Porth	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	4	0.0%	0	0.0%	0
Co-op, Penybont Road, Pencoed, Bridgend	3.0%	17	2.6%	2	0.0%	0	0.0%	0	17.6%	12	2.7%	2	0.0%	0	0.0%	0	1.6%	1
Co-op, Station Road, Treorchy	2.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.3%	13	0.0%	0
Co-op, The Triangle, Canolfan, Brackla	0.5%	3	3.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Victoria Street, Pontycymer	0.2%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Bracklea Street Shopping Centre, Bridgend	0.5%	3	2.6%	2	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, High Street, Treorchy	1.7%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	2	10.7%	8	0.0%	0
Iceland, Llynfi Road, Maesteg	0.7%	4	0.0%	0	0.0%	0	5.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Bridgend Retail Park, Bridgend	2.6%	15	7.7%	6	3.8%	3	0.0%	0	7.4%	5	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, Broadview, Tondu, Bridgend	1.2%	7	2.6%	2	0.0%	0	1.4%	1	5.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, High Street, Treorchy	3.0%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.9%	7	13.3%	10	0.0%	0
Marks & Spencer Outlet, McArthurGlen Designer Outlet, Bridgend	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Talbot Green Retail Park, Pontyclun	1.0%	6	0.0%	0	1.3%	1	0.0%	0	0.0%	0	6.7%	5	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	2.6%	15	3.8%	3	3.8%	3	1.4%	1	10.3%	7	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Tesco Express, Cowbridge Road, Pontyclun	0.4%	2	0.0%	0	1.3%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Coychurch Road, Pencoed, Bridgend	0.7%	4	5.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, District Centre Broadlands, Bridgend	1.6%	9	11.5%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, High Street, Cowbridge	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0

## Bridgend Borough Retail Study for Peter Brett Associates

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
Tesco Extra, Cowbridge Road, Bridgend	4.0%	23	12.8%	10	2.5%	2	4.2%	3	4.4%	3	2.7%	2	0.0%	0	1.3%	1	3.3%	2
Tesco Extra, Green Park, Talbot Green, Pontyclun	3.5%	20	0.0%	0	0.0%	0	0.0%	0	1.5%	1	18.7%	14	3.1%	2	2.7%	2	1.6%	1
Tesco, Brewery Lane, Bridgend	2.1%	12	7.7%	6	0.0%	0	2.8%	2	1.5%	1	2.7%	2	0.0%	0	0.0%	0	1.6%	1
Tesco, Castle Street, Maesteg	4.0%	23	0.0%	0	1.3%	1	25.0%	18	1.5%	1	0.0%	0	0.0%	0	4.0%	3	0.0%	0
Waitrose, Birds Lane, Cowbridge	1.7%	10	1.3%	1	1.3%	1	0.0%	0	0.0%	0	9.3%	7	0.0%	0	0.0%	0	1.6%	1
Bridgend Town Centre	2.3%	13	9.0%	7	0.0%	0	2.8%	2	4.4%	3	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Cardiff City Centre	0.9%	5	0.0%	0	2.5%	2	0.0%	0	0.0%	0	4.0%	3	0.0%	0	0.0%	0	0.0%	0
Cowbridge	0.9%	5	2.6%	2	0.0%	0	0.0%	0	1.5%	1	2.7%	2	0.0%	0	0.0%	0	0.0%	0
Kenfig Hill	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2
Lalestan/St Brides	0.5%	3	0.0%	0	3.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llantrisant	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Maesteg	2.3%	13	0.0%	0	0.0%	0	15.3%	11	0.0%	0	0.0%	0	0.0%	0	1.3%	1	1.6%	1
Margam	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2
Merthyr Tydfil	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	1.6%	1
Pencoed	1.0%	6	0.0%	0	0.0%	0	0.0%	0	8.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	4	0.0%	0	0.0%	0	0.0%	0
Port Talbot	1.6%	9	0.0%	0	2.5%	2	0.0%	0	0.0%	0	1.3%	1	0.0%	0	2.7%	2	6.6%	4
Porthcawl	3.3%	19	0.0%	0	24.1%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pyle	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea	0.7%	4	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	3.3%	2
Tondu	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tonypanyd	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	4	0.0%	0	0.0%	0
Treorchy	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	3	0.0%	0
Aldi, Commercial Road, Port Talbot	1.7%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	3	3.1%	2	2.7%	2	4.9%	3
Tesco, Prior Street, Port Talbot	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.6%	4
Picton Court Retail Park, Waterton, Bridgend	1.2%	7	1.3%	1	0.0%	0	1.4%	1	4.4%	3	0.0%	0	1.6%	1	0.0%	0	1.6%	1
Lidl, Baglan Way Retail Park, Afan Way, Port Talbot,	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Baglan Industrial Park, Christchurch Road, Port Talbot	0.4%	2	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Aldi, Cymmer Road, Porth, CF39 9BQ	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	3	0.0%	0	0.0%	0
Cardiff - out of centre	1.2%	7	1.3%	1	1.3%	1	0.0%	0	2.9%	2	4.0%	3	0.0%	0	0.0%	0	0.0%	0
Bridgend - out of centre	0.4%	2	0.0%	0	0.0%	0	1.4%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Cymmer Road, Porth, CF39 9BL	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Morrisons, Pontypridd Road, Porth, CF39 9PH	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Spar, Bute Street, Treherbert, Treorchy, CF42 5NR	1.9%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.7%	11	0.0%	0
Treherbert	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Other, zone 1	0.2%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 2	0.4%	2	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 4	1.0%	6	0.0%	0	0.0%	0	0.0%	0	8.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 5	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	1.4%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.5%	8	0.0%	0	0.0%	0
Other, zone 7	1.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	6	0.0%	0
Other, zone 8	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	3
Other, outside area	2.1%	12	0.0%	0	1.3%	1	0.0%	0	1.5%	1	1.3%	1	10.9%	7	2.7%	2	0.0%	0
Internet / delivered (Don't know / can't remember)	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	1.6%	1
	1.0%	6	0.0%	0	3.8%	3	0.0%	0	0.0%	0	0.0%	0	3.1%	2	1.3%	1	0.0%	0
Base:		572		78		79		72		68		75		64		75		61

# Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Mean score [£]:</b>																		
<b>Q09 Approximately how much money does your household spend per week on top-up food and groceries shopping (STORE MENTIONED AT Q07)?</b>																		
<i>Not 'Don't do' or 'Don't know' at Q07</i>																		
£1 - 10	33.2%	190	24.4%	19	43.0%	34	26.4%	19	32.4%	22	29.3%	22	26.6%	17	46.7%	35	36.1%	22
£11 - 20	24.7%	141	34.6%	27	13.9%	11	22.2%	16	23.5%	16	25.3%	19	25.0%	16	24.0%	18	29.5%	18
£21 - 30	14.2%	81	14.1%	11	12.7%	10	18.1%	13	14.7%	10	16.0%	12	15.6%	10	12.0%	9	9.8%	6
£31 - 40	3.5%	20	3.8%	3	2.5%	2	6.9%	5	0.0%	0	6.7%	5	3.1%	2	2.7%	2	1.6%	1
£41 - 50	2.8%	16	5.1%	4	5.1%	4	1.4%	1	4.4%	3	1.3%	1	1.6%	1	2.7%	2	0.0%	0
£51 - 60	0.7%	4	0.0%	0	1.3%	1	0.0%	0	1.5%	1	1.3%	1	1.6%	1	0.0%	0	0.0%	0
£61 - 70	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£71 - 80	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	1.6%	1
£81 - 90	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£91 - 100	0.2%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£101 - 150	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£151 - 200	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£201+	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
(Don't know / varies)	17.8%	102	17.9%	14	19.0%	15	22.2%	16	20.6%	14	12.0%	9	23.4%	15	9.3%	7	19.7%	12
(Refused)	2.4%	14	0.0%	0	2.5%	2	1.4%	1	2.9%	2	6.7%	5	3.1%	2	1.3%	1	1.6%	1
<i>Mean:</i>		<i>18.21</i>		<i>19.42</i>		<i>16.48</i>		<i>20.13</i>		<i>17.81</i>		<i>20.15</i>		<i>18.26</i>		<i>17.52</i>		<i>15.56</i>
<i>Base:</i>		<i>572</i>		<i>78</i>		<i>79</i>		<i>72</i>		<i>68</i>		<i>75</i>		<i>64</i>		<i>75</i>		<i>61</i>
<b>Q09A When your household undertakes its top-up food and grocery spend (STORE MENTIONED AT Q07) does it visit other shops, leisure or service outlets on the same shopping trips? And if so which ones? [MR]</b>																		
<i>Not 'Don't do' or 'Don't know' or 'Internet' at Q07</i>																		
Yes - other food shops	6.9%	39	2.6%	2	9.0%	7	8.3%	6	5.9%	4	2.7%	2	7.8%	5	14.7%	11	3.3%	2
Yes - other non food shops (clothing, footwear, electrical etc)	9.5%	54	14.1%	11	10.3%	8	4.2%	3	10.3%	7	9.5%	7	7.8%	5	13.3%	10	5.0%	3
Yes - pubs, restaurants or cafes	3.3%	19	5.1%	4	0.0%	0	1.4%	1	1.5%	1	2.7%	2	3.1%	2	10.7%	8	1.7%	1
Yes - financial service (i.e. bank, building society)	3.2%	18	0.0%	0	6.4%	5	1.4%	1	4.4%	3	2.7%	2	0.0%	0	8.0%	6	1.7%	1
Yes - other service (e.g. hairdresser, travel agent, estate agent)	2.6%	15	0.0%	0	3.8%	3	0.0%	0	5.9%	4	4.1%	3	0.0%	0	5.3%	4	1.7%	1
Yes - leisure activity	4.2%	24	0.0%	0	3.8%	3	2.8%	2	8.8%	6	2.7%	2	9.4%	6	4.0%	3	3.3%	2
Yes - other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(No)	72.2%	411	76.9%	60	69.2%	54	80.6%	58	66.2%	45	78.4%	58	75.0%	48	56.0%	42	76.7%	46
(Don't know / varies)	4.0%	23	5.1%	4	3.8%	3	4.2%	3	4.4%	3	1.4%	1	3.1%	2	2.7%	2	8.3%	5
<i>Base:</i>		<i>569</i>		<i>78</i>		<i>78</i>		<i>72</i>		<i>68</i>		<i>74</i>		<i>64</i>		<i>75</i>		<i>60</i>
<b>Q10 Does your household also spend money on food and groceries in small shops or market stalls? (i.e., not supermarkets)</b>																		
Yes	37.8%	302	32.0%	32	48.0%	48	36.0%	36	29.0%	29	35.0%	35	37.0%	37	48.0%	48	37.0%	37
No	62.3%	498	68.0%	68	52.0%	52	64.0%	64	71.0%	71	65.0%	65	63.0%	63	52.0%	52	63.0%	63
<i>Base:</i>		<i>800</i>		<i>100</i>		<i>100</i>		<i>100</i>		<i>100</i>		<i>100</i>		<i>100</i>		<i>100</i>		<i>100</i>



# Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q11 Where are these small shops or market stalls located?</b>																		
<i>Yes at Q10</i>																		
Aberkenfig (Valleys Gateway)	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0
Bridgend Town Centre	19.2%	58	87.5%	28	16.7%	8	13.9%	5	34.5%	10	0.0%	0	2.7%	1	0.0%	0	16.2%	6
Cardiff City Centre	2.3%	7	3.1%	1	0.0%	0	0.0%	0	6.9%	2	2.9%	1	8.1%	3	0.0%	0	0.0%	0
Cowbridge	3.0%	9	6.3%	2	0.0%	0	0.0%	0	6.9%	2	14.3%	5	0.0%	0	0.0%	0	0.0%	0
Kenfig Hill	5.3%	16	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	40.5%	15
Llantrisant	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.6%	3	0.0%	0	0.0%	0	0.0%	0
Maesteg	10.6%	32	0.0%	0	0.0%	0	75.0%	27	3.4%	1	0.0%	0	0.0%	0	8.3%	4	0.0%	0
Merthyr Tydfil	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0
Neath	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	2	2.7%	1
Pencoed	3.6%	11	0.0%	0	0.0%	0	0.0%	0	37.9%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	2.6%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.9%	8	0.0%	0	0.0%	0	0.0%	0
Pontypridd	1.3%	4	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0	2.7%	1	4.2%	2	0.0%	0
Port Talbot	2.3%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	3	10.8%	4
Porthcawl	13.9%	42	3.1%	1	72.9%	35	0.0%	0	3.4%	1	0.0%	0	5.4%	2	0.0%	0	8.1%	3
Pyle	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	2
Swansea	2.3%	7	0.0%	0	0.0%	0	8.3%	3	0.0%	0	0.0%	0	2.7%	1	0.0%	0	8.1%	3
Talbot Green Shopping Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0
Talbot Green Town Centre	3.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.9%	8	5.4%	2	0.0%	0	0.0%	0
Tonypanyd	4.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	35.1%	13	0.0%	0	0.0%	0
Tonyrefail	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	2	0.0%	0	0.0%	0
Treorchy	7.6%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.1%	3	41.7%	20	0.0%	0
Cardiff - out of centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0
Treherbert	3.6%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.9%	11	0.0%	0
Other, zone 5	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	2	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	1.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.5%	5	0.0%	0	0.0%	0
Other, zone 7	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	3	0.0%	0
Other, outside area	2.6%	8	0.0%	0	2.1%	1	0.0%	0	0.0%	0	5.7%	2	2.7%	1	4.2%	2	5.4%	2
(Don't know / can't remember)	4.0%	12	0.0%	0	6.3%	3	2.8%	1	3.4%	1	11.4%	4	2.7%	1	2.1%	1	2.7%	1
Base:		302		32		48		36		29		35		37		48		37

**Mean score [£]:****Q12 Approximately how much money does your household spend per week on food and groceries in these small shops?***Yes at Q10*

£1 - 10	44.4%	134	34.4%	11	43.8%	21	25.0%	9	37.9%	11	48.6%	17	54.1%	20	60.4%	29	43.2%	16
£11 - 20	20.5%	62	25.0%	8	18.8%	9	30.6%	11	17.2%	5	25.7%	9	13.5%	5	16.7%	8	18.9%	7
£21 - 30	4.6%	14	9.4%	3	8.3%	4	0.0%	0	0.0%	0	11.4%	4	2.7%	1	2.1%	1	2.7%	1
£31 - 40	2.3%	7	0.0%	0	2.1%	1	2.8%	1	3.4%	1	0.0%	0	0.0%	0	6.3%	3	2.7%	1
£41 - 50	0.7%	2	3.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0
£51 - 60	1.3%	4	0.0%	0	0.0%	0	2.8%	1	3.4%	1	0.0%	0	2.7%	1	0.0%	0	2.7%	1
£61 - 70	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£71 - 80	0.7%	2	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1
£81 - 90	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£91 - 100	0.7%	2	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0
£101 - 150	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£151 - 200	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£201+	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	21.9%	66	28.1%	9	25.0%	12	33.3%	12	31.0%	9	8.6%	3	21.6%	8	10.4%	5	21.6%	8
(Refused)	3.0%	9	0.0%	0	2.1%	1	0.0%	0	6.9%	2	5.7%	2	5.4%	2	0.0%	0	5.4%	2
Mean:		14.56		14.61		12.97		22.25		13.83		13.70		10.11		14.28		16.07
Base:		302		32		48		36		29		35		37		48		37

# Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Mean score [%]:</b>																		
<b>Q13 Approximately what proportion of your household's total spending on all food and grocery goods is done using the Internet?</b>																		
0% - 10%	81.9%	655	87.0%	87	68.0%	68	79.0%	79	77.0%	77	83.0%	83	90.0%	90	87.0%	87	84.0%	84
11% - 20%	1.6%	13	2.0%	2	2.0%	2	0.0%	0	5.0%	5	1.0%	1	1.0%	1	2.0%	2	0.0%	0
21% - 30%	1.3%	10	2.0%	2	0.0%	0	1.0%	1	2.0%	2	1.0%	1	1.0%	1	1.0%	1	2.0%	2
31% - 40%	0.6%	5	1.0%	1	2.0%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1
41% - 50%	1.9%	15	3.0%	3	5.0%	5	1.0%	1	0.0%	0	2.0%	2	2.0%	2	2.0%	2	0.0%	0
51% - 60%	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
61% - 70%	0.6%	5	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1	1.0%	1	1.0%	1	0.0%	0
71% - 80%	1.5%	12	0.0%	0	2.0%	2	0.0%	0	2.0%	2	2.0%	2	2.0%	2	1.0%	1	3.0%	3
81% - 90%	2.4%	19	0.0%	0	2.0%	2	2.0%	2	2.0%	2	5.0%	5	1.0%	1	3.0%	3	4.0%	4
91% - 100%	0.6%	5	0.0%	0	1.0%	1	0.0%	0	1.0%	1	2.0%	2	0.0%	0	1.0%	1	0.0%	0
(Don't know / varies)	3.9%	31	1.0%	1	8.0%	8	11.0%	11	2.0%	2	2.0%	2	2.0%	2	0.0%	0	5.0%	5
(Refused)	3.6%	29	4.0%	4	9.0%	9	6.0%	6	7.0%	7	0.0%	0	0.0%	0	2.0%	2	1.0%	1
<i>Mean:</i>		<i>7.02</i>		<i>3.05</i>		<i>10.57</i>		<i>3.49</i>		<i>7.90</i>		<i>11.02</i>		<i>5.29</i>		<i>7.10</i>		<i>7.71</i>
<i>Base:</i>		800		100		100		100		100		100		100		100		100

# Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q14 So, speaking as an individual, can you tell me where you last made a purchase of clothes or shoes?</b>																		
Aldi, Brackla Street, Bridgend	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Colliers Way, Tonypany	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	5.0%	5	1.0%	1	0.0%	0
Asda, Coychurch Road, Bridgend	1.0%	8	2.0%	2	0.0%	0	0.0%	0	4.0%	4	1.0%	1	0.0%	0	1.0%	1	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.6%	5	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Marks & Spencer Outlet, McArthurGlen Designer Outlet, Bridgend	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Talbot Green Retail Park, Pontyclun	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	0.4%	3	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	0.5%	4	2.0%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Tesco Extra, Green Park, Talbot Green, Pontyclun	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	1.0%	1	0.0%	0	1.0%	1
Tesco, Castle Street, Maesteg	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Aberkenfig (Valleys Gateway)	0.4%	3	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Bridgend Town Centre	11.6%	93	29.0%	29	10.0%	10	17.0%	17	21.0%	21	4.0%	4	1.0%	1	0.0%	0	11.0%	11
Caerphilly	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Cardiff Bay	0.4%	3	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	14.1%	113	18.0%	18	18.0%	18	14.0%	14	14.0%	14	22.0%	22	11.0%	11	7.0%	7	9.0%	9
Cowbridge	1.1%	9	2.0%	2	1.0%	1	1.0%	1	0.0%	0	4.0%	4	1.0%	1	0.0%	0	0.0%	0
Llantrisant	3.4%	27	3.0%	3	1.0%	1	1.0%	1	5.0%	5	3.0%	3	10.0%	10	3.0%	3	1.0%	1
Maesteg	1.5%	12	0.0%	0	0.0%	0	12.0%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merthyr Tydfil	0.9%	7	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0
Neath	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1
Newport City Centre	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pencoed	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Pontypridd	1.9%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	8	7.0%	7	0.0%	0	0.0%	0
Port Talbot	3.1%	25	0.0%	0	3.0%	3	2.0%	2	0.0%	0	2.0%	2	0.0%	0	7.0%	7	11.0%	11
Porthcawl	2.9%	23	2.0%	2	13.0%	13	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.0%	2	5.0%	5
Pyle	0.3%	2	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea City Centre	4.8%	38	1.0%	1	2.0%	2	8.0%	8	3.0%	3	2.0%	2	1.0%	1	6.0%	6	15.0%	15
Talbot Green Town Centre	2.4%	19	0.0%	0	0.0%	0	1.0%	1	2.0%	2	7.0%	7	5.0%	5	4.0%	4	0.0%	0
Tonypany	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	2.0%	2	0.0%	0
Treorchy	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	2.0%	2	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	0.5%	4	1.0%	1	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Bridgend Shopping Centre, Cheapside, Bridgend	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glamorgan Vale Retail Park, Talbot Green	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1	1.0%	1	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	11.9%	95	19.0%	19	12.0%	12	12.0%	12	19.0%	19	6.0%	6	10.0%	10	6.0%	6	11.0%	11
Talbot Green Shopping Park	4.9%	39	1.0%	1	1.0%	1	1.0%	1	2.0%	2	15.0%	15	14.0%	14	4.0%	4	1.0%	1
Waterton Retail Park, Waterton Road, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Cardiff - out of centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.0%	3	1.0%	1
Marks & Spencer, Copthorne Way, Cardiff, CF5 6YZ	0.4%	3	0.0%	0	2.0%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Porth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Other, outside area	1.3%	10	3.0%	3	2.0%	2	0.0%	0	0.0%	0	2.0%	2	1.0%	1	1.0%	1	1.0%	1
Internet / delivered	14.0%	112	9.0%	9	16.0%	16	15.0%	15	17.0%	17	15.0%	15	9.0%	9	15.0%	15	16.0%	16
Home catalogue	2.5%	20	0.0%	0	3.0%	3	1.0%	1	2.0%	2	2.0%	2	2.0%	2	7.0%	7	3.0%	3
TV / interactive shopping	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	2.3%	18	3.0%	3	3.0%	3	2.0%	2	1.0%	1	2.0%	2	1.0%	1	4.0%	4	2.0%	2
(Don't do this type of shopping)	5.0%	40	2.0%	2	3.0%	3	9.0%	9	4.0%	4	2.0%	2	6.0%	6	6.0%	6	8.0%	8
Base:	800	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

Column %ges.

# Bridgend Borough Retail Study for Peter Brett Associates

Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
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**Mean score [Times a year]: Everyday = 365, 5 - 6 times a week = 286, 3 - 4 times a week = 182, Twice a week = 104, Once a week = 52, Once every two weeks = 26, Once a month = 12, Once every two months = 6, 3 or 4 times a year = 3.5, Twice a year = 2, Once a year = 1, Less often = 0.5**

**Q15 How often do you visit (LOCATION MENTIONED AT Q14) for clothes or shoes shopping?**

*Not 'Don't do' or 'Don't know' at Q14*

Everyday	1.2%	9	3.2%	3	4.3%	4	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.1%	1	0.0%	0
5 - 6 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
3 - 4 times a week	1.1%	8	1.1%	1	2.1%	2	1.1%	1	0.0%	0	0.0%	0	2.2%	2	1.1%	1	1.1%	1
Twice a week	0.7%	5	0.0%	0	1.1%	1	2.2%	2	0.0%	0	1.0%	1	0.0%	0	1.1%	1	0.0%	0
Once a week	5.0%	37	2.1%	2	5.3%	5	5.6%	5	5.3%	5	6.3%	6	4.3%	4	1.1%	1	10.0%	9
Once every two weeks	5.9%	44	5.3%	5	9.6%	9	4.5%	4	5.3%	5	6.3%	6	7.5%	7	5.6%	5	3.3%	3
Once a month	21.7%	161	28.4%	27	22.3%	21	19.1%	17	26.3%	25	22.9%	22	20.4%	19	14.4%	13	18.9%	17
Once every two months	15.6%	116	11.6%	11	7.4%	7	16.9%	15	14.7%	14	20.8%	20	23.7%	22	15.6%	14	14.4%	13
3 or 4 times a year	11.9%	88	13.7%	13	11.7%	11	7.9%	7	9.5%	9	14.6%	14	8.6%	8	16.7%	15	12.2%	11
Twice a year	10.1%	75	10.5%	10	4.3%	4	7.9%	7	7.4%	7	16.7%	16	8.6%	8	16.7%	15	8.9%	8
Once a year	2.7%	20	0.0%	0	1.1%	1	4.5%	4	3.2%	3	2.1%	2	3.2%	3	4.4%	4	3.3%	3
Less often	6.7%	50	6.3%	6	12.8%	12	12.4%	11	6.3%	6	1.0%	1	5.4%	5	4.4%	4	5.6%	5
(Don't know / varies)	17.4%	129	17.9%	17	18.1%	17	18.0%	16	22.1%	21	7.3%	7	16.1%	15	17.8%	16	22.2%	20
<i>Mean:</i>		<i>18.69</i>		<i>25.25</i>		<i>35.97</i>		<i>15.01</i>		<i>11.16</i>		<i>15.78</i>		<i>14.92</i>		<i>15.70</i>		<i>15.29</i>
Base:		742		95		94		89		95		96		93		90		90

**Q16 How do you normally travel to (LOCATION MENTIONED AT Q14)?**

*Not 'Don't do' or 'Don't know' or Internet / delivery at Q14*

Car - Driver	72.6%	442	75.3%	64	81.3%	61	78.1%	57	80.3%	61	70.9%	56	70.7%	58	55.9%	38	66.2%	47
Car - Passenger	10.0%	61	8.2%	7	5.3%	4	5.5%	4	10.5%	8	6.3%	5	12.2%	10	23.5%	16	9.9%	7
Bus	11.0%	67	8.2%	7	6.7%	5	12.3%	9	6.6%	5	13.9%	11	13.4%	11	10.3%	7	16.9%	12
Cycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Disabled vehicle (e.g. mobility scooter)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Taxi	0.3%	2	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Train	2.5%	15	1.2%	1	0.0%	0	1.4%	1	1.3%	1	1.3%	1	1.2%	1	8.8%	6	5.6%	4
Walk	3.0%	18	7.1%	6	5.3%	4	2.7%	2	0.0%	0	6.3%	5	1.2%	1	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.7%	4	0.0%	0	0.0%	0	0.0%	0	1.3%	1	1.3%	1	1.2%	1	1.5%	1	0.0%	0
Base:		609		85		75		73		76		79		82		68		71

# Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q17 And the time before that, where did your household go to make a purchase of clothes or shoes?</b>																		
<i>Not 'Don't do' or 'Don't know' at Q14</i>																		
Asda, Colliers Way, Tonypany	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.2%	2	1.1%	1	0.0%	0
Asda, Coychurch Road, Bridgend	1.2%	9	3.2%	3	1.1%	1	0.0%	0	1.1%	1	2.1%	2	1.1%	1	1.1%	1	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.4%	3	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2
Marks & Spencer Outlet, McArthurGlen Designer Outlet, Bridgend	0.3%	2	1.1%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Talbot Green Retail Park, Pontyclun	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2
Tesco Extra, Cowbridge Road, Bridgend	0.8%	6	2.1%	2	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	1.1%	1
Tesco Extra, Green Park, Talbot Green, Pontyclun	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, Brewery Lane, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, Castle Street, Maesteg	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Aberkenfig (Valleys Gateway)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0
Bridgend Town Centre	10.9%	81	23.2%	22	7.4%	7	15.7%	14	22.1%	21	2.1%	2	4.3%	4	0.0%	0	12.2%	11
Caerphilly	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Cardiff Bay	0.4%	3	1.1%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	22.0%	163	29.5%	28	20.2%	19	25.8%	23	25.3%	24	24.0%	23	18.3%	17	15.6%	14	16.7%	15
Cowbridge	0.7%	5	1.1%	1	2.1%	2	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0
Llantrisant	2.4%	18	2.1%	2	1.1%	1	0.0%	0	2.1%	2	2.1%	2	7.5%	7	4.4%	4	0.0%	0
Maesteg	1.3%	10	0.0%	0	0.0%	0	9.0%	8	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0
Merthyr Tydfil	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	1.1%	1	0.0%	0
Neath	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	2.2%	2
Pontyclun	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Pontypridd	1.8%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.7%	9	4.4%	4	0.0%	0
Port Talbot	2.7%	20	0.0%	0	1.1%	1	4.5%	4	0.0%	0	1.0%	1	0.0%	0	7.8%	7	7.8%	7
Porthcawl	1.3%	10	1.1%	1	8.5%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Pyle	0.3%	2	0.0%	0	1.1%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea City Centre	7.0%	52	4.2%	4	3.2%	3	18.0%	16	3.2%	3	0.0%	0	2.2%	2	4.4%	4	22.2%	20
Talbot Green Town Centre	3.0%	22	0.0%	0	0.0%	0	0.0%	0	1.1%	1	12.5%	12	5.4%	5	4.4%	4	0.0%	0
Tonypany	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Treorchy	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	5.6%	5	0.0%	0
Aberfan Shopping Centre, Port Talbot	0.3%	2	0.0%	0	1.1%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	0.7%	5	1.1%	1	2.1%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.1%	1
Glamorgan Vale Retail Park, Talbot Green	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	11.2%	83	8.4%	8	20.2%	19	4.5%	4	18.9%	18	14.6%	14	7.5%	7	5.6%	5	8.9%	8
Talbot Green Shopping Park	5.0%	37	2.1%	2	0.0%	0	1.1%	1	3.2%	3	11.5%	11	16.1%	15	2.2%	2	3.3%	3
Abroad	0.4%	3	2.1%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Cardiff - out of centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	5.6%	5	1.1%	1
Enterprise Retail Park, Nantyffin Road, Llansamlet, Swansea, SA7 9RF	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0
Marks & Spencer, Copthorne Way, Cardiff, CF5 6YZ	0.8%	6	1.1%	1	3.2%	3	0.0%	0	0.0%	0	1.0%	1	1.1%	1	0.0%	0	0.0%	0
Other, outside area	1.5%	11	3.2%	3	2.1%	2	0.0%	0	1.1%	1	2.1%	2	1.1%	1	2.2%	2	0.0%	0
Internet / delivered	12.7%	94	11.6%	11	13.8%	13	15.7%	14	14.7%	14	11.5%	11	5.4%	5	14.4%	13	14.4%	13
Home catalogue	2.2%	16	1.1%	1	2.1%	2	1.1%	1	2.1%	2	2.1%	2	3.2%	3	4.4%	4	1.1%	1
(Don't know / can't remember)	3.6%	27	1.1%	1	5.3%	5	3.4%	3	4.2%	4	3.1%	3	4.3%	4	5.6%	5	2.2%	2
Base:		742		95		94		89		95		96		93		90		90

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q18 Now can you tell me where your household last made a purchase of furniture, carpets, or soft household furnishings?</b>																		
Asda, Colliers Way, Tonypandy	0.3%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Coychurch Road, Bridgend	0.3%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Sainsbury's, The Derwen, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Brewery Lane, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Aberkenfig (Valleys Gateway)	1.6%	13	5.0%	5	0.0%	0	2.0%	2	4.0%	4	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Barry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	7.4%	59	15.0%	15	6.0%	6	12.0%	12	10.0%	10	8.0%	8	2.0%	2	2.0%	2	4.0%	4
Caerphilly	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff Bay	0.4%	3	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Cardiff City Centre	4.9%	39	5.0%	5	8.0%	8	6.0%	6	5.0%	5	9.0%	9	1.0%	1	0.0%	0	5.0%	5
Cowbridge	0.4%	3	0.0%	0	0.0%	0	1.0%	1	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Kenfig Hill	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Lalestan/St Brides	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llantrisant	2.9%	23	7.0%	7	1.0%	1	1.0%	1	3.0%	3	4.0%	4	4.0%	4	2.0%	2	1.0%	1
Llantwit Major	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Maesteg	2.4%	19	1.0%	1	0.0%	0	13.0%	13	0.0%	0	0.0%	0	0.0%	0	4.0%	4	1.0%	1
Merthyr Tydfil	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	4.0%	4	0.0%	0
Neath	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Ogmore Vale	0.3%	2	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pencoed	0.4%	3	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Pontyclun	1.9%	15	1.0%	1	1.0%	1	0.0%	0	0.0%	0	9.0%	9	3.0%	3	0.0%	0	1.0%	1
Pontycymer	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontypridd	1.0%	8	0.0%	0	0.0%	0	1.0%	1	1.0%	1	1.0%	1	4.0%	4	1.0%	1	0.0%	0
Port Talbot	2.0%	16	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2	12.0%	12
Porthcawl	0.8%	6	0.0%	0	5.0%	5	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Pyle	1.3%	10	1.0%	1	2.0%	2	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	5.0%	5
Swansea City Centre	1.3%	10	0.0%	0	0.0%	0	4.0%	4	1.0%	1	0.0%	0	0.0%	0	1.0%	1	4.0%	4
Talbot Green Town Centre	1.0%	8	0.0%	0	0.0%	0	0.0%	0	2.0%	2	3.0%	3	1.0%	1	1.0%	1	1.0%	1
Tondu	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Tonypandy	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	7	1.0%	1	0.0%	0
Treorchy	2.3%	18	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	3.0%	3	14.0%	14	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	4.6%	37	6.0%	6	3.0%	3	2.0%	2	5.0%	5	7.0%	7	5.0%	5	1.0%	1	8.0%	8
Bridgend Shopping Centre, Cheapside, Bridgend	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glamorgan Vale Retail Park, Talbot Green	0.3%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	0.3%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Picton Court Retail Park, Waterton, Bridgend	0.6%	5	1.0%	1	0.0%	0	0.0%	0	2.0%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0
Talbot Green Shopping Park	1.5%	12	0.0%	0	0.0%	0	0.0%	0	3.0%	3	4.0%	4	4.0%	4	1.0%	1	0.0%	0
Waterton Retail Park, Waterton Road, Bridgend	1.1%	9	1.0%	1	1.0%	1	0.0%	0	4.0%	4	0.0%	0	1.0%	1	2.0%	2	0.0%	0
Brown Lennox Retail Park, Ynysangharad Road, Pontypridd, CF37 4DA	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Capital Shopping Park, Leckwith Road, Cardiff, CF11 8EG	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Cardiff - out of centre	0.9%	7	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	1.0%	1	4.0%	4	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0
Enterprise Retail Park, Nantyffin Road, Llansamlet, Swansea, SA7 9RF	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	1.0%	1
Gelli	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0
Ikea, Ferry Road, Cardiff, CF11 0XR	1.1%	9	0.0%	0	1.0%	1	1.0%	1	1.0%	1	3.0%	3	3.0%	3	0.0%	0	0.0%	0
Marks & Spencer, Copthorne Way, Cardiff, CF5 6YZ	0.5%	4	0.0%	0	2.0%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Porth	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0

## Bridgend Borough Retail Study for Peter Brett Associates

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
Ton Pentre	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	2.0%	2	0.0%	0
Other, zone 1	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 4	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Other, zone 5	0.5%	4	1.0%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0
Other, zone 6	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Other, outside area	1.0%	8	0.0%	0	2.0%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1	3.0%	3
Internet / delivered	6.6%	53	5.0%	5	14.0%	14	3.0%	3	7.0%	7	2.0%	2	10.0%	10	6.0%	6	6.0%	6
Home catalogue	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2
(Don't know / can't remember)	7.5%	60	9.0%	9	14.0%	14	5.0%	5	6.0%	6	4.0%	4	5.0%	5	13.0%	13	4.0%	4
(Don't do this type of shopping)	34.8%	278	39.0%	39	37.0%	37	42.0%	42	34.0%	34	32.0%	32	34.0%	34	25.0%	25	35.0%	35
Base:		800		100		100		100		100		100		100		100		100



# Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q19 And the time before that, where did your household go to make a purchase of furniture, carpets, or soft household furnishings?</b>																		
<i>Not 'Don't do' or 'Don't know' at Q18</i>																		
Asda, Colliers Way, Tonypany	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	1.6%	1	0.0%	0
Asda, Coychurch Road, Bridgend	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Sainsbury's, The Derwen, Bridgend	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Castle Street, Maesteg	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Aberkenfig (Valleys Gateway)	0.6%	3	1.9%	1	0.0%	0	1.9%	1	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	11.5%	53	25.0%	13	12.2%	6	24.5%	13	16.7%	10	6.3%	4	1.6%	1	1.6%	1	8.2%	5
Caerphilly	0.6%	3	0.0%	0	0.0%	0	0.0%	0	1.7%	1	3.1%	2	0.0%	0	0.0%	0	0.0%	0
Cardiff Bay	0.9%	4	0.0%	0	0.0%	0	1.9%	1	0.0%	0	3.1%	2	1.6%	1	0.0%	0	0.0%	0
Cardiff City Centre	8.9%	41	13.5%	7	14.3%	7	18.9%	10	8.3%	5	7.8%	5	3.3%	2	1.6%	1	6.6%	4
Cowbridge	1.3%	6	1.9%	1	0.0%	0	1.9%	1	0.0%	0	6.3%	4	0.0%	0	0.0%	0	0.0%	0
Hendreforgan	0.2%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kenfig Hill	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lalestan/St Brides	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llantrisant	6.1%	28	9.6%	5	6.1%	3	3.8%	2	6.7%	4	7.8%	5	8.2%	5	4.8%	3	1.6%	1
Maesteg	3.0%	14	0.0%	0	0.0%	0	20.8%	11	0.0%	0	0.0%	0	0.0%	0	3.2%	2	1.6%	1
Merthyr Tydfil	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	3	0.0%	0
Ogmore Vale	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pencoed	0.9%	4	0.0%	0	0.0%	0	0.0%	0	5.0%	3	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Pontyclun	2.6%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.5%	8	4.9%	3	0.0%	0	1.6%	1
Pontycymer	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontypridd	2.2%	10	0.0%	0	0.0%	0	1.9%	1	1.7%	1	0.0%	0	8.2%	5	4.8%	3	0.0%	0
Port Talbot	3.0%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	4	16.4%	10
Porthcawl	1.1%	5	0.0%	0	10.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pyle	0.9%	4	1.9%	1	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2
Swansea City Centre	1.9%	9	1.9%	1	2.0%	1	3.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.2%	5
Talbot Green Town Centre	1.7%	8	0.0%	0	0.0%	0	0.0%	0	3.3%	2	3.1%	2	3.3%	2	1.6%	1	1.6%	1
Tondu	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Tonypany	1.5%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.5%	7	0.0%	0	0.0%	0
Treorchy	3.2%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	3	19.4%	12	0.0%	0
Aberfan Shopping Centre, Port Talbot	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Bridgend Retail Park, Cowbridge Road, Bridgend	6.1%	28	13.5%	7	6.1%	3	1.9%	1	0.0%	0	10.9%	7	1.6%	1	4.8%	3	9.8%	6
Bridgend Shopping Centre, Cheapside, Bridgend	0.2%	1	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	0.9%	4	1.9%	1	0.0%	0	0.0%	0	1.7%	1	1.6%	1	0.0%	0	0.0%	0	1.6%	1
Picton Court Retail Park, Waterton, Bridgend	0.9%	4	0.0%	0	0.0%	0	0.0%	0	3.3%	2	1.6%	1	0.0%	0	1.6%	1	0.0%	0
Talbot Green Shopping Park	3.0%	14	1.9%	1	0.0%	0	0.0%	0	5.0%	3	7.8%	5	6.6%	4	1.6%	1	0.0%	0
Waterton Retail Park, Waterton Road, Bridgend	2.2%	10	1.9%	1	4.1%	2	1.9%	1	5.0%	3	0.0%	0	1.6%	1	1.6%	1	1.6%	1
B&Q, Ynysangharad Road, Pontypridd, CF37 4DA	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Brown Lennox Retail Park, Ynysangharad Road, Pontypridd, CF37 4DA	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Capital Shopping Park, Leckwith Road, Cardiff, CF11 8EG	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Cardiff - out of centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	1.6%	1	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Enterprise Retail Park, Nantyffin Road, Llansamlet, Swansea, SA7 9RF	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2	0.0%	0
Ikea, Ferry Road, Cardiff, CF11 0XR	2.4%	11	0.0%	0	2.0%	1	1.9%	1	1.7%	1	6.3%	4	1.6%	1	3.2%	2	1.6%	1
Marks & Spencer, Copthorne Way, Cardiff, CF5 6YZ	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	1.6%	1	0.0%	0
Porth	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	3	0.0%	0	0.0%	0

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
Ton Pentre	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2	1.6%	1	0.0%	0
Other, zone 1	0.4%	2	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Other, zone 5	0.4%	2	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Other, zone 6	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Other, outside area	1.5%	7	0.0%	0	4.1%	2	1.9%	1	0.0%	0	1.6%	1	1.6%	1	1.6%	1	1.6%	1
Internet / delivered	9.7%	45	5.8%	3	22.4%	11	7.5%	4	10.0%	6	4.7%	3	11.5%	7	6.5%	4	11.5%	7
Home catalogue	0.4%	2	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
(Don't know / can't remember)	12.8%	59	15.4%	8	12.2%	6	1.9%	1	18.3%	11	7.8%	5	14.8%	9	16.1%	10	14.8%	9
Base:		462		52		49		53		60		64		61		62		61

# Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q20 Now can you tell me where your household last made a purchase of DIY and decorating goods?</b>																		
Aldi, Llynfi Road, Maesteg	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Asda, Coychurch Road, Bridgend	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, High Street, Treorchy	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Aberkenfig (Valleys Gateway)	0.4%	3	1.0%	1	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Barry	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	12.0%	96	16.0%	16	11.0%	11	24.0%	24	17.0%	17	13.0%	13	4.0%	4	1.0%	1	10.0%	10
Cardiff Bay	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	0.8%	6	1.0%	1	1.0%	1	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0
Cowbridge	1.0%	8	2.0%	2	1.0%	1	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0	0.0%	0
Kenfig Hill	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Llantrisant	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	2.0%	2	1.0%	1	0.0%	0
Maesteg	3.4%	27	0.0%	0	0.0%	0	23.0%	23	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0
Margam	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Merthyr Tydfil	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1	0.0%	0
Newport City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Pencoed	0.4%	3	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Pontyclun	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0	1.0%	1
Pontycymer	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Pontypridd	3.4%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	21.0%	21	4.0%	4	0.0%	0
Port Talbot	1.6%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	9.0%	9
Porthcawl	0.6%	5	0.0%	0	5.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pyle	4.5%	36	1.0%	1	14.0%	14	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	20.0%	20
Swansea City Centre	0.9%	7	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	5.0%	5
Talbot Green Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Tonypanyd	1.1%	9	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	7.0%	7	1.0%	1	0.0%	0
Treorchy	2.6%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	18.0%	18	0.0%	0
Aberfan Shopping Centre, Port Talbot	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Bridgend Retail Park, Cowbridge Road, Bridgend	10.0%	80	23.0%	23	18.0%	18	0.0%	0	13.0%	13	16.0%	16	2.0%	2	4.0%	4	4.0%	4
Bridgend Shopping Centre, Cheapside, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Picton Court Retail Park, Waterton, Bridgend	0.8%	6	4.0%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0
Talbot Green Shopping Park	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Waterton Retail Park, Waterton Road, Bridgend	10.9%	87	7.0%	7	15.0%	15	10.0%	10	27.0%	27	10.0%	10	4.0%	4	4.0%	4	10.0%	10
B&Q, Cowbridge Road West, Culverhouse Cross, Cardiff, CF5 5TG	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.0%	9	0.0%	0	0.0%	0	0.0%	0
B&Q, Ynysangharad Road, Pontypridd, CF37 4DA	2.5%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.0%	11	9.0%	9	0.0%	0
Brown Lennox Retail Park, Ynysangharad Road, Pontypridd, CF37 4DA	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	5.0%	5	0.0%	0
Gelli	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Morfa Shopping Park, Brunel Way, Bon-y-maen, Swansea, SA1 7BP	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.0%	3
Porth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Ton Pentre	0.3%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Other, zone 1	0.3%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 2	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 5	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Other, outside area	0.9%	7	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	2.0%	2	2.0%	2	0.0%	0
Internet / delivered	1.8%	14	2.0%	2	4.0%	4	0.0%	0	1.0%	1	2.0%	2	3.0%	3	1.0%	1	1.0%	1
(Don't know / can't remember)	2.6%	21	3.0%	3	4.0%	4	1.0%	1	2.0%	2	3.0%	3	2.0%	2	4.0%	4	2.0%	2
(Don't do this type of shopping)	30.0%	240	36.0%	36	26.0%	26	40.0%	40	34.0%	34	12.0%	12	32.0%	32	31.0%	31	29.0%	29
Base:		800		100		100		100		100		100		100		100		100

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
<b>Q21 And the time before that, where did your household go to make a purchase of DIY and decorating goods?</b>									
<i>Not 'Don't do' or 'Don't know' at Q20</i>									
Aldi, Llynfi Road, Maesteg	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%
Aberkenfig (Valleys Gateway)	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.6%
Barry	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.2%
Bridgend Town Centre	16.9%	91	23.0%	14	12.9%	9	42.4%	25	28.1%
Cardiff Bay	0.4%	2	0.0%	0	0.0%	0	0.0%	0	2.4%
Cardiff City Centre	1.7%	9	1.6%	1	5.7%	4	0.0%	0	0.0%
Cowbridge	1.3%	7	3.3%	2	0.0%	0	0.0%	0	5.9%
Cwmbran	0.2%	1	0.0%	0	0.0%	0	1.7%	1	0.0%
Kenfig Hill	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%
Llantrisant	1.1%	6	0.0%	0	0.0%	0	0.0%	0	4.7%
Maesteg	3.0%	16	0.0%	0	0.0%	0	22.0%	13	0.0%
Merthyr Tydfil	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%
Newport City Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.2%
Pencoed	0.7%	4	0.0%	0	0.0%	0	0.0%	0	3.1%
Pontyclun	1.5%	8	0.0%	0	0.0%	0	0.0%	0	8.2%
Pontycymer	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.2%
Pontypridd	4.5%	24	0.0%	0	0.0%	0	1.7%	1	0.0%
Port Talbot	2.6%	14	0.0%	0	0.0%	0	0.0%	0	0.0%
Porthcawl	0.4%	2	0.0%	0	2.9%	2	0.0%	0	0.0%
Pyle	6.9%	37	3.3%	2	21.4%	15	3.4%	2	0.0%
Swansea City Centre	1.9%	10	0.0%	0	0.0%	0	3.4%	2	0.0%
Talbot Green Town Centre	0.7%	4	0.0%	0	0.0%	0	0.0%	0	4.7%
Tonypanyd	1.5%	8	0.0%	0	0.0%	0	0.0%	0	0.0%
Tonyrefail	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%
Treorchy	2.6%	14	0.0%	0	0.0%	0	0.0%	0	0.0%
Aberfan Shopping Centre, Port Talbot	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%
Bridgend Retail Park, Cowbridge Road, Bridgend	13.7%	74	37.7%	23	22.9%	16	0.0%	0	23.4%
Bridgend Shopping Centre, Cheapside, Bridgend	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.2%
Mcarthurglen Designer Outlet, Derwen, Bridgend	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%
Picton Court Retail Park, Waterton, Bridgend	1.1%	6	4.9%	3	1.4%	1	0.0%	0	1.2%
Talbot Green Shopping Park	0.7%	4	0.0%	0	0.0%	0	0.0%	0	3.5%
Waterton Retail Park, Waterton Road, Bridgend	15.4%	83	16.4%	10	18.6%	13	23.7%	14	29.7%
B&Q, Cowbridge Road West, Culverhouse Cross, Cardiff, CF5 5TG	1.9%	10	0.0%	0	0.0%	0	0.0%	0	11.8%
B&Q, Ynysangharad Road, Pontypridd, CF37 4DA	3.2%	17	0.0%	0	0.0%	0	0.0%	0	0.0%
Brown Lennox Retail Park, Ynysangharad Road, Pontypridd, CF37 4DA	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	1.7%	9	0.0%	0	0.0%	0	0.0%	0	0.0%
Gelli	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%
Morfa Shopping Park, Brunel Way, Bon-y-maen, Swansea, SA1 7BP	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%
Ton Pentre	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%
Other, zone 1	1.3%	7	4.9%	3	2.9%	2	0.0%	0	3.1%
Other, zone 2	0.2%	1	0.0%	0	1.4%	1	0.0%	0	0.0%
Other, zone 4	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.6%
Other, zone 5	0.7%	4	0.0%	0	1.4%	1	0.0%	0	0.0%
Other, outside area	1.7%	9	0.0%	0	0.0%	0	1.7%	1	0.0%
Internet / delivered (Don't know / can't remember)	2.4%	13	1.6%	1	4.3%	3	0.0%	0	6.3%
Base:	3.7%	20	3.3%	2	4.3%	3	0.0%	0	3.1%
		539		61		70		59	
								64	
									85
									66
									65
									69

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q22 Can you tell me where you or your household last made a purchase of electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones or computers?</b>																		
Aldi, Brackla Street, Bridgend	0.3%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Colliers Way, Tonypany	1.4%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	7	4.0%	4	0.0%	0
Asda, Coychurch Road, Bridgend	0.5%	4	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5
Lidl, High Street, Treorchy	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	1.5%	12	2.0%	2	4.0%	4	0.0%	0	3.0%	3	0.0%	0	1.0%	1	1.0%	1	1.0%	1
Tesco Extra, Green Park, Talbot Green, Pontyclun	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	1.0%	1	1.0%	1	0.0%	0
Aberkenfig (Valleys Gateway)	0.4%	3	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Barry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	8.5%	68	14.0%	14	4.0%	4	20.0%	20	15.0%	15	5.0%	5	1.0%	1	1.0%	1	8.0%	8
Cardiff Bay	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0
Cardiff City Centre	4.9%	39	0.0%	0	9.0%	9	4.0%	4	3.0%	3	16.0%	16	3.0%	3	3.0%	3	1.0%	1
Cowbridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Dolau	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llantrisant	0.4%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Maesteg	1.4%	11	0.0%	0	0.0%	0	8.0%	8	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0
Merthyr Tydfil	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	3.0%	3	0.0%	0
Pencoed	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0
Pontypridd	2.6%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	15.0%	15	5.0%	5	0.0%	0
Port Talbot	1.9%	15	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	3.0%	3	10.0%	10
Porthcawl	0.5%	4	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea City Centre	2.0%	16	0.0%	0	1.0%	1	3.0%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	11.0%	11
Talbot Green Town Centre	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	1.0%	1	1.0%	1	0.0%	0
Tonypany	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Treorchy	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0
Aberfan Shopping Centre, Port Talbot	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	14.3%	114	29.0%	29	18.0%	18	7.0%	7	17.0%	17	10.0%	10	1.0%	1	5.0%	5	27.0%	27
Bridgend Shopping Centre, Cheapside, Bridgend	0.4%	3	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Glamorgan Vale Retail Park, Talbot Green	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Mcarthurglen Designer Outlet, Derwen, Bridgend	1.0%	8	3.0%	3	1.0%	1	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Picton Court Retail Park, Waterton, Bridgend	0.3%	2	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rhiw Shopping Centre, Nolton Street, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Talbot Green Shopping Park	1.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	3.0%	3	1.0%	1	0.0%	0
Waterton Retail Park, Waterton Road, Bridgend	0.5%	4	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Abroad	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Brown Lennox Retail Park, Ynysangharad Road, Pontypridd, CF37 4DA	1.8%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.0%	9	5.0%	5	0.0%	0
Capital Shopping Park, Leckwith Road, Cardiff, CF11 8EG	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Cardiff - out of centre	0.4%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Currys PC World, Port Road, Culver House Cross, Cardiff, CF5 6XW	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	8.0%	8	0.0%	0
Marks & Spencer, Copthorne Way, Cardiff, CF5 6YZ	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morfa Shopping Park, Brunel Way, Bon-y-maen,	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	
Swansea, SA1 7BP										
Other, outside area	0.5%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Internet / delivered	12.4%	99	11.0%	11	13.0%	13	13.0%	13	11.0%	11
Home catalogue	1.0%	8	0.0%	0	1.0%	1	2.0%	2	1.0%	1
(Don't know / can't remember)	3.4%	27	4.0%	4	3.0%	3	3.0%	3	4.0%	4
(Don't do this type of shopping)	29.1%	233	36.0%	36	31.0%	31	34.0%	34	39.0%	39
Base:		800		100		100		100		100

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
<b>Q23 And the time before that, where you or your household last made a purchase of electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones or computers?</b>									
<i>Not 'Don't do' or 'Don't know' at Q22</i>									
Aldi, Brackla Street, Bridgend	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%
Asda, Colliers Way, Tonypany	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%
Asda, Coychurch Road, Bridgend	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%
Lidl, Bridgend Retail Park, Bridgend	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%
Sainsbury's, The Derwen, Bridgend	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%
Tesco Extra, Cowbridge Road, Bridgend	2.0%	11	5.0%	3	4.5%	3	0.0%	0	5.2%
Tesco Extra, Green Park, Talbot Green, Pontyclun	1.9%	10	0.0%	0	0.0%	0	0.0%	0	0.0%
Tesco, Brewery Lane, Bridgend	0.2%	1	1.7%	1	0.0%	0	0.0%	0	0.0%
Aberkenfig (Valleys Gateway)	0.7%	4	0.0%	0	1.5%	1	1.6%	1	3.4%
Bridgend Town Centre	12.2%	66	28.3%	17	10.6%	7	28.6%	18	20.7%
Cardiff City Centre	6.7%	36	1.7%	1	9.1%	6	4.8%	3	3.4%
Cowbridge	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%
Dolau	0.2%	1	0.0%	0	0.0%	0	1.6%	1	0.0%
Kenfig Hill	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%
Llantrisant	1.1%	6	0.0%	0	1.5%	1	0.0%	0	1.7%
Maesteg	2.0%	11	0.0%	0	0.0%	0	17.5%	11	0.0%
Margam	0.2%	1	0.0%	0	0.0%	0	1.6%	1	0.0%
Merthyr Tydfil	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%
Pencoed	0.2%	1	0.0%	0	0.0%	0	1.6%	1	0.0%
Pontyclun	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%
Pontypridd	2.6%	14	0.0%	0	0.0%	0	0.0%	0	0.0%
Port Talbot	2.0%	11	0.0%	0	0.0%	0	0.0%	0	0.0%
Porthcawl	0.9%	5	0.0%	0	4.5%	3	0.0%	0	0.0%
Pyle	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%
Swansea City Centre	3.0%	16	0.0%	0	1.5%	1	4.8%	3	0.0%
Talbot Green Town Centre	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%
Tonypany	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%
Tonyrefail	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%
Treorchy	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%
Aberfan Shopping Centre, Port Talbot	0.4%	2	0.0%	0	1.5%	1	0.0%	0	0.0%
Bridgend Retail Park, Cowbridge Road, Bridgend	18.1%	98	38.3%	23	25.8%	17	6.3%	4	24.1%
Bridgend Shopping Centre, Cheapside, Bridgend	0.7%	4	1.7%	1	1.5%	1	1.6%	1	0.0%
Glamorgan Vale Retail Park, Talbot Green	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%
Mcarthurglen Designer Outlet, Derwen, Bridgend	0.6%	3	1.7%	1	1.5%	1	1.6%	1	0.0%
Picton Court Retail Park, Waterton, Bridgend	0.4%	2	1.7%	1	0.0%	0	0.0%	0	1.7%
Rhiw Shopping Centre, Nolton Street, Bridgend	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%
Talbot Green Shopping Park	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%
Waterton Retail Park, Waterton Road, Bridgend	1.1%	6	1.7%	1	4.5%	3	0.0%	0	0.0%
Brown Lennox Retail Park, Ynysangharad Road, Pontypridd, CF37 4DA	3.0%	16	0.0%	0	0.0%	0	0.0%	0	0.0%
Capital Shopping Park, Leckwith Road, Cardiff, CF11 8EG	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%
Currys PC World, Port Road, Culver House Cross, Cardiff, CF5 6XW	1.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	1.5%	8	0.0%	0	0.0%	0	0.0%	0	0.0%



## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
Morfa Shopping Park, Brunel Way, Bon-y-maen, Swansea, SA1 7BP	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2
Other, outside area	1.1%	6	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2	4.5%	3	0.0%	0
Internet / delivered	17.6%	95	16.7%	10	24.2%	16	19.0%	12	17.2%	10	14.3%	11	18.6%	13	18.2%	12	13.8%	11
Home catalogue	1.7%	9	0.0%	0	1.5%	1	4.8%	3	1.7%	1	0.0%	0	0.0%	0	4.5%	3	1.3%	1
TV / Interactive shopping (Don't know / can't remember)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
	8.9%	48	0.0%	0	6.1%	4	4.8%	3	13.8%	8	7.8%	6	11.4%	8	22.7%	15	5.0%	4
Base:		540		60		66		63		58		77		70		66		80

## Bridgend Borough Retail Study for Peter Brett Associates

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q24 Can you tell me where you or your household last made a purchase of domestic appliances, such as washing machines, fridges or cookers?</b>																		
Asda, Colliers Way, Tonypany	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0
Asda, Coychurch Road, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	0.5%	4	0.0%	0	1.0%	1	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Tesco Extra, Green Park, Talbot Green, Pontyclun	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0
Aberkenfig (Valleys Gateway)	0.8%	6	3.0%	3	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	9.8%	78	15.0%	15	11.0%	11	22.0%	22	10.0%	10	11.0%	11	1.0%	1	0.0%	0	8.0%	8
Cardiff City Centre	3.0%	24	1.0%	1	5.0%	5	2.0%	2	3.0%	3	9.0%	9	1.0%	1	2.0%	2	1.0%	1
Llantrisant	1.1%	9	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	3.0%	3	3.0%	3	0.0%	0
Maesteg	1.3%	10	0.0%	0	0.0%	0	7.0%	7	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0
Merthyr Tydfil	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.0%	3	0.0%	0
Neath	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Newport City Centre	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	1.0%	1	0.0%	0	0.0%	0
Pontycymer	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Pontypridd	2.5%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.0%	16	4.0%	4	0.0%	0
Port Talbot	2.1%	17	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	3.0%	3	13.0%	13
Porthcawl	0.9%	7	0.0%	0	6.0%	6	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pyle	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Swansea City Centre	0.6%	5	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	2	2.0%	2
Talbot Green Town Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	1.0%	1	0.0%	0
Treorchy	1.9%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	10.0%	10	0.0%	0
Aberfan Shopping Centre, Port Talbot	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Bridgend Retail Park, Cowbridge Road, Bridgend	15.5%	124	23.0%	23	26.0%	26	10.0%	10	23.0%	23	10.0%	10	2.0%	2	6.0%	6	24.0%	24
Bridgend Shopping Centre, Cheapside, Bridgend	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glamorgan Vale Retail Park, Talbot Green	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Picton Court Retail Park, Waterton, Bridgend	0.3%	2	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Talbot Green Shopping Park	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	3.0%	3	1.0%	1	0.0%	0
Waterton Retail Park, Waterton Road, Bridgend	0.5%	4	0.0%	0	2.0%	2	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Brown Lennox Retail Park, Ynysangharad Road, Pontypridd, CF37 4DA	1.5%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	6.0%	6	5.0%	5	0.0%	0
Cardiff - out of centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Currys PC World, Port Road, Culver House Cross, Cardiff, CF5 6XW	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	1.5%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	10.0%	10	0.0%	0
Enterprise Retail Park, Nantyllyn Road, Llansamlet, Swansea, SA7 9RF	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Ikea, Ferry Road, Cardiff, CF11 0XR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Morfa Shopping Park, Brunel Way, Bon-y-maen, Swansea, SA1 7BP	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Porth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Other, zone 8	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Other, outside area	0.5%	4	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	1.0%	1
Internet / delivered	16.8%	134	14.0%	14	18.0%	18	17.0%	17	15.0%	15	22.0%	22	17.0%	17	15.0%	15	16.0%	16
Home catalogue	0.8%	6	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	3.0%	3	1.0%	1	1.0%	1
TV / Interactive shopping	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	3.5%	28	2.0%	2	7.0%	7	1.0%	1	2.0%	2	4.0%	4	4.0%	4	7.0%	7	1.0%	1
(Don't do this type of shopping)	28.3%	226	38.0%	38	24.0%	24	35.0%	35	37.0%	37	19.0%	19	29.0%	29	18.0%	18	26.0%	26

Column %ges.

# Bridgend Borough Retail Study for Peter Brett Associates

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	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Base:	800	100	100	100	100	100	100	100	100

# Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q25 And the time before that, where you or your household last made a purchase of domestic appliances, such as washing machines, fridges or cookers?</b>																		
<i>Not 'Don't do' or 'Don't know' at Q24</i>																		
Asda, Colliers Way, Tonypany	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	0.2%	1	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	0.7%	4	3.3%	2	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Green Park, Talbot Green, Pontyclun	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	2	1.5%	1	0.0%	0	0.0%	0
Tesco, Brewery Lane, Bridgend	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberkenfig (Valleys Gateway)	0.7%	4	3.3%	2	0.0%	0	1.6%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Barry	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	11.5%	63	20.0%	12	10.1%	7	25.0%	16	18.0%	11	11.7%	9	1.5%	1	0.0%	0	9.6%	7
Caerphilly	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff Bay	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Cardiff City Centre	3.8%	21	3.3%	2	2.9%	2	3.1%	2	4.9%	3	10.4%	8	1.5%	1	1.3%	1	2.7%	2
Llantrisant	1.1%	6	0.0%	0	0.0%	0	0.0%	0	1.6%	1	1.3%	1	3.0%	2	2.7%	2	0.0%	0
Maesteg	0.7%	4	0.0%	0	0.0%	0	6.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merthyr Tydfil	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	2.7%	2	0.0%	0
Neath	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Newport City Centre	0.2%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	3	0.0%	0	0.0%	0	0.0%	0
Pontycymer	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Pontypridd	3.8%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.4%	17	5.3%	4	0.0%	0
Port Talbot	2.9%	16	0.0%	0	1.4%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	4.0%	3	15.1%	11
Porthcawl	0.7%	4	0.0%	0	5.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pyle	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2
Swansea City Centre	1.5%	8	0.0%	0	0.0%	0	4.7%	3	0.0%	0	0.0%	0	0.0%	0	2.7%	2	4.1%	3
Talbot Green Town Centre	1.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	3	0.0%	0	2.7%	2	1.4%	1
Treorchy	2.7%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.0%	6	12.0%	9	0.0%	0
Aberfan Shopping Centre, Port Talbot	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	19.6%	107	38.3%	23	30.4%	21	7.8%	5	29.5%	18	15.6%	12	3.0%	2	6.7%	5	28.8%	21
Bridgend Shopping Centre, Cheapside, Bridgend	0.2%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	0.2%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Picton Court Retail Park, Waterton, Bridgend	0.4%	2	1.7%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Talbot Green Shopping Park	1.5%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	4	6.0%	4	0.0%	0	0.0%	0
Waterton Retail Park, Waterton Road, Bridgend	1.1%	6	0.0%	0	5.8%	4	0.0%	0	1.6%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Brown Lennox Retail Park, Ynysangharad Road, Pontypridd, CF37 4DA	2.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	13.4%	9	2.7%	2	0.0%	0
Cardiff - out of centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Currys PC World, Port Road, Culver House Cross, Cardiff, CF5 6XW	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	3	0.0%	0	0.0%	0	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	2.0%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	12.0%	9	0.0%	0
Enterprise Retail Park, Nantyyffin Road, Llansamlet, Swansea, SA7 9RF	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Morfa Shopping Park, Brunel Way, Bon-y-maen, Swansea, SA1 7BP	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	3
Other, outside area	0.7%	4	1.7%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	1.3%	1	1.4%	1
Internet / delivered	25.6%	140	20.0%	12	31.9%	22	34.4%	22	19.7%	12	29.9%	23	22.4%	15	24.0%	18	21.9%	16
Home catalogue	0.9%	5	0.0%	0	0.0%	0	3.1%	2	1.6%	1	0.0%	0	0.0%	0	2.7%	2	0.0%	0
(Don't know / can't remember)	8.8%	48	6.7%	4	11.6%	8	7.8%	5	13.1%	8	5.2%	4	6.0%	4	13.3%	10	6.8%	5
Base:		546		60		69		64		61		77		67		75		73

# Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q26 Can you tell me where you or your household last made a purchase of health, beauty or chemist items?</b>																		
Aldi, Brackla Street, Bridgend	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Asda, Colliers Way, Tonypany	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.0%	3	1.0%	1	0.0%	0
Asda, Coychurch Road, Bridgend	1.3%	10	5.0%	5	1.0%	1	1.0%	1	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	7
Lidl, High Street, Treorchy	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Sainsbury's, The Derwen, Bridgend	0.4%	3	1.0%	1	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	2.3%	18	8.0%	8	6.0%	6	0.0%	0	2.0%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Green Park, Talbot Green, Pontyclun	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	3.0%	3	0.0%	0	0.0%	0
Tesco, Brewery Lane, Bridgend	0.5%	4	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Castle Street, Maesteg	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Aberkenfig (Valleys Gateway)	0.5%	4	0.0%	0	0.0%	0	1.0%	1	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	14.4%	115	50.0%	50	12.0%	12	11.0%	11	28.0%	28	6.0%	6	1.0%	1	0.0%	0	7.0%	7
Cardiff City Centre	2.8%	22	3.0%	3	3.0%	3	2.0%	2	2.0%	2	5.0%	5	5.0%	5	2.0%	2	0.0%	0
Cowbridge	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	8	0.0%	0	0.0%	0	1.0%	1
Kenfig Hill	2.5%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.0%	20
Lalestan/St Brides	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Llantrisant	1.5%	12	0.0%	0	0.0%	0	0.0%	0	1.0%	1	4.0%	4	6.0%	6	1.0%	1	0.0%	0
Maesteg	5.8%	46	0.0%	0	1.0%	1	43.0%	43	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Margam	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Merthyr Tydfil	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0
Neath	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	1.0%	1
Ogmore Vale	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pencoed	2.8%	22	0.0%	0	0.0%	0	0.0%	0	17.0%	17	4.0%	4	1.0%	1	0.0%	0	0.0%	0
Pontyclun	1.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.0%	10	0.0%	0	0.0%	0	0.0%	0
Pontypridd	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0
Port Talbot	3.3%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	8.0%	8	17.0%	17
Porthcawl	7.4%	59	0.0%	0	47.0%	47	0.0%	0	1.0%	1	1.0%	1	1.0%	1	0.0%	0	9.0%	9
Pyle	0.5%	4	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Swansea City Centre	0.6%	5	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	1.0%	1	2.0%	2
Talbot Green Town Centre	4.0%	32	0.0%	0	0.0%	0	0.0%	0	2.0%	2	25.0%	25	4.0%	4	0.0%	0	1.0%	1
Tondu	0.6%	5	0.0%	0	0.0%	0	2.0%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Tonypany	1.9%	15	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	14.0%	14	0.0%	0	0.0%	0
Tonyrefail	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Treorchy	3.4%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	24.0%	24	0.0%	0
Bridgend Shopping Centre, Cheapside, Bridgend	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glamorgan Vale Retail Park, Talbot Green	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Mcarthurlen Designer Outlet, Derwen, Bridgend	0.4%	3	1.0%	1	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Picton Court Retail Park, Waterton, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Talbot Green Shopping Park	1.5%	12	0.0%	0	0.0%	0	0.0%	0	5.0%	5	5.0%	5	1.0%	1	1.0%	1	0.0%	0
Gelli	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	7	0.0%	0	0.0%	0
Porth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Ton Pentre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Treherbert	2.9%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	22.0%	22	0.0%	0
Other, zone 1	0.4%	3	2.0%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Other, zone 2	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 4	0.4%	3	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0
Other, zone 7	1.6%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.0%	12	1.0%	1
Other, outside area	1.9%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	12.0%	12	0.0%	0	0.0%	0
Internet / delivered	4.3%	34	4.0%	4	7.0%	7	5.0%	5	2.0%	2	2.0%	2	5.0%	5	1.0%	1	8.0%	8
Home catalogue	0.4%	3	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
TV / interactive shopping	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
(Don't know / can't remember)	2.0%	16	0.0%	0	5.0%	5	2.0%	2	1.0%	1	1.0%	1	1.0%	1	4.0%	4	2.0%	2
(Don't do this type of shopping)	18.5%	148	21.0%	21	14.0%	14	30.0%	30	22.0%	22	9.0%	9	20.0%	20	14.0%	14	18.0%	18
Base:		800		100		100		100		100		100		100		100		100

# Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q27 And the time before that, where did you or your household go to make a purchase of health, beauty or chemist items?</b>																		
<i>Not 'Don't do' or 'Don't know' at Q26</i>																		
Aldi, Brackla Street, Bridgend	0.2%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Castle Street, Maesteg	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Asda, Colliers Way, Tonypandy	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	2.5%	2	2.4%	2	0.0%	0
Asda, Coychurch Road, Bridgend	0.8%	5	5.1%	4	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	5
Lidl, Bridgend Retail Park, Bridgend	0.5%	3	0.0%	0	0.0%	0	0.0%	0	2.6%	2	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, High Street, Treorchy	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Sainsbury's, The Derwen, Bridgend	0.8%	5	3.8%	3	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Tesco Extra, Cowbridge Road, Bridgend	2.2%	14	8.9%	7	3.7%	3	0.0%	0	2.6%	2	1.1%	1	0.0%	0	0.0%	0	1.3%	1
Tesco Extra, Green Park, Talbot Green, Pontyclun	1.6%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.9%	8	2.5%	2	0.0%	0	0.0%	0
Tesco, Brewery Lane, Bridgend	0.8%	5	6.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Castle Street, Maesteg	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberkenfig (Valleys Gateway)	0.5%	3	0.0%	0	0.0%	0	1.5%	1	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	16.8%	107	55.7%	44	16.0%	13	14.7%	10	37.7%	29	5.6%	5	0.0%	0	0.0%	0	7.5%	6
Cardiff City Centre	6.8%	43	6.3%	5	8.6%	7	4.4%	3	5.2%	4	15.6%	14	7.6%	6	2.4%	2	2.5%	2
Cowbridge	1.6%	10	1.3%	1	0.0%	0	0.0%	0	0.0%	0	10.0%	9	0.0%	0	0.0%	0	0.0%	0
Kenfig Hill	3.3%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.3%	21
Llantrisant	2.0%	13	0.0%	0	0.0%	0	2.9%	2	3.9%	3	3.3%	3	5.1%	4	1.2%	1	0.0%	0
Maesteg	6.9%	44	0.0%	0	0.0%	0	63.2%	43	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Merthyr Tydfil	0.6%	4	0.0%	0	1.2%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0
Neath	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	3	1.3%	1
Pencoed	3.6%	23	0.0%	0	0.0%	0	0.0%	0	23.4%	18	4.4%	4	1.3%	1	0.0%	0	0.0%	0
Pontyclun	1.6%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.1%	10	0.0%	0	0.0%	0	0.0%	0
Pontypridd	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	4	1.2%	1	0.0%	0
Port Talbot	4.4%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	9.8%	8	23.8%	19
Porthcawl	7.7%	49	0.0%	0	51.9%	42	0.0%	0	1.3%	1	1.1%	1	0.0%	0	0.0%	0	6.3%	5
Pyle	0.6%	4	0.0%	0	1.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	2
Swansea City Centre	0.5%	3	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2
Talbot Green Town Centre	3.5%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.9%	17	3.8%	3	1.2%	1	1.3%	1
Tondu	0.5%	3	0.0%	0	0.0%	0	2.9%	2	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tonypandy	2.2%	14	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	16.5%	13	0.0%	0	0.0%	0
Tonyrefail	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	3	0.0%	0	0.0%	0
Treorchy	5.0%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.1%	8	29.3%	24	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2
Bridgend Shopping Centre, Cheapside, Bridgend	0.3%	2	1.3%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glamorgan Vale Retail Park, Talbot Green	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	3	0.0%	0	0.0%	0	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	0.8%	5	3.8%	3	1.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Picton Court Retail Park, Waterton, Bridgend	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Talbot Green Shopping Park	1.9%	12	0.0%	0	0.0%	0	0.0%	0	6.5%	5	5.6%	5	1.3%	1	1.2%	1	0.0%	0
Gelli	0.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.6%	6	0.0%	0	0.0%	0
Morfa Shopping Park, Brunel Way, Bon-y-maen, Swansea, SA1 7BP	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Porth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0
Ton Pentre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0
Treherbert	3.0%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	22.0%	18	0.0%	0
Other, zone 1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Other, zone 2	0.2%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 4	0.5%	3	0.0%	0	0.0%	0	0.0%	0	3.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0
Other, zone 7	1.7%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.2%	10	1.3%	1
Other, outside area	2.2%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	3	12.7%	10	1.2%	1	0.0%	0
Internet / delivered	5.3%	34	3.8%	3	11.1%	9	4.4%	3	1.3%	1	3.3%	3	6.3%	5	1.2%	1	11.3%	9
Home catalogue	0.2%	1	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
TV / Interactive shopping	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
(Don't know / can't remember)	1.9%	12	2.5%	2	1.2%	1	0.0%	0	1.3%	1	0.0%	0	5.1%	4	4.9%	4	0.0%	0
Base:		636		79		81		68		77		90		79		82		80

# Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q28 Can you tell me where you or your household last made a purchase of recreational goods such as sports equipment, bicycles, musical instruments or toys?</b>																		
Aldi, Brackla Street, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1		
Asda, Colliers Way, Tonypany	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Asda, Coychurch Road, Bridgend	0.3%	2	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Lidl, High Street, Treorchy	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	0.4%	3	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Tesco Extra, Green Park, Talbot Green, Pontyclun	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0
Tesco, Brewery Lane, Bridgend	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberkenfig (Valleys Gateway)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Bridgend Town Centre	5.4%	43	5.0%	5	6.0%	6	7.0%	7	15.0%	15	4.0%	4	3.0%	3	0.0%	0	3.0%	3
Cardiff City Centre	3.1%	25	0.0%	0	5.0%	5	3.0%	3	5.0%	5	4.0%	4	4.0%	4	2.0%	2	2.0%	2
Cowbridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llantrisant	0.6%	5	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	1.0%	1	0.0%	0
Llantwit Major	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maesteg	0.8%	6	0.0%	0	0.0%	0	6.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merthyr Tydfil	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Neath	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Penarth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Pontypridd	0.9%	7	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	5.0%	5	1.0%	1	0.0%	0
Port Talbot	0.9%	7	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	1.0%	1
Porthcawl	0.4%	3	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Pyle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Swansea City Centre	1.6%	13	1.0%	1	0.0%	0	3.0%	3	0.0%	0	1.0%	1	1.0%	1	1.0%	1	6.0%	6
Talbot Green Town Centre	1.5%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.0%	9	1.0%	1	2.0%	2	0.0%	0
Tondu	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tonypany	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1	0.0%	0
Treorchy	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	2.1%	17	6.0%	6	0.0%	0	2.0%	2	1.0%	1	4.0%	4	0.0%	0	0.0%	0	4.0%	4
Glamorgan Vale Retail Park, Talbot Green	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	2.5%	20	3.0%	3	2.0%	2	1.0%	1	5.0%	5	2.0%	2	0.0%	0	2.0%	2	5.0%	5
Talbot Green Shopping Park	1.9%	15	0.0%	0	0.0%	0	0.0%	0	2.0%	2	7.0%	7	5.0%	5	0.0%	0	1.0%	1
Waterton Retail Park, Waterton Road, Bridgend	0.6%	5	0.0%	0	3.0%	3	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Capital Shopping Park, Leckwith Road, Cardiff, CF11 8EG	0.8%	6	0.0%	0	3.0%	3	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Cardiff - out of centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0
Enterprise Retail Park, Nantyffin Road, Llansamlet, Swansea, SA7 9RF	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Porth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Other, outside area	0.5%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0
Internet / delivered	12.4%	99	13.0%	13	20.0%	20	10.0%	10	13.0%	13	12.0%	12	10.0%	10	12.0%	12	9.0%	9
(Don't know / can't remember)	1.6%	13	0.0%	0	4.0%	4	1.0%	1	4.0%	4	0.0%	0	0.0%	0	1.0%	1	3.0%	3
(Don't do this type of shopping)	57.9%	463	68.0%	68	51.0%	51	65.0%	65	47.0%	47	48.0%	48	60.0%	60	64.0%	64	60.0%	60
Base:	800	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100



## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q29 And the time before that, where did you or your household go to make a purchase of recreational goods such as sports equipment, bicycles, musical instruments or toys?</b>																		
<i>Not 'Don't do' or 'Don't know' at Q28</i>																		
Asda, Colliers Way, Tonypany	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	2.9%	1	0.0%	0
Asda, Coychurch Road, Bridgend	0.9%	3	3.1%	1	0.0%	0	0.0%	0	4.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1
Lidl, Broadview, Tondy, Bridgend	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1
Tesco Extra, Cowbridge Road, Bridgend	1.2%	4	3.1%	1	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	2
Tesco Extra, Green Park, Talbot Green, Pontyclun	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	2.9%	1	0.0%	0
Aberkenfig (Valleys Gateway)	0.6%	2	0.0%	0	0.0%	0	0.0%	0	4.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	9.6%	31	12.5%	4	11.1%	5	20.6%	7	18.4%	9	1.9%	1	2.5%	1	0.0%	0	10.8%	4
Cardiff City Centre	9.6%	31	9.4%	3	13.3%	6	8.8%	3	14.3%	7	9.6%	5	7.5%	3	5.7%	2	5.4%	2
Llantrisant	1.9%	6	0.0%	0	0.0%	0	0.0%	0	4.1%	2	1.9%	1	5.0%	2	2.9%	1	0.0%	0
Maesteg	2.8%	9	0.0%	0	0.0%	0	14.7%	5	0.0%	0	0.0%	0	0.0%	0	11.4%	4	0.0%	0
Neath	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.1%	3
Penarth	0.3%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	3	0.0%	0	0.0%	0	0.0%	0
Pontypridd	2.2%	7	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0	12.5%	5	2.9%	1	0.0%	0
Port Talbot	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	2	0.0%	0
Porthcawl	0.6%	2	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0
Swansea City Centre	4.0%	13	0.0%	0	2.2%	1	8.8%	3	2.0%	1	1.9%	1	5.0%	2	0.0%	0	13.5%	5
Talbot Green Town Centre	4.0%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.2%	11	2.5%	1	2.9%	1	0.0%	0
Tondy	0.3%	1	3.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tonypany	1.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.5%	3	2.9%	1	0.0%	0
Treorchy	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	2.9%	1	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	3.7%	12	6.3%	2	2.2%	1	2.9%	1	0.0%	0	7.7%	4	2.5%	1	0.0%	0	8.1%	3
Mcarthurglen Designer Outlet, Derwen, Bridgend	8.3%	27	21.9%	7	4.4%	2	11.8%	4	14.3%	7	1.9%	1	0.0%	0	5.7%	2	10.8%	4
Talbot Green Shopping Park	5.2%	17	0.0%	0	0.0%	0	0.0%	0	6.1%	3	15.4%	8	12.5%	5	0.0%	0	2.7%	1
Waterton Retail Park, Waterton Road, Bridgend	0.9%	3	0.0%	0	4.4%	2	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Capital Shopping Park, Leckwith Road, Cardiff, CF11 8EG	1.9%	6	0.0%	0	6.7%	3	0.0%	0	2.0%	1	3.8%	2	0.0%	0	0.0%	0	0.0%	0
Cardiff - out of centre	0.6%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	1	1.9%	1	0.0%	0	0.0%	0	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	5.7%	2	0.0%	0
Other, outside area	0.9%	3	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	1	2.9%	1	0.0%	0
Internet / delivered	28.7%	93	37.5%	12	42.2%	19	23.5%	8	22.4%	11	23.1%	12	25.0%	10	31.4%	11	27.0%	10
TV / Interactive shopping	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0
(Don't know / can't remember)	4.3%	14	3.1%	1	6.7%	3	2.9%	1	4.1%	2	1.9%	1	7.5%	3	5.7%	2	2.7%	1
Base:		324		32		45		34		49		52		40		35		37

# Bridgend Borough Retail Study for Peter Brett Associates

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q30 And where was the last purchase of other non-food items such as books, CDs, jewellery or china and glass items?</b>																		
Asda, Colliers Way, Tonypany	1.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	7.0%	7	2.0%	2	0.0%	0
Asda, Coychurch Road, Bridgend	1.1%	9	3.0%	3	0.0%	0	1.0%	1	3.0%	3	0.0%	0	1.0%	1	0.0%	0	1.0%	1
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Marks & Spencer Outlet, McArthurGlen Designer Outlet, Bridgend	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	0.8%	6	0.0%	0	3.0%	3	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Tesco Extra, Green Park, Talbot Green, Pontyclun	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	1.0%	1	1.0%	1	0.0%	0
Tesco, Brewery Lane, Bridgend	0.3%	2	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberkenfig (Valleys Gateway)	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre Cardiff Bay	7.5%	60	16.0%	16	3.0%	3	12.0%	12	16.0%	16	2.0%	2	1.0%	1	0.0%	0	10.0%	10
Cardiff City Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1
Cowbridge	5.8%	46	5.0%	5	8.0%	8	6.0%	6	7.0%	7	9.0%	9	6.0%	6	1.0%	1	4.0%	4
Kenfig Hill	1.0%	8	0.0%	0	1.0%	1	0.0%	0	0.0%	0	7.0%	7	0.0%	0	0.0%	0	0.0%	0
Maesteg	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Merthyr Tydfil	1.4%	11	0.0%	0	0.0%	0	9.0%	9	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Neath	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0
Pencoed	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Pontyclun	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Pontypridd	0.4%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Port Talbot	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	1.0%	1	0.0%	0
Porthcawl	1.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	6.0%	6
Pyle	1.3%	10	0.0%	0	10.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea City Centre	0.3%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Talbot Green Town Centre	1.3%	10	2.0%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6
Tonypany	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Treorchy	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	1.4%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	8.0%	8	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Talbot Green Shopping Park	1.9%	15	0.0%	0	1.0%	1	1.0%	1	7.0%	7	1.0%	1	2.0%	2	0.0%	0	3.0%	3
Abroad	0.6%	5	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.0%	2	1.0%	1	1.0%	1	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ikea, Ferry Road, Cardiff, CF11 0XR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Porth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Treherbert	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Other, zone 1	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Other, zone 7	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Other, outside area	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	3.0%	3	0.0%	0
Internet / delivered	23.5%	188	26.0%	26	37.0%	37	18.0%	18	16.0%	16	30.0%	30	26.0%	26	16.0%	16	19.0%	19
Home catalogue	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
(Don't know / can't remember)	2.3%	18	0.0%	0	0.0%	0	6.0%	6	2.0%	2	1.0%	1	2.0%	2	5.0%	5	2.0%	2
(Don't do this type of shopping)	40.1%	321	44.0%	44	33.0%	33	44.0%	44	45.0%	45	33.0%	33	34.0%	34	50.0%	50	38.0%	38
Base:		800		100		100		100		100		100		100		100		100

Column %ges.

# Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q31 And the time before that, where did you or your household go to make a purchase of other non-food items such as books, CDs, jewellery or china and glass items?</b>																		
<i>Not 'Don't do' or 'Don't know' at Q30</i>																		
Asda, Colliers Way, Tonypany	1.5%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	7.8%	5	2.2%	1	0.0%	0
Asda, Coychurch Road, Bridgend	2.2%	10	5.4%	3	0.0%	0	2.0%	1	7.5%	4	0.0%	0	0.0%	0	0.0%	0	3.3%	2
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Lidl, High Street, Treorchy	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	0.7%	3	3.6%	2	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	1.1%	5	1.8%	1	1.5%	1	0.0%	0	5.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Green Park, Talbot Green, Pontyclun	2.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.1%	6	3.1%	2	2.2%	1	0.0%	0
Tesco, Castle Street, Maesteg	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0
Aberkenfig (Valleys Gateway)	0.2%	1	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	13.2%	61	39.3%	22	4.5%	3	20.0%	10	26.4%	14	1.5%	1	1.6%	1	0.0%	0	16.7%	10
Cardiff City Centre	11.1%	51	10.7%	6	17.9%	12	16.0%	8	7.5%	4	16.7%	11	9.4%	6	6.7%	3	1.7%	1
Cowbridge	0.9%	4	1.8%	1	0.0%	0	0.0%	0	0.0%	0	4.5%	3	0.0%	0	0.0%	0	0.0%	0
Kenfig Hill	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Llantrisant	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Maesteg	2.0%	9	0.0%	0	0.0%	0	16.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Merthyr Tydfil	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0
Neath	0.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	2	3.3%	2
Pencoed	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Pontyclun	0.7%	3	0.0%	0	1.5%	1	0.0%	0	0.0%	0	3.0%	2	0.0%	0	0.0%	0	0.0%	0
Pontypridd	1.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.9%	7	2.2%	1	0.0%	0
Port Talbot	2.0%	9	0.0%	0	0.0%	0	4.0%	2	0.0%	0	0.0%	0	0.0%	0	4.4%	2	8.3%	5
Porthcawl	2.0%	9	0.0%	0	13.4%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pyle	0.4%	2	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Swansea City Centre	2.2%	10	1.8%	1	0.0%	0	4.0%	2	0.0%	0	0.0%	0	0.0%	0	2.2%	1	10.0%	6
Talbot Green Town Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.9%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Tonypany	1.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.5%	8	0.0%	0	0.0%	0
Treorchy	1.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	2	13.3%	6	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	3.3%	2
Mcarthurglen Designer Outlet, Derwen, Bridgend	3.0%	14	1.8%	1	3.0%	2	2.0%	1	9.4%	5	1.5%	1	1.6%	1	0.0%	0	5.0%	3
Talbot Green Shopping Park	1.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	4	0.0%	0	2.2%	1	0.0%	0
Abroad	0.2%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Capital Shopping Park, Leckwith Road, Cardiff, CF11 8EG	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Ikea, Ferry Road, Cardiff, CF11 0XR	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Treherbert	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0
Other, zone 1	0.2%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Other, zone 7	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0
Other, outside area	1.3%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	0.0%	0	6.7%	3	1.7%	1
Internet / delivered	38.8%	179	33.9%	19	49.3%	33	34.0%	17	34.0%	18	43.9%	29	37.5%	24	37.8%	17	36.7%	22
Home catalogue	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	2.2%	1	0.0%	0
TV / Interactive shopping	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0
(Don't know / can't remember)	2.6%	12	0.0%	0	3.0%	2	0.0%	0	5.7%	3	3.0%	2	1.6%	1	4.4%	2	3.3%	2
Base:		461		56		67		50		53		66		64		45		60

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q32A When undertaking shopping via the internet, how do you NORMALLY receive the items you have purchased?</b>																		
Delivery to home	64.4%	515	61.0%	61	69.0%	69	68.0%	68	70.0%	70	77.0%	77	56.0%	56	58.0%	58	56.0%	56
Delivery to another address e.g neighbour / work (but not a store or collection point)	0.8%	6	3.0%	3	1.0%	1	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Delivered to store (Click & collect)	2.5%	20	4.0%	4	4.0%	4	0.0%	0	3.0%	3	2.0%	2	4.0%	4	2.0%	2	1.0%	1
Delivered to a collection point (e.g third party newsagent or convenience store etc.)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Other (Don't know / can't remember / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't shop online)	0.8%	6	1.0%	1	0.0%	0	1.0%	1	1.0%	1	1.0%	1	0.0%	0	2.0%	2	0.0%	0
Base:	31.5%	252	31.0%	31	26.0%	26	30.0%	30	26.0%	26	19.0%	19	40.0%	40	38.0%	38	42.0%	42
		800		100		100		100		100		100		100		100		100
<b>Q32B What is your nearest town centre?</b>																		
Aberkenfig (Valleys Gateway)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	38.5%	308	100.0%	100	24.0%	24	19.0%	19	92.0%	92	25.0%	25	5.0%	5	0.0%	0	43.0%	43
Cardiff City Centre	2.5%	20	0.0%	0	1.0%	1	0.0%	0	0.0%	0	15.0%	15	2.0%	2	1.0%	1	1.0%	1
Cowbridge	2.1%	17	0.0%	0	1.0%	1	0.0%	0	0.0%	0	16.0%	16	0.0%	0	0.0%	0	0.0%	0
Llantrisant	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Maesteg	12.0%	96	0.0%	0	0.0%	0	81.0%	81	0.0%	0	0.0%	0	0.0%	0	12.0%	12	3.0%	3
Merthyr Tydfil	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Neath	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Pencoed	0.9%	7	0.0%	0	0.0%	0	0.0%	0	5.0%	5	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Pontyclun	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	8	0.0%	0	0.0%	0	0.0%	0
Pontypridd	3.1%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	8	11.0%	11	6.0%	6	0.0%	0
Port Talbot	6.5%	52	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.0%	15	36.0%	36
Porthcawl	10.8%	86	0.0%	0	72.0%	72	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	12.0%	12
Pyle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Swansea City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Talbot Green Town Centre	4.6%	37	0.0%	0	0.0%	0	0.0%	0	1.0%	1	26.0%	26	9.0%	9	1.0%	1	0.0%	0
Tonypanyd	5.0%	40	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	40.0%	40	0.0%	0	0.0%	0
Tonyrefail	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0
Treorchy	9.6%	77	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.0%	21	56.0%	56	0.0%	0
Aberdare Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Bargoed Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Gelli Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Pentre Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Treherbert Village Centre	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	7	0.0%	0
(Don't know / uncertain)	0.4%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Base:		800		100		100		100		100		100		100		100		100

# Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q32C What things do you think could be improved about that town centre? [MR]</b>																		
<i>Not 'Don't know / uncertain' at Q32B</i>																		
Better signposting within the centre	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheaper parking	7.5%	60	13.0%	13	12.1%	12	4.0%	4	12.0%	12	11.0%	11	5.0%	5	0.0%	0	3.0%	3
Improved access for wheelchair and pushchair users	1.0%	8	1.0%	1	3.0%	3	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2
More accessible car parking	2.9%	23	4.0%	4	4.0%	4	1.0%	1	4.0%	4	2.0%	2	5.0%	5	1.0%	1	2.0%	2
More frequent bus services to the centre	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	1.0%	1	0.0%	0	1.0%	1
More frequent train services	0.5%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	1.0%	1
More parking	12.0%	96	12.0%	12	9.1%	9	4.0%	4	13.0%	13	25.0%	25	15.0%	15	12.1%	12	6.1%	6
More priority for pedestrians	1.3%	10	7.0%	7	1.0%	1	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
More reliable / comfortable bus services	1.1%	9	2.0%	2	1.0%	1	0.0%	0	2.0%	2	1.0%	1	0.0%	0	1.0%	1	2.0%	2
More reliable train services	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More secure parking	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
New / relocated bus stops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better street furniture / floral displays	1.3%	10	2.0%	2	0.0%	0	2.0%	2	2.0%	2	1.0%	1	0.0%	0	1.0%	1	2.0%	2
Cleaner streets / removal of litter	2.3%	18	6.0%	6	1.0%	1	1.0%	1	3.0%	3	3.0%	3	1.0%	1	0.0%	0	3.0%	3
Improve appearance / environment of centre	5.0%	40	5.0%	5	6.1%	6	5.0%	5	6.0%	6	1.0%	1	3.0%	3	2.0%	2	12.1%	12
Improved security measures / more CCTV / more police	0.8%	6	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	1.0%	1	0.0%	0	2.0%	2
More control on alcohol / drinkers / drug users	0.8%	6	5.0%	5	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More control on other anti-social behaviour	1.1%	9	3.0%	3	1.0%	1	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	2.0%	2
More green spaces / areas	0.6%	5	0.0%	0	0.0%	0	2.0%	2	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More shelter from wind / rain	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better choice of shops in general	39.6%	316	52.0%	52	26.3%	26	46.0%	46	55.0%	55	21.0%	21	39.0%	39	29.3%	29	48.5%	48
Better crèche facilities	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better quality of shops	13.7%	109	14.0%	14	9.1%	9	24.0%	24	10.0%	10	7.0%	7	13.0%	13	3.0%	3	29.3%	29
Bigger / better supermarket	3.3%	26	3.0%	3	7.1%	7	4.0%	4	1.0%	1	1.0%	1	4.0%	4	2.0%	2	4.0%	4
Expand the town centre's colleges / expand university	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fewer bars / nightclubs	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improvement to the market	3.5%	28	4.0%	4	1.0%	1	11.0%	11	4.0%	4	3.0%	3	0.0%	0	3.0%	3	2.0%	2
More / better eating places	1.4%	11	2.0%	2	3.0%	3	0.0%	0	1.0%	1	0.0%	0	2.0%	2	1.0%	1	2.0%	2
More / better leisure facilities	3.1%	25	2.0%	2	11.1%	11	2.0%	2	0.0%	0	3.0%	3	3.0%	3	3.0%	3	1.0%	1
More / better pubs / night-life	0.8%	6	1.0%	1	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	2.0%	2
More family oriented facilities	0.9%	7	2.0%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.0%	2	1.0%	1
More independent shops	15.4%	123	11.0%	11	14.1%	14	25.0%	25	18.0%	18	3.0%	3	22.0%	22	5.1%	5	25.3%	25
More national multiple (high street chain) retailers	14.3%	114	16.0%	16	7.1%	7	22.0%	22	24.0%	24	6.0%	6	16.0%	16	6.1%	6	17.2%	17
More secure children's play areas	0.6%	5	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.0%	2	2.0%	2
Provision of more residential accommodation	0.3%	2	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fewer charity shops	3.6%	29	3.0%	3	5.1%	5	4.0%	4	5.0%	5	2.0%	2	1.0%	1	0.0%	0	9.1%	9
More / better public toilets	7.0%	56	3.0%	3	27.3%	27	11.0%	11	2.0%	2	2.0%	2	0.0%	0	2.0%	2	9.1%	9
More clothes shops	2.6%	21	3.0%	3	2.0%	2	3.0%	3	1.0%	1	1.0%	1	4.0%	4	5.1%	5	2.0%	2
More service outlets (banks etc)	2.4%	19	0.0%	0	0.0%	0	2.0%	2	1.0%	1	1.0%	1	10.0%	10	4.0%	4	1.0%	1
Fewer empty shops	0.8%	6	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	2.0%	2
Less traffic congestion	2.6%	21	0.0%	0	1.0%	1	0.0%	0	1.0%	1	4.0%	4	4.0%	4	8.1%	8	3.0%	3
(Don't know)	4.4%	35	6.0%	6	5.1%	5	1.0%	1	1.0%	1	9.0%	9	6.0%	6	5.1%	5	2.0%	2
(None mentioned)	17.2%	137	10.0%	10	10.1%	10	13.0%	13	11.0%	11	24.0%	24	18.0%	18	34.3%	34	17.2%	17
Base:		797		100		99		100		100		100		100		99		99

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q33 In which city, town or out-of-town location does your household spend most money on restaurants &amp; cafes?</b>																		
Aberkenfig (Valleys Gateway)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Barry	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1
Bridgend Town Centre	15.4%	123	44.0%	44	9.0%	9	19.0%	19	27.0%	27	8.0%	8	4.0%	4	2.0%	2	10.0%	10
Caerphilly	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Cardiff Bay	1.0%	8	2.0%	2	1.0%	1	2.0%	2	2.0%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	11.8%	94	10.0%	10	9.0%	9	14.0%	14	14.0%	14	21.0%	21	8.0%	8	7.0%	7	11.0%	11
Cowbridge	3.1%	25	5.0%	5	5.0%	5	0.0%	0	3.0%	3	11.0%	11	1.0%	1	0.0%	0	0.0%	0
Cwmbran	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kenfig Hill	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5
Lalestan/St Brides	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Llantrisant	1.6%	13	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	7.0%	7	4.0%	4	0.0%	0
Maesteg	4.0%	32	0.0%	0	0.0%	0	29.0%	29	1.0%	1	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Margam	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2
Merthyr Tydfil	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0
Neath	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2
Ogmore Vale	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Penarth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Pencoed	1.4%	11	0.0%	0	0.0%	0	0.0%	0	9.0%	9	1.0%	1	0.0%	0	1.0%	1	0.0%	0
Pontyclun	0.8%	6	1.0%	1	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0	0.0%	0
Pontypridd	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	1.0%	1	0.0%	0
Port Talbot	3.8%	30	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	11.0%	11	17.0%	17
Porthcawl	8.3%	66	3.0%	3	43.0%	43	0.0%	0	5.0%	5	1.0%	1	1.0%	1	0.0%	0	13.0%	13
Swansea City Centre	1.0%	8	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	1.0%	1	2.0%	2	2.0%	2
Talbot Green Town Centre	3.1%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.0%	20	4.0%	4	1.0%	1	0.0%	0
Tonypanyd	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0	0.0%	0
Tonyrefail	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Treorchy	3.5%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	23.0%	23	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	1.9%	15	1.0%	1	3.0%	3	3.0%	3	4.0%	4	0.0%	0	1.0%	1	1.0%	1	2.0%	2
Talbot Green Shopping Park	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	5.0%	5	0.0%	0	0.0%	0
Treherbert	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0
Other	3.6%	29	2.0%	2	3.0%	3	0.0%	0	0.0%	0	5.0%	5	12.0%	12	5.0%	5	2.0%	2
(Don't know / varies)	5.5%	44	4.0%	4	4.0%	4	5.0%	5	6.0%	6	5.0%	5	7.0%	7	10.0%	10	3.0%	3
(Don't do this activity)	24.8%	198	28.0%	28	22.0%	22	22.0%	22	27.0%	27	17.0%	17	32.0%	32	22.0%	22	28.0%	28
Base:		800		100		100		100		100		100		100		100		100

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q34 In which city, town or out-of-town location does your household spend most money on pubs / bars / nightclubs / music venues?</b>																		
Aberkenfig (Valleys Gateway)	0.8%	6	1.0%	1	0.0%	0	0.0%	0	3.0%	3	0.0%	0	1.0%	1	0.0%	0	1.0%	1
Barry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Bridgend Town Centre	8.4%	67	30.0%	30	1.0%	1	9.0%	9	15.0%	15	3.0%	3	0.0%	0	1.0%	1	8.0%	8
Caerphilly	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Cardiff Bay	0.5%	4	0.0%	0	0.0%	0	1.0%	1	1.0%	1	1.0%	1	0.0%	0	0.0%	0	1.0%	1
Cardiff City Centre	7.0%	56	5.0%	5	5.0%	5	13.0%	13	9.0%	9	10.0%	10	8.0%	8	4.0%	4	2.0%	2
Cowbridge	1.4%	11	1.0%	1	0.0%	0	0.0%	0	2.0%	2	8.0%	8	0.0%	0	0.0%	0	0.0%	0
Cwmbran	0.4%	3	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Kenfig Hill	1.4%	11	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	10.0%	10
Llantrisant	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	1.0%	1	0.0%	0	0.0%	0
Maesteg	3.4%	27	0.0%	0	0.0%	0	24.0%	24	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0
Margam	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Merthyr Tydfil	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Neath	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Ogmore Vale	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pencoed	1.3%	10	0.0%	0	0.0%	0	1.0%	1	8.0%	8	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Pontyclun	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0
Pontypridd	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0
Port Talbot	1.4%	11	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	2	8.0%	8
Porthcawl	6.4%	51	0.0%	0	39.0%	39	0.0%	0	3.0%	3	1.0%	1	0.0%	0	0.0%	0	8.0%	8
Pyle	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Swansea City Centre	0.6%	5	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	1.0%	1	1.0%	1
Talbot Green Town Centre	1.0%	8	0.0%	0	0.0%	0	0.0%	0	1.0%	1	6.0%	6	1.0%	1	0.0%	0	0.0%	0
Tondu	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Tonypanyd	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	1.0%	1	0.0%	0
Treorchy	2.1%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	13.0%	13	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Treherbert	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	5.0%	5	0.0%	0
Other	5.1%	41	4.0%	4	7.0%	7	1.0%	1	1.0%	1	11.0%	11	8.0%	8	7.0%	7	2.0%	2
(Don't know / varies)	3.3%	26	3.0%	3	3.0%	3	4.0%	4	2.0%	2	3.0%	3	7.0%	7	3.0%	3	1.0%	1
(Don't do this activity)	51.8%	414	55.0%	55	45.0%	45	44.0%	44	51.0%	51	48.0%	48	60.0%	60	57.0%	57	54.0%	54
Base:		800		100		100		100		100		100		100		100		100

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q35 Where does your household spend most money on the cinema / theatre?</b>																		
Cineworld, Cardiff	2.0%	16	4.0%	4	1.0%	1	2.0%	2	1.0%	1	5.0%	5	2.0%	2	0.0%	0	1.0%	1
Coliseum Theatre, Aberdare	0.3%	2	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Grand Pavilion, Porthcawl	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gwyn Hall, Neath	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
New Theatre, Cardiff	1.6%	13	2.0%	2	2.0%	2	1.0%	1	1.0%	1	3.0%	3	3.0%	3	0.0%	0	1.0%	1
ODEON, Cardiff Bay	0.9%	7	0.0%	0	0.0%	0	0.0%	0	1.0%	1	6.0%	6	0.0%	0	0.0%	0	0.0%	0
ODEON, Designer Outlet Village, Bridgend	30.0%	240	47.0%	47	52.0%	52	37.0%	37	45.0%	45	24.0%	24	8.0%	8	6.0%	6	21.0%	21
Park & Dare Theatre, Treorchy	3.1%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	19.0%	19	0.0%	0
Premiere Cinema, Cardiff	0.3%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Reel Cinema, Port Talbot	2.5%	20	0.0%	0	4.0%	4	4.0%	4	0.0%	0	0.0%	0	0.0%	0	6.0%	6	6.0%	6
Sherman Theatre, Cardiff	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Showcase Cinema, Nantgarw	4.3%	34	0.0%	0	0.0%	0	0.0%	0	1.0%	1	12.0%	12	16.0%	16	5.0%	5	0.0%	0
Swansea Grand Theatre	0.4%	3	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1
The Phoenix, Ton Pentre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
The Princess Royal Theatre, Port Talbot	0.6%	5	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1
Vue Cinema, Cardiff	2.0%	16	1.0%	1	1.0%	1	0.0%	0	3.0%	3	9.0%	9	2.0%	2	0.0%	0	0.0%	0
Vue Cinema, Merthyr	1.5%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	9.0%	9	1.0%	1
Vue Cinema, Swansea	1.0%	8	1.0%	1	0.0%	0	1.0%	1	2.0%	2	1.0%	1	0.0%	0	1.0%	1	2.0%	2
Wales Millennium Centre, Cardiff	3.4%	27	2.0%	2	2.0%	2	5.0%	5	1.0%	1	10.0%	10	2.0%	2	1.0%	1	4.0%	4
Cardiff City Centre	0.3%	2	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maesteg Town Hall, Talbot Street, Maesteg	0.4%	3	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Reel Cinema, Hollywood Park, The Princess Margaret Way, Port Talbot	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
St David's Hall, The Hayes, Cardiff	0.5%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	1.0%	1
Taliesin Arts Centre, Sketty, Swansea	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Red Dragon Centre, Hemingway Road, Cardiff	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
(Don't know / varies)	1.1%	9	0.0%	0	0.0%	0	3.0%	3	2.0%	2	1.0%	1	1.0%	1	1.0%	1	1.0%	1
(Don't do this activity)	43.0%	344	41.0%	41	35.0%	35	41.0%	41	40.0%	40	25.0%	25	55.0%	55	49.0%	49	58.0%	58
Base:		800		100		100		100		100		100		100		100		100



## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q36 In which city, town or out-of-town location does your household spend most money on health &amp; fitness?</b>																		
Energie Fitness, Brackla Shopping Centre, Bridgend	0.8%	6	3.0%	3	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
First Class, Kestrel Close, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GYM4LESS, Litchard Industrial Estate, Bridgend	0.3%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Halo Bridgend Life Centre, Bridgend	2.1%	17	5.0%	5	2.0%	2	1.0%	1	7.0%	7	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Halo Garw Valley Life Centre, Pontycymer	0.3%	2	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halo Ogmor Valley Life Centre, Ogmor Vale	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Halo Pencoed Swimming Pool, Pencoed	1.0%	8	0.0%	0	0.0%	0	1.0%	1	6.0%	6	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Halo Pyle Swimming Pool, Pyle, Kenfig Hill	1.6%	13	0.0%	0	6.0%	6	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	6.0%	6
K 2 Gym, Main Ave, Bridgend	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nuffield Health Fitness & Wellbeing Gym, Waterton Rd, Bridgend	2.3%	18	7.0%	7	7.0%	7	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0	1.0%	1
Physique Health & Leisure, Brackla, Bridgend	0.6%	5	3.0%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Porthcawl Health & Fitness, Porthcawl	0.6%	5	1.0%	1	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Snap Fitness, Bridgend	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Xtreme Physique, Pyle, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Halo, Old Forge Site, Nant-y-Crynwydd, Maesteg	2.1%	17	0.0%	0	0.0%	0	15.0%	15	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Port Talbot	1.0%	8	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	2	3.0%	3
Rhondda Sports Centre, Tyntla Road, Geligaled Park, Pentre	2.5%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.0%	13	7.0%	7	0.0%	0
Other	4.6%	37	1.0%	1	6.0%	6	2.0%	2	6.0%	6	17.0%	17	4.0%	4	1.0%	1	0.0%	0
(Don't know / varies)	3.0%	24	6.0%	6	3.0%	3	1.0%	1	3.0%	3	3.0%	3	5.0%	5	2.0%	2	1.0%	1
(Don't do this activity)	76.4%	611	72.0%	72	73.0%	73	75.0%	75	70.0%	70	74.0%	74	78.0%	78	86.0%	86	83.0%	83
Base:		800		100		100		100		100		100		100		100		100

<b>Q37 In which city, town, or out-of-town location does your household spend most money on bingo / casinos?</b>																		
Castle Bingo, Bridgend	4.4%	35	8.0%	8	3.0%	3	5.0%	5	9.0%	9	2.0%	2	2.0%	2	0.0%	0	6.0%	6
Castle Bingo, Canton, Cardiff	0.3%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Castle Bingo, Morriston, Swansea	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Castle Bingo, Nantgarw	1.8%	14	0.0%	0	0.0%	0	1.0%	1	0.0%	0	3.0%	3	6.0%	6	4.0%	4	0.0%	0
Castle Bingo, Neath	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	1.0%	1
Grosvenor Casino, Cardiff	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Judges Bingo, Tonypany	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0
Les Croupiers Casino, Cardiff	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mecca Bingo, Camarthen Road, Swansea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Blaengwynfi Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Cardiff City Centre	0.3%	2	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Croeserw Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Ogmor Vale Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pencoed Social Club, Hendre Road, Pencoed, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
The Royal British Legion, Pyle Road, Pyle, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
United Services Club, New Road, Porthcawl	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.5%	4	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
(Don't do this activity)	90.9%	727	91.0%	91	95.0%	95	89.0%	89	89.0%	89	93.0%	93	90.0%	90	90.0%	90	90.0%	90
Base:		800		100		100		100		100		100		100		100		100

# Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q38 In which city, town, or out-of-town location does your household spend most money on family entertainment or recreation? (i.e. ten pin bowling, ice skating, children's play centres, museums, visitor attractions etc.)</b>																		
Bridgend Town Centre	2.0%	16	5.0%	5	2.0%	2	2.0%	2	4.0%	4	1.0%	1	1.0%	1	0.0%	0	1.0%	1
Cardiff Bay	1.6%	13	2.0%	2	3.0%	3	0.0%	0	1.0%	1	5.0%	5	1.0%	1	0.0%	0	1.0%	1
Cardiff City Centre	9.5%	76	9.0%	9	14.0%	14	16.0%	16	8.0%	8	15.0%	15	5.0%	5	5.0%	5	4.0%	4
Cowbridge	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Llantrisant	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Maesteg	0.3%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Pontyclun	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0
Port Talbot	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2
Porthcawl	0.8%	6	0.0%	0	2.0%	2	1.0%	1	2.0%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Swansea City Centre	1.5%	12	0.0%	0	3.0%	3	5.0%	5	0.0%	0	0.0%	0	0.0%	0	2.0%	2	2.0%	2
Talbot Green Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tonypandy	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0
Tonyrefail	0.6%	5	1.0%	1	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1	1.0%	1	0.0%	0
Treorchy	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Treherbert	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Other	1.5%	12	0.0%	0	1.0%	1	0.0%	0	1.0%	1	2.0%	2	8.0%	8	0.0%	0	0.0%	0
(Don't know / varies)	1.5%	12	0.0%	0	1.0%	1	1.0%	1	0.0%	0	2.0%	2	3.0%	3	3.0%	3	2.0%	2
(Don't do this activity)	78.5%	628	83.0%	83	72.0%	72	74.0%	74	82.0%	82	70.0%	70	75.0%	75	84.0%	84	88.0%	88
Base:		800		100		100		100		100		100		100		100		100
<b>GEN Gender of respondent:</b>																		
Male	34.0%	272	39.0%	39	39.0%	39	38.0%	38	28.0%	28	30.0%	30	31.0%	31	28.0%	28	39.0%	39
Female	66.0%	528	61.0%	61	61.0%	61	62.0%	62	72.0%	72	70.0%	70	69.0%	69	72.0%	72	61.0%	61
Base:		800		100		100		100		100		100		100		100		100
<b>AGE Could I ask how old you are please?</b>																		
18 to 24	1.6%	13	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1	2.0%	2	1.0%	1	7.0%	7
25 to 34	2.6%	21	3.0%	3	3.0%	3	3.0%	3	3.0%	3	2.0%	2	2.0%	2	1.0%	1	4.0%	4
35 to 44	8.5%	68	11.0%	11	10.0%	10	13.0%	13	11.0%	11	9.0%	9	4.0%	4	6.0%	6	4.0%	4
45 to 54	26.6%	213	36.0%	36	25.0%	25	36.0%	36	31.0%	31	30.0%	30	26.0%	26	10.0%	10	19.0%	19
55 to 64	18.3%	146	19.0%	19	15.0%	15	13.0%	13	17.0%	17	20.0%	20	23.0%	23	25.0%	25	14.0%	14
65 +	42.4%	339	30.0%	30	47.0%	47	34.0%	34	38.0%	38	38.0%	38	43.0%	43	57.0%	57	52.0%	52
(Refused)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Base:		800		100		100		100		100		100		100		100		100
<b>QUOTA Zone:</b>																		
Zone 1	12.5%	100	100.0%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2	12.5%	100	0.0%	0	100.0%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3	12.5%	100	0.0%	0	0.0%	0	100.0%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 4	12.5%	100	0.0%	0	0.0%	0	0.0%	0	100.0%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 5	12.5%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	100	0.0%	0	0.0%	0	0.0%	0
Zone 6	12.5%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	100	0.0%	0	0.0%	0
Zone 7	12.5%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	100	0.0%	0
Zone 8	12.5%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	100
Base:		800		100		100		100		100		100		100		100		100

# Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
<b>PC Postcode sector:</b>									
CF31 1	2.4%	19 19.0%	19 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
CF31 2	2.9%	23 23.0%	23 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
CF31 3	1.5%	12 12.0%	12 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
CF31 4	2.8%	22 22.0%	22 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
CF31 5	3.0%	24 24.0%	24 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
CF32 0	1.9%	15 0.0%	0 15.0%	15 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
CF32 7	1.0%	8 0.0%	0 0.0%	0 0.0%	0 8.0%	8 0.0%	0 0.0%	0 0.0%	0 0.0%
CF32 8	2.1%	17 0.0%	0 0.0%	0 17.0%	17 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
CF32 9	3.5%	28 0.0%	0 0.0%	0 0.0%	0 28.0%	28 0.0%	0 0.0%	0 0.0%	0 0.0%
CF33 4	1.5%	12 0.0%	0 12.0%	12 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
CF33 6	7.5%	60 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 60.0%
CF34 0	3.8%	30 0.0%	0 0.0%	0 30.0%	30 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
CF34 9	6.6%	53 0.0%	0 0.0%	0 53.0%	53 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
CF35 5	1.3%	10 0.0%	0 0.0%	0 0.0%	0 0.0%	0 10.0%	10 0.0%	0 0.0%	0 0.0%
CF35 6	8.0%	64 0.0%	0 0.0%	0 0.0%	0 64.0%	64 0.0%	0 0.0%	0 0.0%	0 0.0%
CF36 3	4.5%	36 0.0%	0 36.0%	36 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
CF36 5	4.6%	37 0.0%	0 37.0%	37 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
CF39 8	3.1%	25 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 25.0%	25 0.0%	0 0.0%
CF40 1	0.8%	6 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 6.0%	6 0.0%	0 0.0%
CF40 2	2.4%	19 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 19.0%	19 0.0%	0 0.0%
CF41 7	6.3%	50 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 50.0%	50 0.0%	0 0.0%
CF42 5	5.4%	43 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 43.0%	43 0.0%	0 0.0%
CF42 6	3.6%	29 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 29.0%	29 0.0%	0 0.0%
CF71 7	2.6%	21 0.0%	0 0.0%	0 0.0%	0 0.0%	0 21.0%	21 0.0%	0 0.0%	0 0.0%
CF72 8	5.6%	45 0.0%	0 0.0%	0 0.0%	0 0.0%	0 45.0%	45 0.0%	0 0.0%	0 0.0%
CF72 9	3.0%	24 0.0%	0 0.0%	0 0.0%	0 0.0%	0 24.0%	24 0.0%	0 0.0%	0 0.0%
SA13 2	5.0%	40 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 40.0%	40 0.0%
SA13 3	3.5%	28 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 28.0%	28 0.0%	0 0.0%
Base:	800	100	100	100	100	100	100	100	100

## Appendix 2:

Data Tabulations

By Zone

(Weighted)

# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q01 Where did your household last undertake a main food and grocery purchase?</b>																		
Aldi, Brackla Street, Bridgend	4.2%	34	7.7%	11	2.1%	2	2.0%	2	10.3%	9	5.2%	7	0.0%	0	0.0%	0	6.1%	3
Aldi, Glamorgan Vale Retail Park, Llantrisant	1.7%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.7%	11	1.4%	2	0.0%	0	1.4%	1
Aldi, Llynfi Road, Maesteg	3.8%	30	0.0%	0	0.0%	0	27.9%	25	0.7%	1	0.0%	0	0.0%	0	7.4%	4	0.0%	0
Asda, Castle Street, Maesteg	1.1%	9	0.0%	0	0.0%	0	7.9%	7	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0
Asda, Colliers Way, Tonypany	7.8%	63	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	34.7%	51	17.7%	11	0.0%	0
Asda, Coychurch Road, Bridgend	6.0%	48	18.4%	26	5.4%	5	1.1%	1	16.8%	15	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	4.0%	32	0.0%	0	13.7%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	38.9%	20
Co-op, 3-7 Cowbridge Road, Brynsadler, Pontyclun	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, 57 High Street, Cowbridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, 6 Southgate Avenue, Llantrisant, Pontyclun	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, 75 Tylacelyn Road, Penygraig, Tonypany	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Co-op, Lias Road, Porthcawl	1.5%	12	0.0%	0	12.8%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, New Road, Porthcawl	0.4%	3	0.0%	0	2.8%	3	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Penybont Road, Pencoed, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Station Road, Treorchy	1.7%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	8	8.7%	5	0.0%	0
Co-op, The Triangle, Canolfan, Brackla	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Brackla Street Shopping Centre, Bridgend	1.0%	8	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	5.1%	7	0.0%	0	0.0%	0
Iceland, Dunraven Street, Tonypany	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3	0.0%	0	0.0%	0
Iceland, High Street, Treorchy	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	8.0%	5	0.0%	0
Iceland, Llynfi Road, Maesteg	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Bridgend Retail Park, Bridgend	3.2%	25	5.0%	7	6.6%	6	1.9%	2	5.1%	5	3.4%	4	0.7%	1	0.0%	0	1.1%	1
Lidl, Broadview, Tondu, Bridgend	2.5%	20	1.2%	2	0.0%	0	3.6%	3	16.2%	15	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Lidl, High Street, Treorchy	3.0%	24	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	7.6%	11	19.8%	12	0.6%	0
Marks & Spencer, Talbot Green Retail Park, Pontyclun	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	4.9%	39	5.7%	8	7.4%	7	5.4%	5	10.9%	10	4.9%	6	1.1%	2	0.0%	0	3.6%	2
Tesco Express, Cowbridge Road, Pontyclun	0.7%	6	1.8%	3	0.0%	0	0.6%	1	1.0%	1	0.7%	1	0.6%	1	0.0%	0	0.0%	0
Tesco Express, Coychurch Road, Pencoed, Bridgend	0.6%	5	0.0%	0	0.0%	0	0.0%	0	3.3%	3	1.7%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Express, High Street, Cowbridge	1.3%	10	4.6%	7	0.0%	0	0.0%	0	0.0%	0	2.9%	4	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	11.0%	88	24.1%	34	26.3%	24	2.0%	2	12.2%	11	10.6%	14	0.0%	0	0.0%	0	6.4%	3
Tesco Extra, Green Park, Talbot Green, Pontyclun	7.1%	57	0.0%	0	0.6%	1	0.0%	0	0.6%	1	31.8%	41	7.5%	11	6.1%	4	0.5%	0
Tesco, Brewery Lane, Bridgend	7.8%	62	22.5%	32	9.9%	9	4.5%	4	10.2%	9	0.0%	0	5.1%	7	0.0%	0	0.9%	0
Tesco, Castle Street, Maesteg	4.6%	37	0.0%	0	0.0%	0	31.3%	28	0.7%	1	0.0%	0	0.0%	0	9.5%	6	4.5%	2
Waitrose, Birds Lane, Cowbridge	1.5%	12	2.6%	4	1.9%	2	0.0%	0	0.0%	0	5.0%	6	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caerphilly	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Cardiff Bay	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0
Llantrisant	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merthyr Tydfil	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3	1.9%	1	0.0%	0
Pontyclun	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3	0.0%	0	0.0%	0	0.0%	0

Column %ges.

# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
Pontypridd	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0
Port Talbot	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Porthcawl	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Talbot Green Shopping Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tonypandy	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3	0.0%	0	0.0%	0
Aldi, Commercial Road, Port Talbot	2.0%	16	0.0%	0	3.0%	3	0.0%	0	0.0%	0	3.0%	4	2.0%	3	1.8%	1	11.1%	6
Tesco, Prior Street, Port Talbot	2.0%	16	0.0%	0	0.0%	0	4.6%	4	0.0%	0	4.9%	6	0.0%	0	4.1%	2	5.9%	3
Lidl, Baglan Way Retail Park, Afan Way, Port Talbot,	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	1.7%	1
Morrisons, Baglan Industrial Park, Christchurch Road, Port Talbot	1.1%	9	2.0%	3	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.6%	1	1.9%	1	4.5%	2
Aldi, Cymmer Road, Porth, CF39 9BQ	1.2%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	8	1.8%	1	0.0%	0
Cardiff - out of centre	1.4%	11	0.0%	0	1.7%	2	1.0%	1	0.0%	0	4.7%	6	1.5%	2	1.2%	1	0.0%	0
Lidl, Cymmer Road, Porth, CF39 9BL	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	6	0.0%	0	0.0%	0
Morrisons, Pontypridd Road, Porth, CF39 9PH	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	4	0.7%	0	0.0%	0
Spar, Bute Street, Treherbert, Treorchy, CF42 5NR	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Other, zone 4	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Other, outside area	1.2%	9	0.0%	0	0.6%	1	0.7%	1	0.0%	0	1.7%	2	4.1%	6	0.0%	0	0.0%	0
Internet / delivered	3.1%	25	0.0%	0	4.0%	4	1.2%	1	4.6%	4	5.3%	7	1.4%	2	4.9%	3	8.2%	4
(Don't know / can't remember)	0.9%	7	3.2%	4	0.6%	1	0.7%	1	0.6%	1	0.0%	0	0.0%	0	0.8%	0	0.5%	0
Weighted base:	800	142		92	90	90		90		128		148		60		51		
Sample:	800	100		100	100	100		100		100		100		100		100		

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q02 And where did you shop the time before that (was it the same, or different, and if so, please specify)?</b>																		
<i>Not 'Don't do' or 'Don't know' at Q01</i>																		
Aldi, Brackla Street, Bridgend	3.7%	30	9.2%	13	2.0%	2	2.0%	2	6.8%	6	2.7%	3	0.7%	1	0.0%	0	5.7%	3
Aldi, Glamorgan Vale Retail Park, Llantrisant	2.3%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	8	6.4%	9	0.0%	0	1.4%	1
Aldi, Llynfi Road, Maesteg	2.4%	19	0.0%	0	0.0%	0	18.5%	17	0.7%	1	0.0%	0	0.0%	0	2.1%	1	0.5%	0
Asda, Castle Street, Maesteg	1.8%	15	0.0%	0	0.0%	0	13.0%	12	0.0%	0	0.0%	0	1.1%	2	2.4%	1	0.0%	0
Asda, Colliers Way, Tonypany	6.8%	54	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	29.9%	44	15.0%	9	0.0%	0
Asda, Coychurch Road, Bridgend	8.7%	69	24.3%	33	5.3%	5	3.7%	3	26.4%	24	1.2%	2	1.1%	2	0.0%	0	1.5%	1
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	3.8%	30	0.7%	1	14.4%	13	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	29.3%	15
Co-op, 6 Southgate Avenue, Llantrisant, Pontyclun	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, 75 Tylacelyn Road, Penygraig, Tonypany	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Co-op, Bridgend Road, Bryncae, Pontyclun	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Lias Road, Porthcawl	1.2%	10	0.0%	0	10.4%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Co-op, New Road, Porthcawl	0.5%	4	0.0%	0	4.1%	4	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Penrhwiwer Road, Tonyrefail, Porth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Co-op, Penybont Road, Pencoed, Bridgend	0.4%	3	0.7%	1	0.0%	0	0.0%	0	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Station Road, Treorchy	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	8.3%	5	0.0%	0
Co-op, The Triangle, Canolfan, Brackla	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Bracklea Street Shopping Centre, Bridgend	1.0%	8	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	5.1%	7	0.0%	0	0.0%	0
Iceland, Dunraven Street, Tonypany	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	6	0.0%	0	0.0%	0
Iceland, High Street, Treorchy	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	5.0%	3	0.0%	0
Iceland, Llynfi Road, Maesteg	1.2%	10	0.0%	0	0.0%	0	10.4%	9	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Lidl, Bridgend Retail Park, Bridgend	5.3%	42	12.6%	17	9.4%	9	1.9%	2	2.1%	2	9.3%	12	0.0%	0	0.0%	0	1.9%	1
Lidl, Broadview, Tondu, Bridgend	3.5%	27	0.6%	1	1.1%	1	4.8%	4	14.1%	13	4.9%	6	0.6%	1	0.0%	0	3.0%	2
Lidl, High Street, Treorchy	4.0%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.5%	17	24.4%	15	0.6%	0
Marks & Spencer, Talbot Green Retail Park, Pontyclun	0.4%	3	0.0%	0	0.0%	0	0.7%	1	0.0%	0	1.2%	2	0.6%	1	0.0%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	5.6%	44	8.7%	12	12.4%	11	1.2%	1	14.8%	13	2.7%	3	0.0%	0	0.0%	0	6.3%	3
Tesco Express, Cowbridge Road, Pontyclun	0.4%	4	0.7%	1	2.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Coychurch Road, Pencoed, Bridgend	0.9%	7	0.7%	1	0.0%	0	1.0%	1	3.0%	3	2.1%	3	0.0%	0	0.0%	0	0.0%	0
Tesco Express, District Centre Broadlands, Bridgend	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, High Street, Cowbridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	8.6%	68	14.9%	20	22.2%	20	5.2%	5	10.1%	9	6.1%	8	0.0%	0	0.0%	0	11.3%	6
Tesco Extra, Green Park, Talbot Green, Pontyclun	5.6%	45	0.0%	0	0.0%	0	0.0%	0	1.2%	1	25.4%	33	6.1%	9	3.0%	2	0.5%	0
Tesco, Brewery Lane, Bridgend	3.8%	30	14.3%	20	3.4%	3	1.9%	2	4.3%	4	0.0%	0	1.1%	2	0.0%	0	0.9%	0
Tesco, Castle Street, Maesteg	4.0%	32	0.0%	0	0.0%	0	26.3%	23	0.7%	1	0.0%	0	0.0%	0	12.6%	8	0.5%	0
Waitrose, Birds Lane, Cowbridge	2.6%	20	7.4%	10	1.4%	1	0.0%	0	0.0%	0	6.9%	9	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caerphilly	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
Cardiff City Centre	0.2%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowbridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Llantrisant	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maesteg	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Merthyr Tydfil	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	2.0%	1	0.0%	0
Pontyclun	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3	0.0%	0	0.0%	0	0.0%	0
Pontypridd	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.8%	0	0.0%	0
Port Talbot	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.5%	0
Porthcawl	0.2%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Talbot Green Shopping Centre	0.3%	2	0.0%	0	0.0%	0	0.6%	1	1.0%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Talbot Green Town Centre	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tonypanydy	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	4	0.0%	0	0.0%	0
Aldi, Commercial Road, Port Talbot	3.4%	27	0.0%	0	2.0%	2	0.0%	0	0.0%	0	10.3%	13	1.4%	2	3.0%	2	17.0%	9
Tesco, Prior Street, Port Talbot	1.1%	9	0.0%	0	0.0%	0	4.6%	4	0.0%	0	0.0%	0	0.0%	0	4.8%	3	3.4%	2
Picton Court Retail Park, Waterton, Bridgend	0.5%	4	1.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.1%	2	0.0%	0	0.0%	0
Lidl, Baglan Way Retail Park, Afan Way, Port Talbot,	0.3%	2	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	1.1%	1
Morrisons, Baglan Industrial Park, Christchurch Road, Port Talbot	1.1%	9	2.0%	3	0.0%	0	0.0%	0	0.0%	0	1.3%	2	1.1%	2	2.1%	1	2.9%	1
Aldi, Cymmer Road, Porth, CF39 9BQ	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	6	2.5%	1	0.0%	0
Cardiff - out of centre	1.3%	10	1.0%	1	1.8%	2	0.0%	0	0.0%	0	4.5%	6	0.0%	0	2.0%	1	0.0%	0
Lidl, Cymmer Road, Porth, CF39 9BL	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	5	0.0%	0	0.0%	0
Morrisons, Pontypridd Road, Porth, CF39 9PH	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4	1.4%	1	0.0%	0
Spar, Bute Street, Treherbert, Treorchy, CF42 5NR	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Other, zone 2	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Other, outside area	1.5%	12	0.0%	0	0.6%	1	0.0%	0	0.7%	1	2.7%	3	4.0%	6	2.3%	1	0.0%	0
Internet / delivered	3.6%	28	0.0%	0	2.2%	2	0.6%	1	7.5%	7	5.3%	7	4.3%	6	3.5%	2	7.7%	4
(Don't know / can't remember)	0.6%	5	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.7%	3	0.0%	0	1.6%	1
Weighted base:		793		138		91		89		89		128		148		60		50
Sample:		792		97		99		99		99		100		100		99		99

**Q03 What form of transport do you use to visit your main food shopping destination?***Not 'Don't do' or 'Don't know' or 'Internet' at Q01*

Car - Driver	76.6%	589	80.3%	110	83.2%	73	80.4%	71	88.4%	75	82.0%	100	68.3%	99	51.0%	29	68.3%	32
Car - Passenger	11.5%	88	8.8%	12	8.7%	8	5.0%	4	7.8%	7	11.4%	14	15.2%	22	28.0%	16	12.1%	6
Bus	5.2%	40	2.6%	4	1.3%	1	5.1%	5	2.5%	2	1.3%	2	11.8%	17	8.1%	5	11.6%	5
Cycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Disabled vehicle (e.g. mobility scooter)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0
Taxi	0.9%	7	0.6%	1	0.0%	0	2.6%	2	0.0%	0	0.6%	1	1.7%	3	0.0%	0	0.5%	0
Train	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Walk	3.7%	29	3.0%	4	6.8%	6	6.9%	6	0.6%	1	3.2%	4	1.3%	2	5.2%	3	6.8%	3
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.8%	14	4.7%	7	0.0%	0	0.0%	0	0.6%	1	1.4%	2	0.6%	1	6.4%	4	0.6%	0
Weighted base:		768		138		88		88		85		121		146		57		46
Sample:		759		97		95		97		92		95		98		94		91



	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q04 When your household undertakes its main food and grocery spend (STORE MENTIONED AT Q01) does it visit other shops, leisure or service outlets on the same shopping trips? And if so which ones? [MR]</b>																		
<i>Not 'Don't do' or 'Don't know' or 'Internet' at Q01</i>																		
Yes - other food shops	11.3%	87	5.7%	8	18.9%	17	12.6%	11	7.2%	6	9.9%	12	11.8%	17	18.6%	11	12.3%	6
Yes - other non food shops (clothing, footwear, electrical etc)	15.3%	117	10.7%	15	20.5%	18	7.5%	7	10.7%	9	26.5%	32	11.9%	17	23.4%	13	13.6%	6
Yes - pubs, restaurants or cafes	4.2%	32	2.7%	4	4.7%	4	5.7%	5	6.7%	6	1.9%	2	4.4%	6	3.9%	2	6.0%	3
Yes - financial service (i.e. bank, building society)	1.8%	14	2.3%	3	2.5%	2	0.7%	1	5.1%	4	1.1%	1	0.0%	0	3.4%	2	0.0%	0
Yes - other service (e.g. hairdresser, travel agent, estate agent)	0.9%	7	1.0%	1	2.8%	2	1.3%	1	0.0%	0	0.8%	1	0.0%	0	1.4%	1	0.5%	0
Yes - leisure activity	2.7%	21	1.6%	2	3.7%	3	2.7%	2	3.1%	3	2.2%	3	3.6%	5	2.6%	1	1.5%	1
Yes - other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(No)	69.1%	531	78.1%	107	57.0%	50	68.4%	60	68.9%	59	66.8%	81	73.2%	107	61.9%	35	69.4%	32
(Don't know / varies)	2.3%	18	3.5%	5	2.1%	2	3.9%	3	4.0%	3	0.0%	0	1.1%	2	3.5%	2	2.0%	1
Weighted base:		768		138		88		88		85		121		146		57		46
Sample:		759		97		95		97		92		95		98		94		91

**Mean score [£]:**

**Q05 Approximately how much money does your household spend per week on its main food and groceries shop at (STORE MENTIONED AT Q01)?**  
*Not 'Don't do' or 'Don't know' at Q01*

£1 - 10	0.4%	3	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	4.5%	2
£11 - 20	2.2%	17	6.6%	9	0.0%	0	0.0%	0	0.6%	1	0.6%	1	1.3%	2	3.4%	2	5.5%	3
£21 - 30	7.0%	55	6.6%	9	2.6%	2	6.8%	6	2.5%	2	11.7%	15	5.2%	8	12.0%	7	11.6%	6
£31 - 40	6.2%	49	2.5%	4	8.0%	7	2.9%	3	5.6%	5	5.5%	7	8.4%	12	10.8%	6	10.1%	5
£41 - 50	11.0%	87	7.6%	10	9.5%	9	10.7%	10	12.6%	11	9.7%	12	12.7%	19	22.7%	14	5.2%	3
£51 - 60	12.1%	96	10.1%	14	6.5%	6	11.1%	10	23.2%	21	16.7%	21	9.6%	14	8.0%	5	9.6%	5
£61 - 70	8.0%	64	9.8%	13	11.4%	10	8.1%	7	1.7%	2	8.2%	11	7.9%	12	8.2%	5	7.3%	4
£71 - 80	11.1%	88	17.2%	24	6.5%	6	4.6%	4	8.5%	8	14.2%	18	13.2%	20	5.9%	3	10.6%	5
£81 - 90	5.7%	45	5.6%	8	12.0%	11	2.9%	3	6.6%	6	0.6%	1	5.1%	8	9.7%	6	7.4%	4
£91 - 100	9.6%	76	10.2%	14	15.7%	14	4.0%	4	9.5%	8	12.1%	15	7.9%	12	4.2%	2	11.9%	6
£101 - 150	9.1%	72	6.5%	9	11.7%	11	16.3%	15	12.6%	11	11.6%	15	5.0%	7	5.4%	3	2.4%	1
£151 - 200	1.0%	8	0.0%	0	2.1%	2	1.6%	1	2.8%	2	0.0%	0	0.6%	1	1.2%	1	0.5%	0
£201+	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	14.9%	118	16.0%	22	11.6%	11	29.9%	27	13.2%	12	5.1%	7	21.4%	32	7.9%	5	8.2%	4
(Refused)	1.5%	12	0.7%	1	2.3%	2	1.0%	1	0.6%	1	1.8%	2	1.7%	3	0.0%	0	5.0%	3
Mean:		72.30		69.55		83.87		77.43		78.55		74.75		67.63		60.52		60.72
Weighted base:		793		138		91		89		89		128		148		60		50
Sample:		792		97		99		99		99		100		100		99		99

**Mean score [Times a week]: Everyday = 7, 5 - 6 times a week = 5.5, 3 - 4 times a week = 3.5, Twice a week = 2, Once a week = 1, Once every two weeks = 0.5, Once a month = 0.25, Less often = 0.1**

**Q06 How often does your household normally visit its main food and grocery shopping destination (STORE MENTIONED AT Q01)?**  
*Not 'Don't do' or 'Don't know' at Q01*

Everyday	1.7%	14	1.6%	2	5.8%	5	1.9%	2	0.0%	0	1.8%	2	1.1%	2	0.7%	0	0.5%	0
5 - 6 times a week	0.5%	4	0.6%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	2.4%	1
3 - 4 times a week	2.9%	23	2.0%	3	3.4%	3	6.5%	6	0.6%	1	1.7%	2	2.4%	4	5.6%	3	3.7%	2
Twice a week	6.6%	53	3.9%	5	9.1%	8	6.7%	6	4.0%	4	7.6%	10	6.2%	9	5.7%	3	13.9%	7
Once a week	69.9%	554	77.9%	107	62.8%	57	74.8%	67	67.5%	60	65.1%	83	72.9%	108	66.9%	40	63.3%	32
Once every two weeks	10.1%	80	10.3%	14	14.3%	13	3.2%	3	17.8%	16	10.4%	13	6.0%	9	15.3%	9	5.0%	3
Once a month	5.1%	41	1.7%	2	0.6%	1	3.8%	3	5.0%	4	8.1%	10	8.8%	13	3.9%	2	8.6%	4
Less often	0.2%	1	0.0%	0	0.0%	0	0.7%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	0
(Don't know / varies)	3.0%	24	2.1%	3	4.0%	4	1.6%	1	4.5%	4	5.3%	7	1.9%	3	2.0%	1	2.0%	1
Mean:		1.18		1.15		1.47		1.34		0.92		1.12		1.13		1.14		1.29
Weighted base:		793		138		91		89		89		128		148		60		50
Sample:		792		97		99		99		99		100		100		99		99

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q07 Where did your household last undertake your 'top-up' food and grocery purchases? (i.e smaller/ 'basket' shopping purchases which are not part of your main food and groceries shop)</b>																		
Aldi, Brackla Street, Bridgend	1.6%	13	5.3%	8	0.6%	1	2.0%	2	2.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Glamorgan Vale Retail Park, Llantrisant	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.9%	0
Aldi, Llynfi Road, Maesteg	0.8%	6	0.0%	0	0.0%	0	6.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Castle Street, Maesteg	1.2%	10	0.0%	0	0.0%	0	10.8%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Colliers Way, Tonypany	4.0%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.9%	29	5.0%	3	0.0%	0
Asda, Coychurch Road, Bridgend	2.0%	16	4.8%	7	2.2%	2	0.0%	0	5.3%	5	1.1%	1	0.0%	0	0.0%	0	1.6%	1
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	2.0%	16	0.0%	0	6.6%	6	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	17.6%	9
Co-op, 278 Tollgate Road, Margam Neath, Port Talbot	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.7%	0	2.6%	1
Co-op, 3-7 Cowbridge Road, Brynsadler, Pontyclun	1.2%	9	0.0%	0	0.0%	0	2.7%	2	0.0%	0	5.4%	7	0.0%	0	0.0%	0	0.0%	0
Co-op, 57 High Street, Cowbridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, 6 Southgate Avenue, Llantrisant, Pontyclun	0.7%	6	0.0%	0	0.0%	0	1.2%	1	0.0%	0	3.0%	4	0.6%	1	0.0%	0	0.0%	0
Co-op, 75 Tylacelyn Road, Penygraig, Tonypany	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	5	0.0%	0	0.0%	0
Co-op, Bridgend Road, Bryncae, Pontyclun	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.8%	2	0.0%	0	0.0%	0	0.0%	0
Co-op, Cambrian Avenue, Gilfach Goch, Porth	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	9	0.0%	0	0.0%	0
Co-op, Lias Road, Porthcawl	1.9%	15	0.0%	0	16.1%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, New Road, Porthcawl	1.7%	14	0.0%	0	13.8%	13	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Penrhwiwer Road, Tonyrefail, Porth	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	6	0.0%	0	0.0%	0
Co-op, Penybont Road, Pencoed, Bridgend	2.5%	20	7.1%	10	0.0%	0	0.7%	1	8.0%	7	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Co-op, Station Road, Treorchy	1.6%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	7	9.4%	6	0.0%	0
Co-op, The Triangle, Canolfan, Brackla	0.6%	5	3.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Co-op, Victoria Street, Pontycymer	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Bracklea Street Shopping Centre, Bridgend	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, High Street, Treorchy	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3	8.4%	5	0.0%	0
Iceland, Llynfi Road, Maesteg	0.7%	5	0.0%	0	0.0%	0	5.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Bridgend Retail Park, Bridgend	1.1%	9	1.1%	2	0.6%	1	0.0%	0	4.5%	4	1.4%	2	0.7%	1	0.0%	0	0.0%	0
Lidl, Broadview, Tondy, Bridgend	1.2%	10	0.0%	0	0.0%	0	2.0%	2	9.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, High Street, Treorchy	1.9%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	10	8.2%	5	0.0%	0
Marks & Spencer, Talbot Green Retail Park, Pontyclun	1.0%	8	0.0%	0	0.6%	1	0.0%	0	0.0%	0	5.5%	7	0.0%	0	0.7%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	1.2%	9	2.3%	3	1.1%	1	1.1%	1	4.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Cowbridge Road, Pontyclun	0.6%	5	0.0%	0	0.6%	1	0.0%	0	0.0%	0	3.4%	4	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Coychurch Road, Pencoed, Bridgend	0.8%	6	2.1%	3	0.0%	0	0.7%	1	2.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, District Centre Broadlands, Bridgend	1.7%	14	9.7%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, High Street, Cowbridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	4.5%	36	17.1%	24	3.4%	3	1.9%	2	1.9%	2	1.7%	2	0.0%	0	1.2%	1	4.0%	2
Tesco Extra, Green Park,	2.7%	21	0.0%	0	1.1%	1	0.0%	0	0.0%	0	13.7%	18	0.7%	1	1.8%	1	1.0%	1

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
Talbot Green, Pontyclun																		
Tesco, Brewery Lane, Bridgend	2.7%	21	13.9%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	2	0.0%	0	0.0%	0	0.0%	0
Tesco, Castle Street, Maesteg	2.3%	18	0.0%	0	0.7%	1	14.1%	13	0.7%	1	0.0%	0	0.0%	0	6.9%	4	0.0%	0
Waitrose, Birds Lane, Cowbridge	1.8%	14	0.0%	0	0.0%	0	0.0%	0	0.6%	1	10.3%	13	0.0%	0	0.0%	0	0.5%	0
Bridgend Town Centre	2.0%	16	9.0%	13	0.6%	1	1.2%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff Bay	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	0.2%	2	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Cowbridge	0.8%	6	4.0%	6	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Kenfig Hill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Lalestan/St Brides	0.1%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llantrisant	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Maesteg	2.3%	19	0.0%	0	0.0%	0	19.5%	18	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.5%	0
Margam	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Merthyr Tydfil	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Pencoed	0.6%	4	0.0%	0	0.0%	0	0.0%	0	5.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	8	0.6%	1	0.0%	0	0.0%	0
Port Talbot	0.4%	3	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	3.0%	2
Porthcawl	1.7%	14	0.0%	0	13.1%	12	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	1.8%	1
Swansea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.5%	0
Tonypanyd	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	4	0.0%	0	0.0%	0
Treorchy	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	2	0.0%	0
Aldi, Commercial Road, Port Talbot	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.7%	1	1.2%	1	1.7%	1
Tesco, Prior Street, Port Talbot	0.3%	3	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	3.0%	2
Picton Court Retail Park, Waterton, Bridgend	0.6%	5	1.1%	2	0.0%	0	2.0%	2	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Baglan Way Retail Park, Afan Way, Port Talbot,	0.4%	4	0.0%	0	1.1%	1	0.0%	0	0.0%	0	1.1%	1	0.6%	1	0.0%	0	0.6%	0
Morrisons, Baglan Industrial Park, Christchurch Road, Port Talbot	0.3%	3	1.0%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.5%	0
Aldi, Cymmer Road, Porth, CF39 9BQ	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0
Cardiff - out of centre	0.7%	5	0.7%	1	0.0%	0	0.0%	0	3.2%	3	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Bridgend - out of centre	0.7%	5	0.0%	0	0.0%	0	0.7%	1	5.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Cymmer Road, Porth, CF39 9BL	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Morrisons, Pontypridd Road, Porth, CF39 9PH	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3	0.0%	0	0.0%	0
Spar, Bute Street, Treherbert, Treorchy, CF42 5NR	0.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.6%	8	0.0%	0
Other, zone 1	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 2	0.2%	2	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 4	0.9%	7	0.0%	0	0.0%	0	0.0%	0	7.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 5	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	1.2%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	10	0.0%	0	0.0%	0
Other, zone 7	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	3	0.0%	0
Other, zone 8	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.2%	6
Other, outside area	1.1%	9	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.6%	1	2.6%	4	6.1%	4	0.0%	0
Internet / delivered	0.9%	7	0.0%	0	0.6%	1	0.0%	0	0.0%	0	4.9%	6	0.0%	0	0.0%	0	0.5%	0
(Don't know / can't remember)	3.7%	30	3.4%	5	9.1%	8	4.3%	4	0.7%	1	0.7%	1	6.4%	9	2.0%	1	1.5%	1
(Don't do this type of shopping)	24.1%	192	12.6%	18	22.0%	20	20.7%	19	33.1%	30	24.6%	32	27.2%	40	20.2%	12	44.0%	22
Weighted base:	800		142		92		90		90		128		148		60		51	
Sample:	800		100		100		100		100		100		100		100		100	

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q08 And where did you go for top-up food shopping the time before that?</b>																		
<i>Not 'Don't do' or 'Don't know' at Q07</i>																		
Aldi, Brackla Street, Bridgend	0.7%	4	0.8%	1	0.0%	0	0.9%	1	4.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Glamorgan Vale Retail Park, Llantrisant	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.9%	0	1.6%	0
Aldi, Llynfi Road, Maesteg	1.7%	10	0.0%	0	0.0%	0	14.7%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Castle Street, Maesteg	2.0%	11	0.0%	0	0.0%	0	16.8%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Colliers Way, Tonypany	4.8%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.5%	26	4.2%	2	0.0%	0
Asda, Coychurch Road, Bridgend	4.4%	25	16.7%	20	0.0%	0	0.0%	0	6.7%	4	0.8%	1	0.0%	0	0.0%	0	1.8%	1
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	2.9%	17	0.0%	0	9.4%	6	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	36.9%	10
Co-op, 278 Tollgate Road, Margam Neath, Port Talbot	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.9%	0	3.1%	1
Co-op, 3-7 Cowbridge Road, Brynsadler, Pontyclun	1.5%	8	0.0%	0	0.0%	0	3.6%	2	0.0%	0	6.3%	6	0.0%	0	0.0%	0	0.0%	0
Co-op, 57 High Street, Cowbridge	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0
Co-op, 6 Southgate Avenue, Llantrisant, Pontyclun	1.2%	7	0.0%	0	0.0%	0	1.6%	1	0.0%	0	5.0%	5	0.9%	1	0.0%	0	0.0%	0
Co-op, 75 Tylacelyn Road, Penygraig, Tonypany	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	5	0.0%	0	0.0%	0
Co-op, Bridgend Road, Bryncae, Pontyclun	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0
Co-op, Cambrian Avenue, Gilfach Goch, Porth	1.5%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.7%	9	0.0%	0	0.0%	0
Co-op, Lias Road, Porthcawl	1.9%	11	0.0%	0	17.7%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, New Road, Porthcawl	1.9%	11	0.0%	0	16.9%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Penrhwiwer Road, Tonyrefail, Porth	1.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	6	0.0%	0	0.0%	0
Co-op, Penybont Road, Pencoed, Bridgend	2.9%	17	6.2%	7	0.0%	0	0.0%	0	12.2%	7	1.8%	2	0.0%	0	0.0%	0	1.1%	0
Co-op, Station Road, Treorchy	1.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.8%	6	0.0%	0
Co-op, The Triangle, Canolfan, Brackla	0.5%	3	2.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Victoria Street, Pontycymer	0.1%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Bracklea Street Shopping Centre, Bridgend	0.4%	3	1.4%	2	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, High Street, Treorchy	1.6%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	4	10.5%	5	0.0%	0
Iceland, Llynfi Road, Maesteg	0.8%	5	0.0%	0	0.0%	0	7.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Bridgend Retail Park, Bridgend	3.2%	19	5.7%	7	3.5%	2	0.0%	0	14.7%	9	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, Broadview, Tondu, Bridgend	1.2%	7	1.8%	2	0.0%	0	0.9%	1	6.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, High Street, Treorchy	2.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.6%	7	12.7%	6	0.0%	0
Marks & Spencer Outlet, McArthurGlen Designer Outlet, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Talbot Green Retail Park, Pontyclun	2.1%	12	0.0%	0	0.9%	1	0.0%	0	0.0%	0	12.0%	11	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	2.4%	14	2.1%	3	5.8%	4	0.8%	1	9.8%	6	0.0%	0	0.0%	0	3.0%	1	0.0%	0
Tesco Express, Cowbridge Road, Pontyclun	0.6%	3	0.0%	0	0.9%	1	0.0%	0	0.0%	0	2.9%	3	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Coychurch Road, Pencoed, Bridgend	1.6%	10	8.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, District Centre Broadlands, Bridgend	2.5%	14	12.1%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, High Street, Cowbridge	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	4	0.0%	0	0.0%	0	0.0%	0

# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
Tesco Extra, Cowbridge Road, Bridgend	4.0%	23	9.7%	12	4.2%	3	2.5%	2	3.0%	2	2.8%	3	0.0%	0	1.5%	1	8.3%	2
Tesco Extra, Green Park, Talbot Green, Pontyclun	3.2%	18	0.0%	0	0.0%	0	0.0%	0	0.9%	1	14.8%	14	2.2%	2	2.3%	1	0.9%	0
Tesco, Brewery Lane, Bridgend	3.5%	20	12.9%	15	0.0%	0	3.4%	2	1.1%	1	1.8%	2	0.0%	0	0.0%	0	1.1%	0
Tesco, Castle Street, Maesteg	3.2%	18	0.0%	0	1.0%	1	19.2%	13	1.1%	1	0.0%	0	0.0%	0	8.8%	4	0.0%	0
Waitrose, Birds Lane, Cowbridge	1.6%	9	0.8%	1	0.9%	1	0.0%	0	0.0%	0	7.9%	8	0.0%	0	0.0%	0	0.9%	0
Bridgend Town Centre	2.8%	16	10.3%	12	0.0%	0	1.6%	1	3.0%	2	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Cardiff City Centre	0.7%	4	0.0%	0	2.1%	1	0.0%	0	0.0%	0	2.7%	3	0.0%	0	0.0%	0	0.0%	0
Cowbridge	1.4%	8	4.8%	6	0.0%	0	0.0%	0	0.9%	1	1.6%	2	0.0%	0	0.0%	0	0.0%	0
Kenfig Hill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1
Lalestan/St Brides	0.3%	2	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llantrisant	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Maesteg	2.8%	16	0.0%	0	0.0%	0	22.6%	15	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.9%	0
Margam	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	1
Merthyr Tydfil	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.9%	0
Pencoed	0.8%	4	0.0%	0	0.0%	0	0.0%	0	7.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	1.5%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.1%	9	0.0%	0	0.0%	0	0.0%	0
Port Talbot	0.9%	5	0.0%	0	1.9%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	2.3%	1	4.6%	1
Porthcawl	2.5%	14	0.0%	0	22.5%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pyle	0.1%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea	0.4%	2	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	2.5%	1
Tondu	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tonypanyd	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	5	0.0%	0	0.0%	0
Treorchy	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0
Aldi, Commercial Road, Port Talbot	1.2%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	3	2.2%	2	2.3%	1	2.9%	1
Tesco, Prior Street, Port Talbot	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	1
Picton Court Retail Park, Waterton, Bridgend	1.8%	10	0.7%	1	0.0%	0	2.7%	2	8.0%	5	0.0%	0	1.1%	1	0.0%	0	7.3%	2
Lidl, Baglan Way Retail Park, Afan Way, Port Talbot,	0.2%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Baglan Industrial Park, Christchurch Road, Port Talbot	0.3%	2	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Aldi, Cymmer Road, Porth, CF39 9BQ	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	4	0.0%	0	0.0%	0
Cardiff - out of centre	1.3%	7	0.8%	1	1.5%	1	0.0%	0	4.1%	2	3.2%	3	0.0%	0	0.0%	0	0.0%	0
Bridgend - out of centre	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Cymmer Road, Porth, CF39 9BL	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Morrisons, Pontypridd Road, Porth, CF39 9PH	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0
Spar, Bute Street, Treherbert, Treorchy, CF42 5NR	1.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.1%	6	0.0%	0
Treherbert	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0
Other, zone 1	0.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 2	0.2%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 4	1.1%	6	0.0%	0	0.0%	0	0.0%	0	10.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 5	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	2.0%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.6%	11	0.0%	0	0.0%	0
Other, zone 7	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.5%	4	0.0%	0
Other, zone 8	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.1%	3
Other, outside area	2.4%	14	0.0%	0	1.0%	1	0.0%	0	1.1%	1	0.8%	1	8.1%	8	7.8%	4	0.0%	0
Internet / delivered	1.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.6%	6	0.0%	0	0.0%	0	0.9%	0
(Don't know / can't remember)	0.8%	5	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0	2.6%	3	0.9%	0	0.0%	0
Weighted base:	578	119	63	67	59	96	98	47	28									
Sample:	572	78	79	72	68	75	64	75	61									

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Mean score [£]:</b>																		
<b>Q09 Approximately how much money does your household spend per week on top-up food and groceries shopping (STORE MENTIONED AT Q07)?</b>																		
<i>Not 'Don't do' or 'Don't know' at Q07</i>																		
£1 - 10	33.5%	193	26.5%	32	44.0%	28	30.7%	21	36.4%	22	35.0%	33	26.6%	26	46.1%	22	38.3%	11
£11 - 20	23.4%	135	29.0%	35	15.4%	10	17.1%	11	19.5%	12	21.3%	20	27.5%	27	26.3%	12	28.6%	8
£21 - 30	16.4%	95	15.2%	18	12.0%	8	24.4%	16	19.4%	12	18.3%	18	15.6%	15	11.5%	5	10.9%	3
£31 - 40	3.6%	21	4.2%	5	2.4%	2	4.7%	3	0.0%	0	7.4%	7	1.9%	2	4.5%	2	0.9%	0
£41 - 50	3.0%	17	6.3%	7	6.5%	4	1.3%	1	3.5%	2	0.8%	1	0.9%	1	1.7%	1	0.0%	0
£51 - 60	0.5%	3	0.0%	0	0.9%	1	0.0%	0	0.9%	1	0.8%	1	0.9%	1	0.0%	0	0.0%	0
£61 - 70	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£71 - 80	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.9%	0
£81 - 90	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£91 - 100	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£101 - 150	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£151 - 200	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£201+	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0
(Don't know / varies)	17.3%	100	18.8%	23	16.3%	10	19.7%	13	18.4%	11	10.6%	10	24.0%	24	7.6%	4	19.5%	5
(Refused)	2.0%	11	0.0%	0	2.4%	2	1.3%	1	1.8%	1	4.8%	5	2.6%	3	0.9%	0	0.9%	0
<i>Mean:</i>		<i>18.04</i>		<i>19.81</i>		<i>16.70</i>		<i>18.56</i>		<i>17.50</i>		<i>18.65</i>		<i>16.80</i>		<i>18.26</i>		<i>14.68</i>
Weighted base:		578		119		63		67		59		96		98		47		28
Sample:		572		78		79		72		68		75		64		75		61

<b>Q09A When your household undertakes its top-up food and grocery spend (STORE MENTIONED AT Q07) does it visit other shops, leisure or service outlets on the same shopping trips? And if so which ones? [MR]</b>																		
<i>Not 'Don't do' or 'Don't know' or 'Internet' at Q07</i>																		
Yes - other food shops	6.0%	34	1.4%	2	9.0%	6	5.3%	4	6.4%	4	3.0%	3	6.6%	6	17.0%	8	8.5%	2
Yes - other non food shops (clothing, footwear, electrical etc)	8.9%	51	14.5%	17	10.8%	7	2.5%	2	7.3%	4	8.2%	7	6.4%	6	13.9%	6	2.8%	1
Yes - pubs, restaurants or cafes	3.2%	18	4.9%	6	0.0%	0	0.9%	1	3.2%	2	2.5%	2	2.0%	2	11.6%	5	0.9%	0
Yes - financial service (i.e. bank, building society)	2.5%	14	0.0%	0	4.5%	3	0.9%	1	5.0%	3	2.4%	2	0.0%	0	11.9%	6	1.1%	0
Yes - other service (e.g. hairdresser, travel agent, estate agent)	1.7%	10	0.0%	0	3.4%	2	0.0%	0	4.4%	3	3.3%	3	0.0%	0	4.1%	2	0.9%	0
Yes - leisure activity	4.1%	23	0.0%	0	2.7%	2	3.6%	2	13.6%	8	2.4%	2	6.7%	7	3.8%	2	1.8%	1
Yes - other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(No)	74.3%	424	72.0%	86	70.8%	44	82.4%	55	64.8%	38	81.9%	73	81.1%	80	53.6%	25	79.2%	22
(Don't know / varies)	4.6%	26	9.8%	12	3.5%	2	6.2%	4	3.0%	2	0.9%	1	2.7%	3	2.3%	1	5.7%	2
Weighted base:		570		119		63		67		59		89		98		47		27
Sample:		569		78		78		72		68		74		64		75		60

<b>Q10 Does your household also spend money on food and groceries in small shops or market stalls? (i.e., not supermarkets)</b>																		
Yes	37.6%	300	35.4%	50	55.4%	51	36.5%	33	24.2%	22	34.5%	44	33.9%	50	53.3%	32	36.4%	18
No	62.4%	500	64.6%	92	44.6%	41	63.5%	57	75.8%	68	65.5%	84	66.1%	98	46.7%	28	63.6%	32
Weighted base:		800		142		92		90		90		128		148		60		51
Sample:		800		100		100		100		100		100		100		100		100

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q11 Where are these small shops or market stalls located?</b>																		
<i>Yes at Q10</i>																		
Aberkenfig (Valleys Gateway)	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2	0.0%	0	0.0%	0
Bridgend Town Centre	23.4%	70	89.2%	45	19.9%	10	12.5%	4	39.1%	8	0.0%	0	1.9%	1	0.0%	0	9.4%	2
Cardiff City Centre	2.0%	6	1.6%	1	0.0%	0	0.0%	0	5.4%	1	2.1%	1	6.2%	3	0.0%	0	0.0%	0
Cowbridge	5.3%	16	7.6%	4	0.0%	0	0.0%	0	7.2%	2	23.9%	11	0.0%	0	0.0%	0	0.0%	0
Kenfig Hill	3.4%	10	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	52.8%	10
Llantrisant	1.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	3	0.0%	0	0.0%	0	0.0%	0
Maesteg	10.1%	30	0.0%	0	0.0%	0	78.8%	26	8.8%	2	0.0%	0	0.0%	0	8.4%	3	0.0%	0
Merthyr Tydfil	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0
Neath	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	2.3%	0
Pencoed	2.3%	7	0.0%	0	0.0%	0	0.0%	0	31.3%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	2.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.9%	9	0.0%	0	0.0%	0	0.0%	0
Pontypridd	0.9%	3	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	1.9%	1	3.4%	1	0.0%	0
Port Talbot	1.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.5%	5	5.7%	1
Porthcawl	14.6%	44	1.6%	1	71.5%	36	0.0%	0	2.9%	1	0.0%	0	5.3%	3	0.0%	0	17.2%	3
Pyle	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1
Swansea	1.4%	4	0.0%	0	0.0%	0	6.9%	2	0.0%	0	0.0%	0	1.9%	1	0.0%	0	5.3%	1
Talbot Green Shopping Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Talbot Green Town Centre	4.0%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.2%	9	5.0%	3	0.0%	0	0.0%	0
Tonypanyd	7.2%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	43.1%	22	0.0%	0	0.0%	0
Tonyrefail	1.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.7%	4	0.0%	0	0.0%	0
Treorchy	5.2%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	3	39.5%	13	0.0%	0
Cardiff - out of centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Treherbert	2.4%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.3%	7	0.0%	0
Other, zone 5	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	1.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.9%	5	0.0%	0	0.0%	0
Other, zone 7	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	1	0.0%	0
Other, outside area	2.4%	7	0.0%	0	1.3%	1	0.0%	0	0.0%	0	8.3%	4	2.2%	1	3.4%	1	3.0%	1
(Don't know / can't remember)	3.5%	10	0.0%	0	6.2%	3	1.8%	1	2.9%	1	8.4%	4	3.2%	2	1.3%	0	1.6%	0
Weighted base:		300		50		51		33		22		44		50		32		18
Sample:		302		32		48		36		29		35		37		48		37

**Mean score [£]:**

**Q12 Approximately how much money does your household spend per week on food and groceries in these small shops?**  
*Yes at Q10*

£1 - 10	43.3%	130	38.2%	19	34.7%	18	19.5%	6	33.1%	7	42.5%	19	60.9%	31	67.7%	22	46.2%	9
£11 - 20	19.2%	58	22.1%	11	16.1%	8	35.3%	12	19.5%	4	22.6%	10	10.9%	5	15.3%	5	12.7%	2
£21 - 30	6.4%	19	6.2%	3	12.9%	7	0.0%	0	0.0%	0	11.9%	5	3.2%	2	2.2%	1	11.0%	2
£31 - 40	1.2%	4	0.0%	0	1.9%	1	1.8%	1	2.9%	1	0.0%	0	0.0%	0	4.0%	1	1.4%	0
£41 - 50	0.5%	2	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0
£51 - 60	1.2%	4	0.0%	0	0.0%	0	5.5%	2	2.5%	1	0.0%	0	1.9%	1	0.0%	0	1.6%	0
£61 - 70	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£71 - 80	0.3%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	0
£81 - 90	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£91 - 100	0.3%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0
£101 - 150	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£151 - 200	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£201+	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	24.5%	74	31.8%	16	33.2%	17	34.3%	11	36.6%	8	17.8%	8	18.1%	9	7.4%	2	12.4%	2
(Refused)	2.9%	9	0.0%	0	1.1%	1	0.0%	0	5.4%	1	5.1%	2	5.0%	3	0.0%	0	12.4%	2
Mean:		13.99		12.33		14.18		22.49		13.98		14.27		10.07		13.03		16.71
Weighted base:		300		50		51		33		22		44		50		32		18
Sample:		302		32		48		36		29		35		37		48		37

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Mean score [%]:</b>																		
<b>Q13 Approximately what proportion of your household's total spending on all food and grocery goods is done using the Internet?</b>																		
0% - 10%	78.7%	630	84.7%	120	59.3%	55	70.8%	64	77.1%	69	81.0%	104	82.4%	122	85.6%	51	89.1%	45
11% - 20%	2.2%	18	2.7%	4	5.6%	5	0.0%	0	5.2%	5	1.1%	1	0.7%	1	3.2%	2	0.0%	0
21% - 30%	1.3%	10	2.6%	4	0.0%	0	0.7%	1	3.2%	3	0.7%	1	0.7%	1	0.7%	0	1.4%	1
31% - 40%	0.7%	5	0.7%	1	1.3%	1	0.0%	0	0.0%	0	2.2%	3	0.0%	0	0.0%	0	0.5%	0
41% - 50%	4.4%	35	5.9%	8	10.6%	10	4.6%	4	0.0%	0	2.8%	4	5.7%	8	1.9%	1	0.0%	0
51% - 60%	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
61% - 70%	0.5%	4	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.7%	1	0.7%	1	0.7%	0	0.0%	0
71% - 80%	2.7%	21	0.0%	0	1.2%	1	0.0%	0	5.4%	5	1.4%	2	7.3%	11	2.4%	1	2.8%	1
81% - 90%	2.0%	16	0.0%	0	2.8%	3	1.2%	1	1.3%	1	5.3%	7	0.6%	1	3.1%	2	2.7%	1
91% - 100%	0.8%	6	0.0%	0	0.6%	1	0.0%	0	0.7%	1	3.2%	4	0.0%	0	1.2%	1	0.0%	0
(Don't know / varies)	3.8%	30	0.6%	1	10.4%	10	13.9%	12	1.2%	1	1.7%	2	1.8%	3	0.0%	0	3.0%	2
(Refused)	3.0%	24	2.9%	4	7.4%	7	8.9%	8	4.5%	4	0.0%	0	0.0%	0	1.3%	1	0.5%	0
<i>Mean:</i>	<i>9.01</i>		<i>4.69</i>		<i>13.88</i>		<i>5.07</i>		<i>9.54</i>		<i>12.44</i>		<i>10.57</i>		<i>8.20</i>		<i>5.79</i>	
Weighted base:	800	142	92	90	90	128	148	60	51									
Sample:	800	100	100	100	100	100	100	100	100									



# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q14 So, speaking as an individual, can you tell me where you last made a purchase of clothes or shoes?</b>																		
Aldi, Brackla Street, Bridgend	0.5%	4	0.0%	0	0.0%	0	4.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Colliers Way, Tonypany	0.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	3.6%	5	0.8%	0	0.0%	0
Asda, Coychurch Road, Bridgend	1.3%	10	3.0%	4	0.0%	0	0.0%	0	4.4%	4	0.7%	1	0.0%	0	2.4%	1	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.5%	4	0.0%	0	3.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Marks & Spencer Outlet, McArthurGlen Designer Outlet, Bridgend	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Talbot Green Retail Park, Pontyclun	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	0.4%	3	0.6%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	1.1%	2	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	0.9%	7	1.5%	2	5.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Tesco Extra, Green Park, Talbot Green, Pontyclun	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	3	1.1%	2	0.0%	0	0.5%	0
Tesco, Castle Street, Maesteg	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	4	0.0%	0
Aberkenfig (Valleys Gateway)	0.5%	4	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3	0.0%	0	0.0%	0
Bridgend Town Centre	13.3%	107	31.1%	44	12.3%	11	16.0%	14	17.8%	16	2.7%	3	5.1%	7	0.0%	0	20.0%	10
Caerphilly	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Cardiff Bay	0.4%	3	0.0%	0	0.0%	0	0.7%	1	2.1%	2	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	16.1%	129	17.1%	24	21.6%	20	15.0%	13	15.1%	14	21.9%	28	12.1%	18	5.4%	3	16.2%	8
Cowbridge	1.4%	11	1.6%	2	0.6%	1	0.6%	1	0.0%	0	5.0%	6	1.1%	2	0.0%	0	0.0%	0
Llantrisant	3.6%	29	1.9%	3	0.7%	1	4.6%	4	3.7%	3	2.4%	3	9.2%	14	2.5%	1	0.5%	0
Maesteg	1.1%	9	0.0%	0	0.0%	0	9.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merthyr Tydfil	0.6%	5	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	6.7%	4	0.0%	0
Neath	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.5%	0
Newport City Centre	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pencoed	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0
Pontypridd	1.9%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	9	10.0%	6	0.0%	0
Port Talbot	1.9%	15	0.0%	0	2.4%	2	2.6%	2	0.0%	0	1.8%	2	0.0%	0	5.7%	3	9.6%	5
Porthcawl	1.9%	15	1.1%	2	10.6%	10	0.0%	0	0.6%	1	0.0%	0	0.0%	0	1.3%	1	4.1%	2
Pyle	0.2%	2	0.0%	0	1.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea City Centre	4.1%	33	0.6%	1	1.2%	1	5.5%	5	1.9%	2	5.6%	7	5.1%	7	5.5%	3	12.4%	6
Talbot Green Town Centre	2.2%	17	0.0%	0	0.0%	0	0.6%	1	1.2%	1	6.4%	8	4.0%	6	2.7%	2	0.0%	0
Tonypany	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3	3.0%	2	0.0%	0
Treorchy	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	1.8%	1	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	0.4%	3	0.7%	1	0.6%	1	0.0%	0	0.7%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Bridgend Shopping Centre, Cheapside, Bridgend	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glamorgan Vale Retail Park, Talbot Green	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.6%	1	0.8%	0	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	11.6%	93	16.3%	23	11.8%	11	12.1%	11	14.6%	13	5.9%	8	13.3%	20	6.8%	4	8.1%	4
Talbot Green Shopping Park	5.6%	45	0.7%	1	0.7%	1	4.6%	4	1.3%	1	16.2%	21	10.3%	15	3.2%	2	0.5%	0
Waterton Retail Park, Waterton Road, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1
Cardiff - out of centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	3.7%	2	0.6%	0
Marks & Spencer, Copthorne Way, Cardiff, CF5 6YZ	0.3%	2	0.0%	0	1.7%	2	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Porth	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0
Other, outside area	1.7%	14	5.8%	8	1.7%	2	0.0%	0	0.0%	0	1.2%	2	1.1%	2	0.7%	0	0.6%	0
Internet / delivered	14.1%	113	7.9%	11	14.7%	13	13.5%	12	29.6%	27	15.1%	19	10.5%	16	15.6%	9	9.8%	5
Home catalogue	1.6%	12	0.0%	0	3.4%	3	0.6%	1	1.2%	1	1.2%	2	1.7%	3	4.7%	3	1.5%	1
TV / Interactive shopping	0.4%	3	2.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	2.2%	18	4.7%	7	2.0%	2	1.3%	1	0.6%	1	1.7%	2	0.6%	1	3.7%	2	4.5%	2
(Don't do this type of shopping)	4.2%	34	2.6%	4	1.9%	2	6.8%	6	3.3%	3	4.3%	6	4.7%	7	4.5%	3	7.9%	4
Weighted base:	800	142		92		90		90		90		128		148		60		51

Column %ges.

# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Sample:	800	100	100	100	100	100	100	100	100

**Mean score [Times a year]: Everyday = 365, 5 - 6 times a week = 286, 3 - 4 times a week = 182, Twice a week = 104, Once a week = 52, Once every two weeks = 26, Once a month = 12, Once every two months = 6, 3 or 4 times a year = 3.5, Twice a year = 2, Once a year = 1, Less often = 0.5**

### Q15 How often do you visit (LOCATION MENTIONED AT Q14) for clothes or shoes shopping?

*Not 'Don't do' or 'Don't know' at Q14*

Everyday	2.9%	22	10.5%	14	7.1%	6	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.9%	0	0.0%	0
5 - 6 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
3 - 4 times a week	0.9%	7	0.7%	1	1.9%	2	0.7%	1	0.0%	0	0.0%	0	1.9%	3	1.3%	1	0.6%	0
Twice a week	0.6%	4	0.0%	0	0.8%	1	2.9%	2	0.0%	0	0.8%	1	0.0%	0	0.9%	0	0.0%	0
Once a week	4.1%	31	1.8%	2	3.7%	3	4.9%	4	7.3%	6	5.1%	6	3.2%	5	1.3%	1	7.6%	3
Once every two weeks	6.9%	52	3.7%	5	13.8%	12	10.0%	8	8.2%	7	4.7%	6	7.5%	10	4.2%	2	2.1%	1
Once a month	23.2%	174	29.1%	38	21.8%	19	20.0%	17	25.7%	22	24.0%	29	20.2%	28	19.8%	11	21.8%	10
Once every two months	14.9%	112	9.0%	12	6.5%	6	13.8%	11	14.0%	12	17.3%	21	25.1%	35	13.8%	8	16.3%	7
3 or 4 times a year	10.9%	82	10.5%	14	9.9%	9	4.4%	4	11.1%	10	20.4%	25	5.9%	8	15.0%	8	11.3%	5
Twice a year	11.7%	87	12.7%	17	4.3%	4	15.6%	13	10.9%	9	17.2%	21	6.8%	10	18.9%	10	8.6%	4
Once a year	3.2%	24	0.0%	0	0.6%	1	4.6%	4	3.5%	3	1.8%	2	7.3%	10	2.9%	2	6.1%	3
Less often	6.2%	46	5.3%	7	13.6%	12	7.4%	6	3.8%	3	0.7%	1	8.9%	13	2.9%	2	6.8%	3
(Don't know / varies)	14.4%	108	16.7%	22	16.0%	14	15.7%	13	15.6%	13	7.0%	8	13.2%	18	18.3%	10	18.8%	8
<i>Mean:</i>	<i>24.83</i>	<i>55.45</i>	<i>46.65</i>	<i>15.71</i>	<i>12.44</i>	<i>14.76</i>	<i>13.25</i>	<i>14.89</i>	<i>12.03</i>									
Weighted base:	749	132	88	82	86	120	140	55	44									
Sample:	742	95	94	89	95	96	93	90	90									

### Q16 How do you normally travel to (LOCATION MENTIONED AT Q14)?

*Not 'Don't do' or 'Don't know' or Internet / delivery at Q14*

Car - Driver	72.8%	452	71.8%	85	86.0%	62	85.2%	60	82.7%	48	70.4%	70	68.1%	83	55.4%	24	54.2%	21
Car - Passenger	9.8%	61	5.9%	7	3.7%	3	3.6%	2	7.7%	4	12.8%	13	15.2%	18	22.5%	10	9.3%	4
Bus	10.5%	65	10.6%	13	5.7%	4	7.2%	5	5.3%	3	9.8%	10	14.3%	17	7.2%	3	26.4%	10
Cycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Disabled vehicle (e.g. mobility scooter)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Taxi	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Train	1.7%	11	0.8%	1	0.0%	0	0.7%	1	1.1%	1	0.8%	1	0.8%	1	7.3%	3	9.4%	4
Walk	3.9%	24	10.8%	13	3.7%	3	3.3%	2	0.0%	0	5.5%	5	0.8%	1	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.1%	7	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.8%	1	0.9%	1	7.6%	3	0.0%	0
Weighted base:	621	118	72	70	59	100	122	43	39									
Sample:	609	85	75	73	76	79	82	68	71									

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q17 And the time before that, where did your household go to make a purchase of clothes or shoes?</b>																		
<i>Not 'Don't do' or 'Don't know' at Q14</i>																		
Asda, Colliers Way, Tonypany	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.8%	3	0.9%	0	0.0%	0
Asda, Coychurch Road, Bridgend	1.3%	10	2.8%	4	1.1%	1	0.0%	0	1.1%	1	1.4%	2	1.1%	2	1.3%	1	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Marks & Spencer Outlet, McArthurGlen Designer Outlet, Bridgend	0.2%	1	0.6%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Talbot Green Retail Park, Pontyclun	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Tesco Extra, Cowbridge Road, Bridgend	0.8%	6	2.9%	4	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.6%	0
Tesco Extra, Green Park, Talbot Green, Pontyclun	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, Brewery Lane, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, Castle Street, Maesteg	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Aberkenfig (Valleys Gateway)	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	3	0.0%	0	0.0%	0
Bridgend Town Centre	11.4%	85	21.5%	28	7.4%	7	16.6%	14	17.1%	15	1.4%	2	7.3%	10	0.0%	0	22.8%	10
Caerphilly	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Cardiff Bay	0.7%	5	2.2%	3	0.0%	0	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	24.4%	183	27.5%	36	17.1%	15	32.9%	27	24.0%	21	32.3%	39	20.9%	29	16.4%	9	14.4%	6
Cowbridge	0.8%	6	0.7%	1	1.3%	1	0.0%	0	0.0%	0	3.4%	4	0.0%	0	0.0%	0	0.0%	0
Llantrisant	2.4%	18	1.4%	2	0.8%	1	0.0%	0	1.4%	1	1.4%	2	7.4%	10	3.5%	2	0.0%	0
Maesteg	1.2%	9	0.0%	0	0.0%	0	6.0%	5	0.0%	0	0.0%	0	0.0%	0	7.1%	4	0.0%	0
Merthyr Tydfil	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.7%	0	0.0%	0
Neath	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	1.2%	1
Pontyclun	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Pontypridd	2.0%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.6%	11	8.1%	4	0.0%	0
Port Talbot	1.5%	11	0.0%	0	0.6%	1	2.5%	2	0.0%	0	1.1%	1	0.0%	0	6.7%	4	8.1%	4
Porthcawl	1.2%	9	0.6%	1	8.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0
Pyle	0.2%	2	0.0%	0	1.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea City Centre	4.5%	34	3.0%	4	2.0%	2	16.4%	14	2.2%	2	0.0%	0	1.4%	2	4.0%	2	19.4%	9
Talbot Green Town Centre	2.6%	20	0.0%	0	0.0%	0	0.0%	0	0.7%	1	10.2%	12	3.7%	5	2.9%	2	0.0%	0
Tonypany	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0
Treorchy	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	4.2%	2	0.0%	0
Aberfan Shopping Centre, Port Talbot	0.2%	1	0.0%	0	0.6%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	1.0%	8	1.1%	1	5.9%	5	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.7%	0
Glamorgan Vale Retail Park, Talbot Green	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	12.4%	93	10.7%	14	21.9%	19	4.3%	4	17.0%	15	13.9%	17	11.0%	15	8.0%	4	10.6%	5
Talbot Green Shopping Park	5.3%	40	1.2%	2	0.0%	0	5.0%	4	2.8%	2	9.1%	11	11.9%	17	2.0%	1	7.1%	3
Abroad	0.4%	3	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Cardiff - out of centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	4.3%	2	0.7%	0
Enterprise Retail Park, Nantyffin Road, Llansamlet, Swansea, SA7 9RF	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0
Marks & Spencer, Copthorne Way, Cardiff, CF5 6YZ	1.0%	7	0.6%	1	2.4%	2	0.0%	0	0.0%	0	2.3%	3	1.1%	2	0.0%	0	0.0%	0
Other, outside area	1.2%	9	2.3%	3	1.3%	1	0.0%	0	0.6%	1	1.8%	2	1.1%	2	1.5%	1	0.0%	0
Internet / delivered	14.7%	110	18.0%	24	18.2%	16	12.9%	11	28.4%	24	11.3%	14	6.2%	9	16.3%	9	9.4%	4
Home catalogue	2.2%	16	0.6%	1	1.3%	1	0.6%	1	1.3%	1	1.3%	2	6.7%	9	2.9%	2	0.6%	0
(Don't know / can't remember)	2.5%	19	0.6%	1	5.0%	4	2.1%	2	3.0%	3	2.5%	3	2.9%	4	3.7%	2	1.1%	1
Weighted base:		749		132		88		82		86		120		140		55		44
Sample:		742		95		94		89		95		96		93		90		90

Column %ges.

# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q18 Now can you tell me where your household last made a purchase of furniture, carpets, or soft household furnishings?</b>																		
Asda, Colliers Way, Tonypany	0.6%	5	0.0%	0	0.0%	0	4.6%	4	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Coychurch Road, Bridgend	0.3%	3	0.0%	0	0.0%	0	0.0%	0	2.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0
Sainsbury's, The Derwen, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Brewery Lane, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Aberkenfig (Valleys Gateway)	1.2%	10	2.9%	4	0.0%	0	1.1%	1	4.2%	4	0.0%	0	0.0%	0	0.8%	0	0.5%	0
Barry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	8.3%	67	15.8%	22	8.7%	8	14.5%	13	11.7%	11	6.3%	8	1.7%	3	1.8%	1	2.1%	1
Caerphilly	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff Bay	0.6%	5	2.0%	3	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Cardiff City Centre	5.2%	42	3.7%	5	7.0%	6	10.5%	9	5.6%	5	9.7%	12	1.1%	2	0.0%	0	3.5%	2
Cowbridge	0.3%	2	0.0%	0	0.0%	0	0.7%	1	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Kenfig Hill	0.5%	4	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	4.0%	2
Lalestan/St Brides	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llantrisant	2.7%	22	7.1%	10	0.6%	1	0.7%	1	2.3%	2	2.9%	4	2.5%	4	1.5%	1	0.5%	0
Llantwit Major	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Maesteg	1.8%	14	0.6%	1	0.0%	0	12.9%	12	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.5%	0
Merthyr Tydfil	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	5.1%	3	0.0%	0
Neath	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Ogmore Vale	0.2%	1	0.0%	0	0.0%	0	0.7%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pencoed	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Pontyclun	2.8%	23	0.6%	1	0.6%	1	0.0%	0	0.0%	0	12.2%	16	2.3%	3	0.0%	0	4.0%	2
Pontycymer	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontypridd	1.7%	14	0.0%	0	0.0%	0	0.6%	1	0.6%	1	1.1%	1	7.5%	11	0.7%	0	0.0%	0
Port Talbot	1.2%	10	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	14.0%	7
Porthcawl	0.5%	4	0.0%	0	3.6%	3	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Pyle	1.1%	9	0.6%	1	1.7%	2	0.0%	0	1.0%	1	0.0%	0	1.1%	2	0.0%	0	7.4%	4
Swansea City Centre	0.7%	6	0.0%	0	0.0%	0	3.0%	3	0.7%	1	0.0%	0	0.0%	0	2.4%	1	2.2%	1
Talbot Green Town Centre	0.8%	6	0.0%	0	0.0%	0	0.0%	0	1.2%	1	2.4%	3	0.7%	1	0.7%	0	0.9%	0
Tondu	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0
Tonypany	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	7	1.2%	1	0.0%	0
Treorchy	1.3%	11	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	2.0%	3	12.1%	7	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	3.7%	30	3.9%	6	3.9%	4	1.3%	1	4.0%	4	5.8%	7	3.5%	5	0.7%	0	5.7%	3
Bridgend Shopping Centre, Cheapside, Bridgend	0.8%	7	4.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glamorgan Vale Retail Park, Talbot Green	0.6%	5	0.0%	0	2.2%	2	0.0%	0	0.0%	0	2.2%	3	0.0%	0	0.0%	0	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	0.6%	5	0.7%	1	0.0%	0	4.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Picton Court Retail Park, Waterton, Bridgend	0.7%	5	2.0%	3	0.0%	0	0.0%	0	1.4%	1	0.7%	1	0.0%	0	0.8%	0	0.0%	0
Talbot Green Shopping Park	1.3%	10	0.0%	0	0.0%	0	0.0%	0	2.3%	2	2.7%	3	3.1%	5	0.7%	0	0.0%	0
Waterton Retail Park, Waterton Road, Bridgend	1.7%	13	4.6%	7	0.7%	1	0.0%	0	3.0%	3	0.0%	0	1.1%	2	3.0%	2	0.0%	0
Brown Lennox Retail Park, Ynysangharad Road, Pontypridd, CF37 4DA	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Capital Shopping Park, Leckwith Road, Cardiff, CF11 8EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Cardiff - out of centre	0.8%	6	0.0%	0	0.6%	1	0.0%	0	0.0%	0	2.2%	3	0.6%	1	3.3%	2	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	2.4%	1	0.0%	0
Enterprise Retail Park, Nantyffin Road, Llansamlet, Swansea, SA7 9RF	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.9%	5	0.6%	0
Gelli	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.7%	0	0.0%	0
Ikea, Ferry Road, Cardiff, CF11 0XR	1.5%	12	0.0%	0	2.2%	2	0.6%	1	0.7%	1	2.0%	3	4.4%	6	0.0%	0	0.0%	0
Marks & Spencer, Copthorne Way, Cardiff, CF5 6YZ	0.4%	3	0.0%	0	1.2%	1	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Porth	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3	0.0%	0	0.0%	0

Column %ges.

# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
Ton Pentre	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	4	1.8%	1	0.0%	0
Other, zone 1	0.3%	2	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 4	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Other, zone 5	0.6%	4	0.6%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	3	0.6%	1	0.0%	0	0.0%	0
Other, zone 6	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Other, outside area	0.5%	4	0.0%	0	1.3%	1	0.6%	1	0.0%	0	0.7%	1	0.0%	0	0.7%	0	1.5%	1
Internet / delivered	8.3%	66	6.0%	9	15.3%	14	3.9%	4	13.3%	12	1.3%	2	14.2%	21	5.6%	3	4.7%	2
Home catalogue	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	1.0%	1
(Don't know / can't remember)	6.4%	51	6.9%	10	14.4%	13	4.6%	4	5.6%	5	3.3%	4	4.7%	7	10.7%	6	2.3%	1
(Don't do this type of shopping)	34.7%	278	37.6%	53	33.6%	31	33.1%	30	29.1%	26	37.0%	47	36.2%	54	25.9%	16	41.7%	21
Weighted base:	800	142		92		90		90		128		148		60		51		
Sample:	800	100		100		100		100		100		100		100		100		

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q19 And the time before that, where did your household go to make a purchase of furniture, carpets, or soft household furnishings?</b>																		
<i>Not 'Don't do' or 'Don't know' at Q18</i>																		
Asda, Colliers Way, Tonypany	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	1.1%	0	0.0%	0
Asda, Coychurch Road, Bridgend	0.4%	2	0.0%	0	0.0%	0	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0
Sainsbury's, The Derwen, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Castle Street, Maesteg	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0
Aberkenfig (Valleys Gateway)	0.7%	3	1.2%	1	0.0%	0	0.9%	1	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	13.9%	66	19.0%	15	19.6%	9	32.8%	18	21.8%	13	5.2%	4	1.8%	2	1.8%	1	13.6%	4
Caerphilly	0.9%	4	0.0%	0	0.0%	0	0.0%	0	3.2%	2	2.8%	2	0.0%	0	0.0%	0	0.0%	0
Cardiff Bay	0.9%	4	0.0%	0	0.0%	0	0.9%	1	0.0%	0	3.5%	3	1.2%	1	0.0%	0	0.0%	0
Cardiff City Centre	9.3%	44	15.3%	12	9.3%	4	25.8%	14	6.2%	4	7.1%	5	2.1%	2	1.8%	1	4.5%	1
Cowbridge	1.9%	9	3.6%	3	0.0%	0	1.1%	1	0.0%	0	7.2%	6	0.0%	0	0.0%	0	0.0%	0
Hendreforgan	0.1%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kenfig Hill	0.4%	2	0.0%	0	0.0%	0	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lalestan/St Brides	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llantrisant	5.9%	28	9.9%	8	7.5%	4	2.1%	1	6.8%	4	6.6%	5	5.5%	5	3.4%	1	0.9%	0
Maesteg	2.2%	10	0.0%	0	0.0%	0	16.2%	9	0.0%	0	0.0%	0	0.0%	0	2.3%	1	1.0%	0
Merthyr Tydfil	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	2	0.0%	0
Ogmore Vale	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pencoed	0.6%	3	0.0%	0	0.0%	0	0.0%	0	2.9%	2	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Pontyclun	4.4%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.7%	15	4.0%	3	0.0%	0	7.2%	2
Pontycymer	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontypridd	3.7%	18	0.0%	0	0.0%	0	0.9%	1	0.9%	1	0.0%	0	16.4%	14	5.9%	2	0.0%	0
Port Talbot	1.4%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	2	16.9%	5
Porthcawl	1.0%	5	0.0%	0	10.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pyle	0.5%	3	1.0%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	1
Swansea City Centre	1.3%	6	3.6%	3	1.4%	1	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	1
Talbot Green Town Centre	1.3%	6	0.0%	0	0.0%	0	0.0%	0	1.8%	1	2.2%	2	3.1%	3	1.1%	0	1.5%	0
Tondu	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0
Tonypany	1.4%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.5%	7	0.0%	0	0.0%	0
Treorchy	2.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	3	17.1%	7	0.0%	0
Aberfan Shopping Centre, Port Talbot	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.2%	2
Bridgend Retail Park, Cowbridge Road, Bridgend	5.1%	24	8.3%	7	6.6%	3	1.1%	1	0.0%	0	11.6%	9	1.1%	1	4.7%	2	8.2%	2
Bridgend Shopping Centre, Cheapside, Bridgend	1.4%	7	8.3%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	0.9%	4	1.2%	1	0.0%	0	0.0%	0	3.2%	2	1.2%	1	0.0%	0	0.0%	0	1.0%	0
Picton Court Retail Park, Waterton, Bridgend	0.6%	3	0.0%	0	0.0%	0	0.0%	0	2.1%	1	1.2%	1	0.0%	0	1.2%	0	0.0%	0
Talbot Green Shopping Park	2.6%	12	1.0%	1	0.0%	0	0.0%	0	3.6%	2	5.7%	4	5.2%	5	1.1%	0	0.0%	0
Waterton Retail Park, Waterton Road, Bridgend	2.7%	13	8.3%	7	2.6%	1	1.1%	1	3.6%	2	0.0%	0	1.8%	2	1.1%	0	1.0%	0
B&Q, Ynysangharad Road, Pontypridd, CF37 4DA	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Brown Lennox Retail Park, Ynysangharad Road, Pontypridd, CF37 4DA	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Capital Shopping Park, Leckwith Road, Cardiff, CF11 8EG	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	3	0.0%	0	0.0%	0	0.0%	0
Cardiff - out of centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.2%	0	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Enterprise Retail Park, Nantyffin Road, Llansamlet, Swansea, SA7 9RF	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.3%	4	0.0%	0
Ikea, Ferry Road, Cardiff, CF11 0XR	3.0%	14	0.0%	0	4.2%	2	0.9%	1	7.4%	4	4.6%	4	1.8%	2	4.8%	2	0.9%	0
Marks & Spencer, Copthorne Way, Cardiff, CF5 6YZ	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	1.8%	1	0.0%	0
Porth	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	3	0.0%	0	0.0%	0

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Ton Pentre	0.7% 3	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	3.1% 3	1.1% 0	0.0% 0
Other, zone 1	0.5% 2	0.0% 0	4.2% 2	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 0
Other, zone 5	0.4% 2	1.0% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.1% 1	0.0% 0	0.0% 0
Other, zone 6	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.8% 1	0.0% 0
Other, outside area	1.5% 7	0.0% 0	2.4% 1	0.9% 1	0.0% 0	3.6% 3	1.8% 2	1.8% 1	0.9% 0
Internet / delivered	11.2% 53	8.4% 7	21.9% 10	9.5% 5	9.5% 6	3.4% 3	20.7% 18	5.2% 2	7.0% 2
Home catalogue	0.2% 1	0.0% 0	0.0% 0	1.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.9% 0
(Don't know / can't remember)	9.7% 46	9.8% 8	9.1% 4	1.1% 1	13.0% 8	5.5% 4	12.4% 11	15.7% 6	15.4% 4
Weighted base:	471	79	48	56	59	76	87	38	28
Sample:	462	52	49	53	60	64	61	62	61

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8							
<b>Q20 Now can you tell me where your household last made a purchase of DIY and decorating goods?</b>																
Aldi, Llynfi Road, Maesteg	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Asda, Coychurch Road, Bridgend	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, High Street, Treorchy	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Aberkenfig (Valleys Gateway)	0.5%	4	1.0%	1	0.0%	0	0.0%	0	2.8%	3	0.0%	0	0.0%	0	0.0%	0
Barry	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	12.5%	100	13.9%	20	8.2%	8	24.3%	22	21.5%	19	12.7%	16	7.4%	11	2.4%	1
Cardiff Bay	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0
Cardiff City Centre	1.9%	15	1.0%	1	5.0%	5	0.0%	0	0.0%	0	7.4%	9	0.0%	0	0.0%	0
Cowbridge	1.2%	9	2.7%	4	0.6%	1	0.0%	0	0.0%	0	3.9%	5	0.0%	0	0.0%	0
Kenfig Hill	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	8.5%
Llantrisant	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	3	1.7%	3	1.2%	1
Maesteg	3.9%	31	0.0%	0	0.0%	0	32.1%	29	0.0%	0	0.0%	0	0.0%	0	3.3%	2
Margam	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.6%
Merthyr Tydfil	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3	2.4%	1
Newport City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Pencoed	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.6%	1	0.0%	0	0.0%	0
Pontyclun	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	5	0.0%	0	0.0%	4.0%
Pontycymer	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Pontypridd	4.2%	34	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	4	19.0%	28	3.3%	2
Port Talbot	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2
Porthcawl	0.6%	4	0.0%	0	4.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pyle	3.2%	25	0.6%	1	16.6%	15	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	17.2%
Swansea City Centre	0.4%	3	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Talbot Green Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0
Tonypanyd	1.5%	12	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	7.4%	11	0.8%	0
Treorchy	1.5%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	15.2%	9
Aberfan Shopping Centre, Port Talbot	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	4.5%
Bridgend Retail Park, Cowbridge Road, Bridgend	11.1%	89	25.8%	37	19.9%	18	0.0%	0	13.8%	12	12.5%	16	1.3%	2	3.2%	2
Bridgend Shopping Centre, Cheapside, Bridgend	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Picton Court Retail Park, Waterton, Bridgend	0.6%	5	2.4%	3	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.8%	0
Talbot Green Shopping Park	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0
Waterton Retail Park, Waterton Road, Bridgend	10.0%	80	6.7%	10	15.6%	14	9.2%	8	23.7%	21	8.0%	10	4.7%	7	7.0%	4
B&Q, Cowbridge Road West, Culverhouse Cross, Cardiff, CF5 5TG	2.4%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.1%	19	0.0%	0	0.0%	0
B&Q, Ynysangharad Road, Pontypridd, CF37 4DA	2.2%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.8%	13	7.5%	4
Brown Lennox Retail Park, Ynysangharad Road, Pontypridd, CF37 4DA	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	8.7%	5	0.0%	0
Gelli	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Morfa Shopping Park, Brunel Way, Bon-y-maen, Swansea, SA1 7BP	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Porth	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Ton Pentre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Other, zone 1	0.2%	2	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 2	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 5	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0
Other, outside area	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.6%	1	3.2%	4	1.5%	2	2.3%	1
Internet / delivered	1.5%	12	1.2%	2	3.4%	3	0.0%	0	1.0%	1	1.3%	2	2.1%	3	1.2%	1
(Don't know / can't remember)	2.4%	20	2.3%	3	2.9%	3	0.6%	1	2.7%	2	1.9%	2	2.2%	3	7.4%	4
(Don't do this type of shopping)	30.2%	242	40.1%	57	22.2%	20	32.5%	29	31.3%	28	15.3%	20	37.2%	55	25.5%	15
Weighted base:	800		142		92		90		90		128		148		60	
Sample:	800		100		100		100		100		100		100		100	

Column %ges.



# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q21 And the time before that, where did your household go to make a purchase of DIY and decorating goods?</b>																		
<i>Not 'Don't do' or 'Don't know' at Q20</i>																		
Aldi, Llynfi Road, Maesteg	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberkenfig (Valleys Gateway)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Barry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	17.9%	97	22.1%	18	9.0%	6	37.2%	22	33.6%	20	12.8%	14	11.4%	10	3.5%	1	14.6%	5
Cardiff Bay	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	3.3%	18	1.7%	1	10.0%	7	0.0%	0	0.0%	0	8.8%	9	0.0%	0	0.0%	0	0.0%	0
Cowbridge	1.6%	9	4.6%	4	0.0%	0	0.0%	0	0.0%	0	4.6%	5	0.0%	0	0.0%	0	0.0%	0
Cwmbran	0.1%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kenfig Hill	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	2
Llantrisant	1.2%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	1.8%	2	1.7%	1	0.0%	0
Maesteg	3.1%	17	0.0%	0	0.0%	0	24.9%	15	0.0%	0	0.0%	0	0.0%	0	3.9%	2	0.0%	0
Merthyr Tydfil	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0
Newport City Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.2%	1	0.0%	0	0.0%	0
Pencoed	0.5%	3	0.0%	0	0.0%	0	0.0%	0	2.0%	1	1.5%	2	0.0%	0	0.0%	0	0.0%	0
Pontyclun	1.6%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	7	0.0%	0	0.0%	0	6.2%	2
Pontycymer	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Pontypridd	6.1%	33	0.0%	0	0.0%	0	1.0%	1	0.0%	0	5.6%	6	27.7%	25	3.7%	1	0.0%	0
Port Talbot	1.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.4%	3	6.9%	2
Porthcawl	0.2%	1	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pyle	4.8%	26	2.1%	2	20.4%	14	3.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.2%	8
Swansea City Centre	0.7%	4	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	2.7%	1	5.0%	2
Talbot Green Town Centre	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Tonypanyd	1.8%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.6%	8	4.5%	2	0.0%	0
Tonyrefail	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Treorchy	1.4%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	13.5%	5	0.0%	0
Aberfan Shopping Centre, Port Talbot	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	2
Bridgend Retail Park, Cowbridge Road, Bridgend	15.9%	86	41.9%	34	29.5%	20	0.0%	0	25.1%	15	10.8%	11	1.0%	1	3.7%	1	7.7%	3
Bridgend Shopping Centre, Cheapside, Bridgend	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0
Picton Court Retail Park, Waterton, Bridgend	1.1%	6	3.1%	3	2.9%	2	0.0%	0	0.0%	0	0.9%	1	0.0%	0	1.2%	0	0.0%	0
Talbot Green Shopping Park	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0	1.0%	0	0.0%	0
Waterton Retail Park, Waterton Road, Bridgend	15.8%	85	18.1%	15	17.0%	12	29.4%	18	27.5%	16	7.3%	8	9.5%	8	7.0%	3	17.5%	6
B&Q, Cowbridge Road West, Culverhouse Cross, Cardiff, CF5 5TG	4.0%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.5%	22	0.0%	0	0.0%	0	0.0%	0
B&Q, Ynysangharad Road, Pontypridd, CF37 4DA	2.8%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.1%	12	7.9%	3	0.0%	0
Brown Lennox Retail Park, Ynysangharad Road, Pontypridd, CF37 4DA	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	1.6%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	19.2%	8	0.0%	0
Gelli	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0
Morfa Shopping Park, Brunel Way, Bon-y-maen, Swansea, SA1 7BP	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	2.9%	1
Ton Pentre	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	3	0.0%	0	0.0%	0
Other, zone 1	0.9%	5	3.1%	3	1.7%	1	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 2	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 4	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 5	0.6%	3	0.0%	0	0.8%	1	0.0%	0	0.0%	0	2.8%	3	0.0%	0	0.0%	0	0.0%	0
Other, outside area	1.5%	8	0.0%	0	0.0%	0	0.8%	1	0.0%	0	3.4%	4	3.5%	3	2.7%	1	0.0%	0
Internet / delivered (Don't know / can't remember)	1.8%	10	1.0%	1	2.6%	2	0.0%	0	5.3%	3	0.9%	1	2.2%	2	1.7%	1	1.3%	0
	2.9%	16	2.1%	2	3.1%	2	0.0%	0	2.5%	1	0.0%	0	6.3%	6	10.7%	4	1.7%	1
Weighted base:		539		82		69		60		59		106		90		40		33
Sample:		539		61		70		59		64		85		66		65		69

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q22 Can you tell me where you or your household last made a purchase of electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones or computers?</b>																		
Aldi, Brackla Street, Bridgend	0.3%	2	0.0%	0	0.7%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Colliers Way, Tonypany	1.4%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	9	2.9%	2	0.0%	0
Asda, Coychurch Road, Bridgend	0.5%	4	0.0%	0	0.0%	0	0.0%	0	4.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	3
Lidl, High Street, Treorchy	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	3.0%	24	2.7%	4	8.5%	8	0.0%	0	2.1%	2	0.0%	0	5.1%	7	1.2%	1	4.0%	2
Tesco Extra, Green Park, Talbot Green, Pontyclun	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	6	1.1%	2	0.7%	0	0.0%	0
Aberkenfig (Valleys Gateway)	0.4%	3	0.0%	0	2.2%	2	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Barry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	8.4%	67	11.2%	16	3.8%	4	22.7%	20	13.8%	12	3.7%	5	5.1%	7	1.2%	1	4.4%	2
Cardiff Bay	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	1.1%	2	0.0%	0	0.0%	0
Cardiff City Centre	4.6%	36	0.0%	0	8.1%	7	2.8%	2	2.0%	2	14.6%	19	2.9%	4	2.5%	1	0.5%	0
Cowbridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Dolau	0.5%	4	0.0%	0	0.0%	0	4.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llantrisant	0.7%	6	0.0%	0	5.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Maesteg	1.0%	8	0.0%	0	0.0%	0	7.5%	7	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0
Merthyr Tydfil	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	3	2.5%	1	0.0%	0
Pencoed	0.2%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.6%	1	0.0%	0	0.0%	0
Pontypridd	2.8%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	12.7%	19	3.5%	2	0.0%	0
Port Talbot	1.7%	13	0.0%	0	1.1%	1	0.0%	0	0.0%	0	4.9%	6	0.0%	0	2.5%	1	9.0%	5
Porthcawl	0.5%	4	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea City Centre	0.8%	6	0.0%	0	0.6%	1	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	0	6.8%	3
Talbot Green Town Centre	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	4	0.6%	1	1.2%	1	0.0%	0
Tonypany	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0
Treorchy	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.3%	1	0.0%	0
Aberfan Shopping Centre, Port Talbot	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	13.6%	109	30.3%	43	17.6%	16	6.1%	5	16.0%	14	6.9%	9	0.6%	1	5.5%	3	32.5%	16
Bridgend Shopping Centre, Cheapside, Bridgend	0.3%	3	0.0%	0	1.1%	1	0.7%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Glamorgan Vale Retail Park, Talbot Green	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.5%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	0.8%	6	2.3%	3	0.7%	1	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	0
Picton Court Retail Park, Waterton, Bridgend	0.3%	3	0.6%	1	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rhiw Shopping Centre, Nolton Street, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Talbot Green Shopping Park	1.1%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	5	2.0%	3	0.7%	0	0.0%	0
Waterton Retail Park, Waterton Road, Bridgend	0.3%	3	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Abroad	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Brown Lennox Retail Park, Ynysangharad Road, Pontypridd, CF37 4DA	1.5%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.4%	9	3.8%	2	0.0%	0
Capital Shopping Park, Leckwith Road, Cardiff, CF11 8EG	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Cardiff - out of centre	1.0%	8	0.0%	0	0.6%	1	0.0%	0	0.0%	0	6.0%	8	0.0%	0	0.0%	0	0.0%	0
Currys PC World, Port Road, Culver House Cross, Cardiff, CF5 6XW	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	6	0.0%	0	0.0%	0	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	13.3%	8	0.0%	0
Marks & Spencer, Copthorne Way, Cardiff, CF5 6YZ	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morfa Shopping Park, Brunel Way, Bon-y-maen,	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0

Column %ges.

# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
Swansea, SA1 7BP																		
Other, outside area	0.5%	4	0.0%	0	0.6%	1	0.0%	0	0.0%	0								
Internet / delivered	16.4%	131	15.1%	21	12.4%	11	21.5%	19	17.7%	16	16.8%	22	19.8%	29	13.7%	8	8.3%	4
Home catalogue	0.9%	8	0.0%	0	1.1%	1	1.2%	1	2.1%	2	0.0%	0	0.0%	0	2.5%	1	4.0%	2
(Don't know / can't remember)	2.7%	22	2.5%	4	6.2%	6	2.2%	2	1.9%	2	2.9%	4	0.7%	1	6.1%	4	0.5%	0
(Don't do this type of shopping)	27.3%	218	35.4%	50	22.5%	21	24.7%	22	35.6%	32	21.0%	27	26.2%	39	27.6%	17	21.7%	11
Weighted base:	800	142	92	90	90	128	148	60	51									
Sample:	800	100	100	100	100	100	100	100	100									

# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
<b>Q23 And the time before that, where you or your household last made a purchase of electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones or computers?</b>									
<i>Not 'Don't do' or 'Don't know' at Q22</i>									
Aldi, Brackla Street, Bridgend	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%
Asda, Colliers Way, Tonypany	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%
Asda, Coychurch Road, Bridgend	0.3%	1	0.0%	0	0.0%	0	2.6%	1	0.0%
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%
Lidl, Bridgend Retail Park, Bridgend	0.1%	1	0.0%	0	0.0%	0	1.1%	1	0.0%
Sainsbury's, The Derwen, Bridgend	0.1%	1	0.0%	0	0.0%	0	1.1%	1	0.0%
Tesco Extra, Cowbridge Road, Bridgend	4.4%	25	11.7%	10	2.9%	2	0.0%	0	5.5%
Tesco Extra, Green Park, Talbot Green, Pontyclun	2.1%	12	0.0%	0	0.0%	0	0.0%	0	9.0%
Tesco, Brewery Lane, Bridgend	0.2%	1	1.1%	1	0.0%	0	0.0%	0	0.0%
Aberkenfig (Valleys Gateway)	0.4%	2	0.0%	0	0.9%	1	0.9%	1	2.2%
Bridgend Town Centre	11.7%	65	23.9%	21	8.9%	6	24.5%	16	14.2%
Cardiff City Centre	5.5%	31	1.1%	1	6.4%	4	2.6%	2	2.1%
Cowbridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%
Dolau	0.7%	4	0.0%	0	0.0%	0	6.2%	4	0.0%
Kenfig Hill	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Llantrisant	2.2%	12	0.0%	0	7.0%	5	0.0%	0	1.7%
Maesteg	1.5%	8	0.0%	0	0.0%	0	12.6%	8	0.0%
Margam	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%
Merthyr Tydfil	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%
Pencoed	0.3%	2	0.0%	0	0.0%	0	2.7%	2	0.0%
Pontyclun	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.7%
Pontypridd	2.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%
Port Talbot	1.9%	11	0.0%	0	0.0%	0	0.0%	0	6.5%
Porthcawl	0.4%	2	0.0%	0	2.6%	2	0.0%	0	0.0%
Pyle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Swansea City Centre	1.2%	7	0.0%	0	0.9%	1	2.6%	2	0.0%
Talbot Green Town Centre	0.7%	4	0.0%	0	0.0%	0	0.0%	0	3.4%
Tonypany	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%
Tonyrefail	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.9%
Treorchy	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%
Aberfan Shopping Centre, Port Talbot	0.2%	1	0.0%	0	0.9%	1	0.0%	0	0.0%
Bridgend Retail Park, Cowbridge Road, Bridgend	17.1%	96	35.7%	32	30.4%	20	5.9%	4	18.6%
Bridgend Shopping Centre, Cheapside, Bridgend	0.6%	3	0.9%	1	1.5%	1	0.9%	1	0.0%
Glamorgan Vale Retail Park, Talbot Green	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%
Mcarthurglen Designer Outlet, Derwen, Bridgend	0.5%	3	1.6%	1	1.0%	1	0.9%	1	0.0%
Picton Court Retail Park, Waterton, Bridgend	0.5%	3	0.9%	1	0.0%	0	0.0%	0	3.4%
Rhiw Shopping Centre, Nolton Street, Bridgend	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.9%
Talbot Green Shopping Park	0.9%	5	0.0%	0	0.0%	0	0.0%	0	2.3%
Waterton Retail Park, Waterton Road, Bridgend	0.6%	3	0.9%	1	3.0%	2	0.0%	0	0.0%
Brown Lennox Retail Park, Ynysangharad Road, Pontypridd, CF37 4DA	2.6%	15	0.0%	0	0.0%	0	0.0%	0	1.4%
Capital Shopping Park, Leckwith Road, Cardiff, CF11 8EG	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.9%
Currys PC World, Port Road, Culver House Cross, Cardiff, CF5 6XW	1.2%	7	0.0%	0	0.0%	0	0.0%	0	7.0%
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	1.6%	9	0.0%	0	0.0%	0	0.0%	0	0.9%

Column %ges.

# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
Morfa Shopping Park, Brunel Way, Bon-y-maen, Swansea, SA1 7BP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Other, outside area	1.1%	6	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	3	5.2%	2	0.0%	0
Internet / delivered	23.1%	129	20.7%	18	28.0%	18	28.4%	19	29.8%	17	16.5%	16	26.3%	28	18.1%	7	14.1%	6
Home catalogue	1.6%	9	0.0%	0	1.5%	1	2.5%	2	3.4%	2	0.0%	0	0.0%	0	6.3%	3	5.2%	2
TV / Interactive shopping	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
(Don't know / can't remember)	8.4%	47	0.0%	0	4.1%	3	8.5%	6	14.3%	8	13.4%	13	8.9%	10	18.1%	7	2.7%	1
Weighted base:	560	88	66	66	56	98	108	40	39									
Sample:	540	60	66	63	58	77	70	66	80									

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q24 Can you tell me where you or your household last made a purchase of domestic appliances, such as washing machines, fridges or cookers?</b>																		
Asda, Colliers Way, Tonypany	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	5	0.0%	0	0.0%	0
Asda, Coychurch Road, Bridgend	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	0.3%	2	0.0%	0	0.6%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Tesco Extra, Green Park, Talbot Green, Pontyclun	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	8	0.6%	1	0.0%	0	0.0%	0
Aberkenfig (Valleys Gateway)	0.5%	4	1.7%	2	0.0%	0	0.6%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	9.5%	76	17.9%	25	8.4%	8	21.9%	20	6.9%	6	9.8%	13	0.7%	1	0.0%	0	5.8%	3
Cardiff City Centre	2.9%	23	0.6%	1	4.9%	4	1.1%	1	2.3%	2	9.8%	13	0.7%	1	1.3%	1	0.6%	0
Llantrisant	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.6%	1	2.1%	3	2.4%	4	2.5%	1	0.0%	0
Maesteg	1.1%	9	0.0%	0	0.0%	0	7.5%	7	0.0%	0	0.0%	0	0.0%	0	3.0%	2	0.0%	0
Merthyr Tydfil	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	2.6%	2	0.0%	0
Neath	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	4.0%	2
Newport City Centre	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	5	0.6%	1	0.0%	0	0.0%	0
Pontycymer	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Pontypridd	2.6%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.9%	19	2.9%	2	0.0%	0
Port Talbot	1.1%	9	0.0%	0	0.0%	0	4.6%	4	0.0%	0	0.0%	0	0.0%	0	2.0%	1	7.0%	4
Porthcawl	0.9%	7	0.0%	0	7.4%	7	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pyle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Swansea City Centre	0.3%	2	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	1.4%	1
Talbot Green Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.7%	0	0.0%	0
Treorchy	1.3%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	5	9.9%	6	0.0%	0
Aberfan Shopping Centre, Port Talbot	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	15.2%	121	24.7%	35	27.7%	26	8.8%	8	20.3%	18	11.9%	15	1.3%	2	6.2%	4	27.5%	14
Bridgend Shopping Centre, Cheapside, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glamorgan Vale Retail Park, Talbot Green	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Picton Court Retail Park, Waterton, Bridgend	0.2%	1	0.6%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Talbot Green Shopping Park	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	3	2.0%	3	1.2%	1	0.0%	0
Waterton Retail Park, Waterton Road, Bridgend	0.3%	3	0.0%	0	1.4%	1	0.0%	0	0.6%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Brown Lennox Retail Park, Ynysangharad Road, Pontypridd, CF37 4DA	1.3%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	5.1%	8	3.8%	2	0.0%	0
Cardiff - out of centre	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	6	0.0%	0	0.0%	0	0.0%	0
Currys PC World, Port Road, Culver House Cross, Cardiff, CF5 6XW	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	5	0.0%	0	0.0%	0	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	10.0%	6	0.0%	0
Enterprise Retail Park, Nantyllyn Road, Llansamlet, Swansea, SA7 9RF	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Ikea, Ferry Road, Cardiff, CF11 0XR	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0
Morfa Shopping Park, Brunel Way, Bon-y-maen, Swansea, SA1 7BP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Porth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Other, zone 8	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Other, outside area	0.5%	4	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	1.2%	1	0.5%	0
Internet / delivered	20.6%	165	15.1%	21	21.2%	19	25.6%	23	25.6%	23	21.3%	27	22.8%	34	12.1%	7	19.3%	10
Home catalogue	0.7%	5	0.0%	0	0.0%	0	0.6%	1	2.1%	2	0.0%	0	0.0%	0	4.2%	3	0.6%	0
TV / Interactive shopping	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	4.5%	36	2.7%	4	9.5%	9	0.7%	1	1.7%	2	2.6%	3	7.5%	11	10.4%	6	0.9%	0
(Don't do this type of shopping)	27.1%	217	34.5%	49	18.9%	17	26.9%	24	33.7%	30	16.4%	21	32.0%	47	21.3%	13	29.5%	15

by Zone  
Weighted:

## Bridgend Borough Retail Study for Peter Brett Associates

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February 2019

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	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Weighted base:	800	142	92	90	90	128	148	60	51
Sample:	800	100	100	100	100	100	100	100	100

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q25 And the time before that, where you or your household last made a purchase of domestic appliances, such as washing machines, fridges or cookers?</b>																		
<i>Not 'Don't do' or 'Don't know' at Q24</i>																		
Asda, Colliers Way, Tonypany	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	0.2%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	1.8%	10	8.2%	7	0.0%	0	0.0%	0	4.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Green Park, Talbot Green, Pontyclun	1.6%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.4%	8	1.0%	1	0.0%	0	0.0%	0
Tesco, Brewery Lane, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberkenfig (Valleys Gateway)	0.5%	3	1.8%	2	0.0%	0	0.8%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Barry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	11.6%	63	23.5%	21	8.1%	5	25.2%	16	11.8%	7	10.3%	11	1.2%	1	0.0%	0	5.8%	2
Caerphilly	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff Bay	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Cardiff City Centre	3.5%	19	1.8%	2	1.9%	1	2.1%	1	3.1%	2	10.7%	11	1.2%	1	1.0%	0	1.7%	1
Llantrisant	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.9%	1	1.3%	1	2.3%	2	2.7%	1	0.0%	0
Maesteg	0.5%	3	0.0%	0	0.0%	0	4.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merthyr Tydfil	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.8%	1	0.0%	0
Neath	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	2
Newport City Centre	0.1%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0
Pontycymer	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Pontypridd	4.1%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.0%	21	4.3%	2	0.0%	0
Port Talbot	1.7%	9	0.0%	0	1.0%	1	6.3%	4	0.0%	0	0.0%	0	0.0%	0	3.7%	1	8.5%	3
Porthcawl	0.7%	4	0.0%	0	5.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pyle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Swansea City Centre	1.0%	6	0.0%	0	0.0%	0	3.0%	2	0.0%	0	0.0%	0	0.0%	0	5.2%	2	4.5%	2
Talbot Green Town Centre	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0	2.0%	1	0.7%	0
Treorchy	1.8%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.6%	6	10.3%	4	0.0%	0
Aberfan Shopping Centre, Port Talbot	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	19.8%	108	36.1%	32	35.2%	23	5.3%	3	26.2%	15	16.8%	17	2.1%	2	5.6%	2	35.4%	12
Bridgend Shopping Centre, Cheapside, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Picton Court Retail Park, Waterton, Bridgend	0.3%	1	0.9%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Talbot Green Shopping Park	1.3%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	3	4.3%	4	0.0%	0	0.0%	0
Waterton Retail Park, Waterton Road, Bridgend	0.8%	4	0.0%	0	4.5%	3	0.0%	0	0.9%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Brown Lennox Retail Park, Ynysangharad Road, Pontypridd, CF37 4DA	2.8%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	15.1%	14	2.0%	1	0.0%	0
Cardiff - out of centre	1.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	6	0.0%	0	0.0%	0	0.0%	0
Currys PC World, Port Road, Culver House Cross, Cardiff, CF5 6XW	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	4	0.0%	0	0.0%	0	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	1.3%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	12.9%	5	0.0%	0
Enterprise Retail Park, Nantyyffin Road, Llansamlet, Swansea, SA7 9RF	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0
Morfa Shopping Park, Brunel Way, Bon-y-maen, Swansea, SA1 7BP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1
Other, outside area	0.7%	4	1.6%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	1.7%	1	0.7%	0
Internet / delivered	30.2%	166	21.1%	19	33.7%	22	44.3%	29	31.5%	18	27.3%	28	32.9%	29	24.5%	10	27.5%	10
Home catalogue	0.9%	5	0.0%	0	0.0%	0	1.7%	1	3.3%	2	0.0%	0	0.0%	0	5.2%	2	0.0%	0
(Don't know / can't remember)	6.7%	37	3.9%	4	9.9%	7	4.9%	3	13.6%	8	4.2%	4	5.1%	5	12.0%	5	5.7%	2
Weighted base:		548		89		66		65		58		104		89		41		35
Sample:		546		60		69		64		61		77		67		75		73



# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q26 Can you tell me where you or your household last made a purchase of health, beauty or chemist items?</b>																		
Aldi, Brackla Street, Bridgend	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0
Asda, Colliers Way, Tonypany	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	2.0%	3	0.7%	0	0.0%	0
Asda, Coychurch Road, Bridgend	1.2%	10	3.5%	5	0.7%	1	0.6%	1	3.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	3
Lidl, High Street, Treorchy	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Sainsbury's, The Derwen, Bridgend	0.3%	2	1.0%	1	0.6%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	2.7%	22	6.7%	10	9.9%	9	0.0%	0	1.2%	1	1.7%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Green Park, Talbot Green, Pontyclun	1.2%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	6	2.1%	3	0.0%	0	0.0%	0
Tesco, Brewery Lane, Bridgend	0.5%	4	3.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Castle Street, Maesteg	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0
Aberkenfig (Valleys Gateway)	0.3%	3	0.0%	0	0.0%	0	1.0%	1	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	17.5%	140	52.3%	74	15.5%	14	13.8%	12	31.8%	29	5.5%	7	1.1%	2	0.0%	0	3.9%	2
Cardiff City Centre	3.5%	28	3.2%	5	2.1%	2	1.6%	1	2.8%	3	7.8%	10	3.7%	5	3.2%	2	0.0%	0
Cowbridge	1.7%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.4%	13	0.0%	0	0.0%	0	0.5%	0
Kenfig Hill	1.6%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.1%	13
Lalestan/St Brides	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Llantrisant	1.7%	14	0.0%	0	0.0%	0	0.0%	0	2.1%	2	3.3%	4	4.5%	7	1.2%	1	0.0%	0
Maesteg	5.3%	42	0.0%	0	0.7%	1	45.0%	40	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.6%	0
Margam	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Merthyr Tydfil	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.7%	0	0.0%	0
Neath	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	0.6%	0
Ogmore Vale	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pencoed	2.2%	18	0.0%	0	0.0%	0	0.0%	0	13.5%	12	3.8%	5	0.6%	1	0.0%	0	0.0%	0
Pontyclun	1.2%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.8%	10	0.0%	0	0.0%	0	0.0%	0
Pontypridd	1.3%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.2%	11	0.0%	0	0.0%	0
Port Talbot	2.0%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	11.6%	7	16.2%	8
Porthcawl	5.9%	48	0.0%	0	42.0%	39	0.0%	0	0.6%	1	0.6%	1	0.6%	1	0.0%	0	13.2%	7
Pyle	0.3%	2	0.0%	0	1.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Swansea City Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	1.2%	1	1.4%	1
Talbot Green Town Centre	5.0%	40	0.0%	0	0.0%	0	0.0%	0	1.6%	1	26.4%	34	2.9%	4	0.0%	0	0.5%	0
Tondu	0.5%	4	0.0%	0	0.0%	0	2.7%	2	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	0
Tonypany	2.7%	21	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	14.1%	21	0.0%	0	0.0%	0
Tonyrefail	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3	0.0%	0	0.0%	0
Treorchy	2.4%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	3	27.7%	17	0.0%	0
Bridgend Shopping Centre, Cheapside, Bridgend	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glamorgan Vale Retail Park, Talbot Green	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	5	0.0%	0	0.0%	0	0.0%	0
Mcarthurlen Designer Outlet, Derwen, Bridgend	0.3%	2	0.7%	1	0.7%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Picton Court Retail Park, Waterton, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Talbot Green Shopping Park	1.8%	14	0.0%	0	0.0%	0	0.0%	0	6.6%	6	5.4%	7	0.6%	1	1.2%	1	0.0%	0
Gelli	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	7	0.0%	0	0.0%	0
Porth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Ton Pentre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Treherbert	1.5%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	18.5%	11	0.0%	0
Other, zone 1	0.3%	3	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Other, zone 2	0.3%	2	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 4	0.7%	6	0.0%	0	0.0%	0	0.0%	0	6.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	4	0.0%	0	0.0%	0
Other, zone 7	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.7%	5	4.0%	2
Other, outside area	2.2%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	3	9.8%	14	0.0%	0	0.0%	0
Internet / delivered	5.2%	41	6.7%	10	6.6%	6	9.8%	9	1.2%	1	1.3%	2	6.5%	10	0.7%	0	8.3%	4
Home catalogue	0.2%	2	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
TV / interactive shopping	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
(Don't know / can't remember)	2.0%	16	0.0%	0	7.9%	7	1.1%	1	1.0%	1	0.6%	1	1.1%	2	3.7%	2	4.5%	2
(Don't do this type of shopping)	18.1%	145	20.8%	30	10.1%	9	22.6%	20	19.1%	17	9.9%	13	28.8%	42	12.3%	7	11.9%	6
Weighted base:	800	142	92	90	90	128	148	60	51									
Sample:	800	100	100	100	100	100	100	100	100									

Column %ges.

by Zone  
Weighted:

# Bridgend Borough Retail Study for Peter Brett Associates

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Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
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# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

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	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q27 And the time before that, where did you or your household go to make a purchase of health, beauty or chemist items?</b>																		
<i>Not 'Don't do' or 'Don't know' at Q26</i>																		
Aldi, Brackla Street, Bridgend	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Castle Street, Maesteg	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0
Asda, Colliers Way, Tonypandy	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.8%	2	2.2%	1	0.0%	0
Asda, Coychurch Road, Bridgend	0.9%	6	3.6%	4	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	2
Lidl, Bridgend Retail Park, Bridgend	0.5%	3	0.0%	0	0.0%	0	0.0%	0	2.2%	2	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, High Street, Treorchy	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Sainsbury's, The Derwen, Bridgend	0.9%	6	4.1%	5	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Tesco Extra, Cowbridge Road, Bridgend	2.7%	17	8.0%	9	7.7%	6	0.0%	0	1.5%	1	0.7%	1	0.0%	0	0.0%	0	0.6%	0
Tesco Extra, Green Park, Talbot Green, Pontyclun	2.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.4%	14	2.1%	2	0.0%	0	0.0%	0
Tesco, Brewery Lane, Bridgend	0.9%	6	5.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Castle Street, Maesteg	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberkenfig (Valleys Gateway)	0.3%	2	0.0%	0	0.0%	0	1.3%	1	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	19.4%	124	58.7%	66	17.4%	13	11.9%	8	42.7%	31	3.8%	4	0.0%	0	0.0%	0	4.1%	2
Cardiff City Centre	8.3%	53	5.8%	6	8.2%	6	8.1%	6	7.1%	5	17.5%	20	6.5%	7	4.2%	2	1.3%	1
Cowbridge	2.8%	18	2.5%	3	0.0%	0	0.0%	0	0.0%	0	12.9%	15	0.0%	0	0.0%	0	0.0%	0
Kenfig Hill	2.4%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	36.1%	15
Llantrisant	1.7%	11	0.0%	0	0.0%	0	1.7%	1	2.5%	2	2.5%	3	3.9%	4	1.4%	1	0.0%	0
Maesteg	6.6%	42	0.0%	0	0.0%	0	60.7%	42	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Merthyr Tydfil	0.5%	3	0.0%	0	0.8%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	3.6%	2	0.0%	0
Neath	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	2	0.7%	0
Pencoed	2.7%	17	0.0%	0	0.0%	0	0.0%	0	15.8%	11	4.2%	5	0.9%	1	0.0%	0	0.0%	0
Pontyclun	1.3%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.2%	8	0.0%	0	0.0%	0	0.0%	0
Pontypridd	1.9%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.3%	12	0.9%	0	0.0%	0
Port Talbot	2.6%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	13.7%	7	20.6%	9
Porthcawl	6.2%	39	0.0%	0	46.2%	35	0.0%	0	0.8%	1	0.7%	1	0.0%	0	0.0%	0	7.6%	3
Pyle	0.4%	3	0.0%	0	1.3%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Swansea City Centre	0.7%	5	0.0%	0	0.0%	0	6.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Talbot Green Town Centre	4.2%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.7%	23	3.6%	4	0.8%	0	0.6%	0
Tondu	0.5%	3	0.0%	0	0.0%	0	3.5%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tonypandy	3.1%	20	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	18.4%	19	0.0%	0	0.0%	0
Tonyrefail	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	3	0.0%	0	0.0%	0
Treorchy	4.1%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.7%	11	30.4%	15	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Bridgend Shopping Centre, Cheapside, Bridgend	0.5%	3	0.8%	1	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glamorgan Vale Retail Park, Talbot Green	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	5	0.0%	0	0.0%	0	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	1.0%	6	4.6%	5	0.9%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Picton Court Retail Park, Waterton, Bridgend	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Talbot Green Shopping Park	2.6%	17	0.0%	0	0.0%	0	0.0%	0	8.2%	6	5.9%	7	3.2%	3	1.4%	1	0.0%	0
Gelli	0.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	6	0.0%	0	0.0%	0
Morfa Shopping Park, Brunel Way, Bon-y-maen, Swansea, SA1 7BP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Porth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Ton Pentre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	3	0.0%	0	0.0%	0
Treherbert	1.6%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	18.3%	9	0.0%	0
Other, zone 1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Other, zone 2	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 4	0.9%	6	0.0%	0	0.0%	0	0.0%	0	8.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	3	0.0%	0	0.0%	0
Other, zone 7	1.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.3%	5	4.8%	2
Other, outside area	2.4%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	3	11.5%	12	0.8%	0	0.0%	0
Internet / delivered	4.8%	31	4.2%	5	11.8%	9	4.2%	3	0.8%	1	2.3%	3	5.6%	6	0.8%	0	11.6%	5
Home catalogue	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

by Zone  
Weighted:

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	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	
TV / Interactive shopping	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0
(Don't know / can't remember)	1.4%	9	1.6%	2	1.3%	1	0.0%	0	0.8%	1
Weighted base:	639	112	75	68	72	115	104	50	42	
Sample:	636	79	81	68	77	90	79	82	80	

Weighted:

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	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q28 Can you tell me where you or your household last made a purchase of recreational goods such as sports equipment, bicycles, musical instruments or toys?</b>																		
Aldi, Brackla Street, Bridgend	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0		
Asda, Colliers Way, Tonypany	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Asda, Coychurch Road, Bridgend	0.3%	2	1.0%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	2
Lidl, High Street, Treorchy	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	0.7%	6	0.7%	1	5.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Tesco Extra, Green Park, Talbot Green, Pontyclun	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	1.2%	1	0.0%	0
Tesco, Brewery Lane, Bridgend	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberkenfig (Valleys Gateway)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	0
Bridgend Town Centre	5.8%	47	3.2%	5	6.4%	6	4.9%	4	22.4%	20	3.1%	4	2.3%	3	0.0%	0	8.6%	4
Cardiff City Centre	3.7%	30	0.0%	0	10.8%	10	7.2%	6	4.0%	4	2.7%	3	3.2%	5	1.8%	1	1.4%	1
Cowbridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llantrisant	0.9%	7	2.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	3	1.2%	1	0.0%	0
Llantwit Major	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maesteg	0.4%	3	0.0%	0	0.0%	0	3.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merthyr Tydfil	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Neath	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Penarth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Pontypridd	1.0%	8	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	3.9%	6	0.7%	0	0.0%	0
Port Talbot	0.6%	5	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	4	0.6%	0
Porthcawl	0.2%	2	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Pyle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Swansea City Centre	1.3%	10	2.0%	3	0.0%	0	3.6%	3	0.0%	0	0.7%	1	0.6%	1	1.2%	1	3.2%	2
Talbot Green Town Centre	2.2%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.1%	16	0.7%	1	1.3%	1	0.0%	0
Tondu	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tonypany	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.7%	0	0.0%	0
Treorchy	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	1.9%	15	5.5%	8	0.0%	0	1.3%	1	0.7%	1	3.4%	4	0.0%	0	0.0%	0	2.2%	1
Glamorgan Vale Retail Park, Talbot Green	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	2.7%	21	6.1%	9	1.7%	2	1.0%	1	6.5%	6	1.4%	2	0.0%	0	1.5%	1	3.2%	2
Talbot Green Shopping Park	2.8%	22	0.0%	0	0.0%	0	0.0%	0	1.6%	1	10.9%	14	4.1%	6	0.0%	0	1.8%	1
Waterton Retail Park, Waterton Road, Bridgend	0.6%	5	0.0%	0	3.4%	3	0.7%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Capital Shopping Park, Leckwith Road, Cardiff, CF11 8EG	1.0%	8	0.0%	0	2.3%	2	0.0%	0	2.1%	2	3.2%	4	0.0%	0	0.0%	0	0.0%	0
Cardiff - out of centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.5%	1	0.0%	0
Enterprise Retail Park, Nantyffin Road, Llansamlet, Swansea, SA7 9RF	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Porth	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3	0.0%	0	0.0%	0
Other, outside area	0.7%	6	0.0%	0	0.6%	1	0.0%	0	0.0%	0	2.9%	4	1.1%	2	0.0%	0	0.0%	0
Internet / delivered	16.3%	130	16.0%	23	23.3%	21	17.1%	15	15.6%	14	13.5%	17	16.1%	24	14.0%	8	14.6%	7
(Don't know / can't remember)	1.9%	16	0.0%	0	7.4%	7	2.0%	2	4.5%	4	0.0%	0	0.0%	0	0.7%	0	5.0%	3
(Don't do this type of shopping)	51.4%	411	62.6%	89	36.2%	33	56.3%	51	35.7%	32	42.5%	54	59.0%	87	64.1%	38	52.7%	27
Weighted base:	800		142		92		90		90		128		148		60		51	
Sample:	800		100		100		100		100		100		100		100		100	

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q29 And the time before that, where did you or your household go to make a purchase of recreational goods such as sports equipment, bicycles, musical instruments or toys?</b>																		
<i>Not 'Don't do' or 'Don't know' at Q28</i>																		
Asda, Colliers Way, Tonypany	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	2	1.9%	0	0.0%	0
Asda, Coychurch Road, Bridgend	0.9%	3	2.6%	1	0.0%	0	0.0%	0	3.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.5%	2
Lidl, Broadview, Tondy, Bridgend	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0
Tesco Extra, Cowbridge Road, Bridgend	2.1%	8	1.8%	1	8.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.6%	2
Tesco Extra, Green Park, Talbot Green, Pontyclun	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	3.3%	1	0.0%	0
Aberkenfig (Valleys Gateway)	0.7%	3	0.0%	0	0.0%	0	0.0%	0	4.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	9.8%	36	7.9%	4	17.2%	9	11.9%	4	23.0%	12	1.2%	1	1.5%	1	0.0%	0	21.7%	5
Cardiff City Centre	7.8%	29	8.7%	5	9.9%	5	8.7%	3	8.4%	5	9.3%	7	4.9%	3	5.2%	1	2.7%	1
Llantrisant	1.5%	6	0.0%	0	0.0%	0	0.0%	0	2.9%	2	1.1%	1	4.2%	3	3.3%	1	0.0%	0
Maesteg	1.6%	6	0.0%	0	0.0%	0	7.7%	3	0.0%	0	0.0%	0	0.0%	0	13.8%	3	0.0%	0
Neath	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	1
Penarth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	1.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	4	0.0%	0	0.0%	0	0.0%	0
Pontypridd	2.7%	10	0.0%	0	0.0%	0	4.8%	2	0.0%	0	0.0%	0	13.1%	8	1.9%	0	0.0%	0
Port Talbot	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	1	0.0%	0
Porthcawl	0.3%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0
Swansea City Centre	3.4%	13	0.0%	0	1.9%	1	17.3%	6	1.7%	1	1.2%	1	3.1%	2	0.0%	0	6.3%	1
Talbot Green Town Centre	5.1%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.6%	17	1.8%	1	1.9%	0	0.0%	0
Tondy	0.2%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tonypany	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	3	1.9%	0	0.0%	0
Treorchy	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	2	3.3%	1	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	2.5%	9	3.5%	2	1.3%	1	1.6%	1	0.0%	0	6.0%	4	1.8%	1	0.0%	0	3.9%	1
Mcarthurglen Designer Outlet, Derwen, Bridgend	9.4%	35	31.2%	17	3.0%	2	10.1%	4	18.3%	10	1.2%	1	0.0%	0	5.5%	1	6.4%	1
Talbot Green Shopping Park	5.9%	22	0.0%	0	0.0%	0	0.0%	0	3.9%	2	17.5%	13	10.4%	6	0.0%	0	4.2%	1
Waterton Retail Park, Waterton Road, Bridgend	0.9%	3	0.0%	0	5.0%	3	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Capital Shopping Park, Leckwith Road, Cardiff, CF11 8EG	2.6%	10	0.0%	0	6.9%	4	0.0%	0	3.5%	2	5.6%	4	0.0%	0	0.0%	0	0.0%	0
Cardiff - out of centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	4.1%	1	0.0%	0
Other, outside area	0.7%	3	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	2	1.9%	0	0.0%	0
Internet / delivered	32.9%	123	41.2%	22	40.6%	21	34.7%	13	22.6%	12	23.9%	18	39.6%	24	33.0%	7	27.6%	6
TV / Interactive shopping	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	1	0.0%	0
(Don't know / can't remember)	3.2%	12	1.5%	1	3.3%	2	1.6%	1	5.3%	3	1.2%	1	5.7%	3	5.2%	1	2.0%	0
Weighted base:		373		53		52		37		54		74		61		21		21
Sample:		324		32		45		34		49		52		40		35		37

# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q30 And where was the last purchase of other non-food items such as books, CDs, jewellery or china and glass items?</b>																		
Asda, Colliers Way, Tonypany	1.2%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	5.4%	8	1.8%	1	0.0%	0
Asda, Coychurch Road, Bridgend	0.9%	7	2.2%	3	0.0%	0	0.6%	1	1.8%	2	0.0%	0	1.1%	2	0.0%	0	0.5%	0
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	3
Marks & Spencer Outlet, McArthurGlen Designer Outlet, Bridgend	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	0.9%	7	0.0%	0	6.7%	6	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Tesco Extra, Green Park, Talbot Green, Pontyclun	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	6	1.1%	2	1.2%	1	0.0%	0
Tesco, Brewery Lane, Bridgend	0.4%	3	1.0%	1	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberkenfig (Valleys Gateway)	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre Cardiff Bay	7.5%	60	14.9%	21	2.1%	2	13.1%	12	13.8%	12	1.8%	2	0.6%	1	0.0%	0	19.5%	10
Cardiff City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.6%	0
Cowbridge	7.2%	57	4.8%	7	7.4%	7	9.4%	8	9.1%	8	14.7%	19	4.3%	6	1.2%	1	2.4%	1
Kenfig Hill	1.2%	9	0.0%	0	0.6%	1	0.0%	0	0.0%	0	6.9%	9	0.0%	0	0.0%	0	0.0%	0
Maesteg	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Merthyr Tydfil	0.9%	7	0.0%	0	0.0%	0	7.0%	6	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.6%	0
Neath	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	3.2%	2	0.0%	0
Pencoed	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Pontyclun	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Pontypridd	0.3%	3	0.0%	0	1.1%	1	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Port Talbot	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	7	0.7%	0	0.0%	0
Porthcawl	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	6.9%	4
Pyle	0.9%	7	0.0%	0	7.4%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea City Centre	0.2%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Talbot Green Town Centre	0.7%	5	1.2%	2	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	2
Tonypany	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3	0.0%	0	0.0%	0	0.0%	0
Treorchy	1.8%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.6%	14	0.0%	0	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	8.0%	5	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.6%	1	0.0%	0	0.0%	0
Talbot Green Shopping Park	1.8%	15	0.0%	0	0.6%	1	2.0%	2	6.9%	6	2.2%	3	1.7%	3	0.0%	0	1.9%	1
Abroad	0.5%	4	0.0%	0	0.6%	1	0.0%	0	0.0%	0	1.7%	2	0.7%	1	0.7%	0	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ikea, Ferry Road, Cardiff, CF11 0XR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Porth	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Treherbert	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Other, zone 1	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Other, zone 7	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Other, outside area	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	2.6%	2	0.0%	0
Internet / delivered	26.9%	216	26.2%	37	43.2%	40	24.8%	22	20.3%	18	28.4%	36	28.0%	41	16.9%	10	19.8%	10
Home catalogue	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
(Don't know / can't remember)	2.2%	18	0.0%	0	0.0%	0	4.4%	4	1.2%	1	0.6%	1	6.1%	9	4.3%	3	1.0%	1
(Don't do this type of shopping)	37.8%	303	47.9%	68	28.7%	26	36.6%	33	43.0%	39	31.5%	40	32.4%	48	52.3%	31	33.8%	17
Weighted base:	800		142		92		90		90		128		148		60		51	
Sample:	800		100		100		100		100		100		100		100		100	

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q31 And the time before that, where did you or your household go to make a purchase of other non-food items such as books, CDs, jewellery or china and glass items?</b>																		
<i>Not 'Don't do' or 'Don't know' at Q30</i>																		
Asda, Colliers Way, Tonypany	1.4%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	6.2%	6	1.5%	0	0.0%	0
Asda, Coychurch Road, Bridgend	1.8%	9	4.2%	3	0.0%	0	1.0%	1	5.3%	3	0.0%	0	0.0%	0	0.0%	0	6.9%	2
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Lidl, High Street, Treorchy	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0
Sainsbury's, The Derwen, Bridgend	0.6%	3	2.4%	2	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Cowbridge Road, Bridgend	1.9%	9	3.9%	3	7.0%	5	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Green Park, Talbot Green, Pontyclun	2.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	6	3.5%	3	2.7%	1	0.0%	0
Tesco, Castle Street, Maesteg	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0
Aberkenfig (Valleys Gateway)	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	13.1%	63	39.3%	29	2.9%	2	19.4%	10	23.4%	12	0.9%	1	1.0%	1	0.0%	0	23.9%	8
Cardiff City Centre	12.4%	59	11.1%	8	18.4%	12	14.4%	8	5.0%	3	23.3%	20	7.0%	6	8.0%	2	0.8%	0
Cowbridge	0.8%	4	1.1%	1	0.0%	0	0.0%	0	0.0%	0	3.5%	3	0.0%	0	0.0%	0	0.0%	0
Kenfig Hill	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Llantrisant	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0
Maesteg	1.2%	6	0.0%	0	0.0%	0	10.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Merthyr Tydfil	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	0	0.0%	0
Neath	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	1	1.7%	1
Pencoed	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Pontyclun	0.5%	3	0.0%	0	1.5%	1	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0
Pontypridd	1.6%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.2%	7	1.5%	0	0.0%	0
Port Talbot	1.4%	7	0.0%	0	0.0%	0	4.4%	2	0.0%	0	0.0%	0	0.0%	0	4.2%	1	9.9%	3
Porthcawl	1.2%	6	0.0%	0	8.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pyle	0.3%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Swansea City Centre	1.1%	5	1.1%	1	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	0	7.7%	3
Talbot Green Town Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.8%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Tonypany	3.3%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.6%	16	0.0%	0	0.0%	0
Treorchy	1.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	15.4%	4	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	2.1%	1
Mcarthurglen Designer Outlet, Derwen, Bridgend	3.2%	15	1.9%	1	4.1%	3	3.4%	2	9.2%	5	3.2%	3	1.0%	1	0.0%	0	3.0%	1
Talbot Green Shopping Park	1.3%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	6	0.0%	0	1.5%	0	0.0%	0
Abroad	0.1%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Capital Shopping Park, Leckwith Road, Cardiff, CF11 8EG	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil, CF48 1HY	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Ikea, Ferry Road, Cardiff, CF11 0XR	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Treherbert	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0
Other, zone 1	0.4%	2	0.0%	0	3.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Other, zone 7	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0
Other, outside area	0.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	2	0.0%	0	6.0%	2	0.8%	0
Internet / delivered	42.5%	204	35.1%	26	48.7%	32	43.1%	23	46.6%	23	43.5%	38	42.7%	39	39.4%	10	38.7%	13
Home catalogue	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	1.5%	0	0.0%	0
TV / Interactive shopping	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0
(Don't know / can't remember)	2.0%	10	0.0%	0	1.9%	1	0.0%	0	4.2%	2	2.6%	2	1.8%	2	7.0%	2	1.7%	1
Weighted base:	479		74		66		53		50		87		91		26			33
Sample:	461		56		67		50		53		66		64		45			60



Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q32A When undertaking shopping via the internet, how do you NORMALLY receive the items you have purchased?</b>																		
Delivery to home	69.9%	559	69.0%	98	78.0%	72	78.4%	70	77.2%	69	78.8%	101	56.2%	83	59.2%	36	59.0%	30
Delivery to another address e.g neighbour / work (but not a store or collection point)	1.0%	8	2.0%	3	2.2%	2	0.7%	1	0.0%	0	2.2%	3	0.0%	0	0.0%	0	0.0%	0
Delivered to store (Click & collect)	4.1%	33	7.7%	11	2.6%	2	0.0%	0	4.2%	4	3.2%	4	5.0%	7	6.6%	4	0.5%	0
Delivered to a collection point (e.g third party newsagent or convenience store etc.)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0
Other (Don't know / can't remember / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't shop online)	0.5%	4	0.6%	1	0.0%	0	0.6%	1	0.7%	1	1.1%	1	0.0%	0	1.3%	1	0.0%	0
Weighted base:	24.5%	196	20.7%	29	17.2%	16	20.3%	18	17.9%	16	14.8%	19	38.8%	57	32.9%	20	40.0%	20
Sample:	800	800	142	100	92	100	100	90	100	90	100	128	100	148	100	60	100	51

**Q32B What is your nearest town centre?**

Aberkenfig (Valleys Gateway)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	40.3%	322	100.0%	142	24.6%	23	15.0%	13	95.1%	85	21.0%	27	4.0%	6	0.0%	0	51.2%	26
Cardiff City Centre	3.5%	28	0.0%	0	0.7%	1	0.0%	0	0.0%	0	19.0%	24	1.5%	2	0.7%	0	0.5%	0
Cowbridge	2.9%	23	0.0%	0	0.6%	1	0.0%	0	0.0%	0	17.6%	23	0.0%	0	0.0%	0	0.0%	0
Llantrisant	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4	0.0%	0	0.0%	0
Maesteg	10.4%	84	0.0%	0	0.0%	0	85.0%	76	0.0%	0	0.0%	0	0.0%	0	10.8%	7	1.5%	1
Merthyr Tydfil	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Neath	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Pencoed	0.6%	5	0.0%	0	0.0%	0	0.0%	0	3.0%	3	1.7%	2	0.0%	0	0.0%	0	0.0%	0
Pontyclun	1.6%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.9%	13	0.0%	0	0.0%	0	0.0%	0
Pontypridd	3.3%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	8	8.6%	13	9.1%	5	0.0%	0
Port Talbot	3.6%	28	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.3%	11	33.3%	17
Porthcawl	9.0%	72	0.0%	0	72.7%	67	0.0%	0	0.6%	1	0.0%	0	0.7%	1	0.0%	0	7.1%	4
Pyle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Swansea City Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Talbot Green Town Centre	6.2%	50	0.0%	0	0.0%	0	0.0%	0	0.6%	1	24.6%	32	11.6%	17	1.2%	1	0.0%	0
Tonypanydy	7.9%	63	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	42.9%	63	0.0%	0	0.0%	0
Tonyrefail	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	6	0.0%	0	0.0%	0
Treorchy	7.8%	63	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.9%	31	53.3%	32	0.0%	0
Aberdare Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Bargoed Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0
Gelli Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Pentre Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Treherbert Village Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	3	0.0%	0
(Don't know / uncertain)	0.4%	3	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	4.0%	2
Weighted base:	800	800	142	100	92	100	100	90	100	90	100	128	100	148	100	60	100	51
Sample:	800	800	142	100	92	100	100	90	100	90	100	128	100	148	100	60	100	51

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q32C What things do you think could be improved about that town centre? [MR]</b>																		
<i>Not 'Don't know / uncertain' at Q32B</i>																		
Better signposting within the centre	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheaper parking	8.1%	64	11.7%	17	14.1%	13	4.3%	4	10.1%	9	11.2%	14	4.6%	7	0.0%	0	1.7%	1
Improved access for wheelchair and pushchair users	0.9%	7	0.7%	1	3.5%	3	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	4.7%	2
More accessible car parking	2.4%	19	2.6%	4	2.8%	3	0.6%	1	2.7%	2	1.3%	2	4.7%	7	1.2%	1	1.1%	1
More frequent bus services to the centre	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	4	1.1%	2	0.0%	0	0.5%	0
More frequent train services	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.2%	2	0.0%	0	0.0%	0	0.5%	0
More parking	15.3%	122	13.4%	19	13.9%	13	3.9%	3	14.1%	13	28.6%	37	19.2%	28	13.0%	8	3.3%	2
More priority for pedestrians	2.3%	18	10.3%	15	2.2%	2	0.7%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
More reliable / comfortable bus services	0.7%	6	1.5%	2	0.6%	1	0.0%	0	1.3%	1	0.6%	1	0.0%	0	0.7%	0	1.0%	1
More reliable train services	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More secure parking	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.6%	1	0.0%	0	0.0%	0
New / relocated bus stops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better street furniture / floral displays	1.9%	16	2.0%	3	0.0%	0	1.5%	1	5.5%	5	0.7%	1	0.0%	0	2.4%	1	8.3%	4
Cleaner streets / removal of litter	3.9%	31	9.3%	13	0.7%	1	0.7%	1	6.1%	6	6.2%	8	0.7%	1	0.0%	0	5.2%	3
Improve appearance / environment of centre	4.2%	33	4.5%	6	4.3%	4	4.8%	4	4.3%	4	1.1%	1	2.5%	4	1.8%	1	17.9%	9
Improved security measures / more CCTV / more police	0.9%	7	0.0%	0	0.0%	0	1.0%	1	3.2%	3	0.0%	0	0.7%	1	0.0%	0	4.7%	2
More control on alcohol / drinkers / drug users	1.7%	13	8.9%	13	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More control on other anti-social behaviour	2.2%	17	7.6%	11	0.7%	1	0.0%	0	4.2%	4	0.0%	0	0.0%	0	0.0%	0	4.7%	2
More green spaces / areas	0.9%	7	0.0%	0	0.0%	0	1.1%	1	6.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More shelter from wind / rain	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better choice of shops in general	36.2%	289	46.4%	66	25.3%	23	44.3%	40	49.2%	44	16.5%	21	35.3%	52	28.3%	17	52.8%	26
Better crèche facilities	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better quality of shops	12.3%	98	10.5%	15	9.8%	9	20.4%	18	12.6%	11	6.6%	8	9.8%	15	7.3%	4	36.2%	18
Bigger / better supermarket	3.4%	27	1.9%	3	5.5%	5	4.1%	4	2.1%	2	2.2%	3	6.1%	9	2.0%	1	2.2%	1
Expand the town centre's colleges / expand university	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fewer bars / nightclubs	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improvement to the market	3.3%	27	6.4%	9	0.6%	1	9.8%	9	2.9%	3	2.0%	3	0.0%	0	3.9%	2	1.1%	1
More / better eating places	1.6%	12	1.3%	2	5.0%	5	0.0%	0	0.7%	1	0.0%	0	1.7%	3	0.7%	0	4.8%	2
More / better leisure facilities	4.2%	34	1.2%	2	11.0%	10	1.9%	2	0.0%	0	3.8%	5	6.3%	9	6.8%	4	4.2%	2
More / better pubs / night-life	1.5%	12	4.6%	7	2.2%	2	0.0%	0	0.7%	1	0.0%	0	0.0%	0	1.2%	1	4.8%	2
More family oriented facilities	0.8%	6	3.0%	4	0.6%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	1.4%	1	0.5%	0
More independent shops	12.9%	103	10.5%	15	10.7%	10	21.4%	19	14.2%	13	2.3%	3	17.6%	26	4.8%	3	30.1%	15
More national multiple (high street chain) retailers	15.6%	124	18.0%	26	4.6%	4	26.2%	24	31.7%	28	5.1%	7	14.1%	21	10.0%	6	18.7%	9
More secure children's play areas	0.6%	5	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	1.4%	1	4.7%	2
Provision of more residential accommodation	0.3%	2	0.0%	0	0.6%	1	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fewer charity shops	3.1%	25	3.6%	5	6.8%	6	2.6%	2	5.5%	5	1.7%	2	0.7%	1	0.0%	0	6.0%	3
More / better public toilets	5.4%	43	2.5%	4	24.9%	23	7.2%	7	5.5%	5	1.2%	2	0.0%	0	1.5%	1	5.2%	3
More clothes shops	2.2%	18	2.2%	3	1.2%	1	3.3%	3	1.0%	1	1.1%	1	3.1%	5	5.3%	3	1.1%	1
More service outlets (banks etc)	2.7%	21	0.0%	0	0.0%	0	1.5%	1	1.0%	1	0.7%	1	9.0%	13	7.5%	4	0.5%	0
Fewer empty shops	0.6%	5	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	1.0%	1
Less traffic congestion	2.3%	18	0.0%	0	2.2%	2	0.0%	0	0.6%	1	4.5%	6	2.7%	4	8.8%	5	1.6%	1
(Don't know)	4.2%	33	4.0%	6	3.2%	3	0.6%	1	0.6%	1	6.3%	8	8.7%	13	3.5%	2	1.0%	1
(None mentioned)	16.6%	132	7.9%	11	12.1%	11	15.8%	14	13.5%	12	24.4%	31	17.6%	26	27.8%	17	20.2%	10
Weighted base:		797		142		91		90		90		128		148		60		49
Sample:		797		100		99		100		100		100		100		99		99

# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q33 In which city, town or out-of-town location does your household spend most money on restaurants &amp; cafes?</b>																		
Aberkenfig (Valleys Gateway)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0								
Barry	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.5%	0								
Bridgend Town Centre	16.1%	129	44.0%	62	9.1%	8	21.8%	20	23.7%	21	6.1%	8	3.9%	6	1.8%	1	5.2%	3
Caerphilly	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Cardiff Bay	1.1%	9	1.3%	2	0.6%	1	2.7%	2	1.4%	1	2.2%	3	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	12.4%	99	8.2%	12	10.0%	9	19.9%	18	17.1%	15	20.2%	26	5.4%	8	8.9%	5	10.9%	6
Cowbridge	4.1%	32	8.8%	13	4.7%	4	0.0%	0	2.3%	2	9.3%	12	1.1%	2	0.0%	0	0.0%	0
Cwmbran	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kenfig Hill	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.4%	3
Lalestan/St Brides	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Llantrisant	1.4%	12	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.1%	1	5.2%	8	3.2%	2	0.0%	0
Maesteg	2.7%	22	0.0%	0	0.0%	0	21.5%	19	0.6%	1	0.0%	0	0.0%	0	3.0%	2	0.0%	0
Margam	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.4%	1
Merthyr Tydfil	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.2%	1	0.0%	0
Neath	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.1%	1
Ogmore Vale	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Penarth	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0
Pencoed	1.0%	8	0.0%	0	0.0%	0	0.0%	0	7.1%	6	1.1%	1	0.0%	0	0.7%	0	0.0%	0
Pontyclun	1.3%	11	0.6%	1	0.0%	0	0.0%	0	0.0%	0	7.7%	10	0.0%	0	0.0%	0	0.0%	0
Pontypridd	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	3	1.2%	1	0.0%	0
Port Talbot	1.5%	12	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	8.4%	5	10.8%	5
Porthcawl	7.7%	62	2.1%	3	48.9%	45	0.0%	0	3.7%	3	0.7%	1	0.7%	1	0.0%	0	16.5%	8
Swansea City Centre	0.6%	5	0.0%	0	0.6%	1	1.3%	1	0.0%	0	0.0%	0	0.6%	1	2.3%	1	1.0%	1
Talbot Green Town Centre	4.8%	39	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.5%	28	7.2%	11	0.7%	0	0.0%	0
Tonypanyd	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	6	0.0%	0	0.0%	0
Tonyrefail	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Treorchy	2.4%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	7	19.7%	12	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	1.7%	14	0.6%	1	2.0%	2	3.3%	3	5.4%	5	0.0%	0	1.1%	2	1.2%	1	1.4%	1
Talbot Green Shopping Park	1.4%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	6.1%	9	0.0%	0	0.0%	0
Treherbert	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	2	0.0%	0
Other	3.6%	29	1.2%	2	1.9%	2	0.0%	0	0.0%	0	3.1%	4	11.0%	16	4.5%	3	4.5%	2
(Don't know / varies)	5.0%	40	2.9%	4	2.6%	2	5.2%	5	4.7%	4	5.1%	6	7.0%	10	11.3%	7	1.9%	1
(Don't do this activity)	27.7%	222	30.3%	43	19.6%	18	21.1%	19	32.5%	29	18.2%	23	37.1%	55	25.9%	16	37.3%	19
Weighted base:	800	142		92		90		90		128		148		60		51		
Sample:	800	100		100		100		100		100		100		100		100		

# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q34 In which city, town or out-of-town location does your household spend most money on pubs / bars / nightclubs / music venues?</b>																		
Aberkenfig (Valleys Gateway)	0.5%	4	0.6%	1	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.6%	1	0.0%	0	0.5%	0
Barry	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0
Bridgend Town Centre	8.1%	65	26.5%	38	0.7%	1	7.9%	7	14.5%	13	2.0%	3	0.0%	0	1.2%	1	5.5%	3
Caerphilly	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0
Cardiff Bay	0.7%	6	0.0%	0	0.0%	0	4.6%	4	0.7%	1	0.7%	1	0.0%	0	0.0%	0	0.5%	0
Cardiff City Centre	10.1%	81	3.5%	5	8.4%	8	23.0%	21	10.8%	10	17.5%	22	7.5%	11	5.5%	3	2.3%	1
Cowbridge	2.1%	16	4.6%	7	0.0%	0	0.0%	0	2.1%	2	6.3%	8	0.0%	0	0.0%	0	0.0%	0
Cwmbran	0.3%	2	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Kenfig Hill	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	10.5%	5
Llantrisant	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	3	0.7%	1	0.0%	0	0.0%	0
Maesteg	2.6%	21	0.0%	0	0.0%	0	20.2%	18	0.0%	0	0.0%	0	0.0%	0	4.3%	3	0.0%	0
Margam	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Merthyr Tydfil	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0
Neath	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Ogmore Vale	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pencoed	1.1%	9	0.0%	0	0.0%	0	0.7%	1	8.0%	7	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Pontyclun	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4	0.0%	0	0.0%	0	0.0%	0
Pontypridd	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3	0.0%	0	0.7%	0	0.0%	0
Port Talbot	0.5%	4	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	4.7%	2
Porthcawl	6.2%	49	0.0%	0	44.2%	41	0.0%	0	2.0%	2	0.7%	1	0.0%	0	0.0%	0	11.8%	6
Pyle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Swansea City Centre	0.5%	4	1.0%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.6%	1	1.2%	1	0.5%	0
Talbot Green Town Centre	1.2%	10	0.0%	0	0.0%	0	0.0%	0	0.6%	1	4.7%	6	2.2%	3	0.0%	0	0.0%	0
Tondu	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Tonypany	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	5	0.7%	0	0.0%	0
Treorchy	1.4%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	4	11.9%	7	0.0%	0
Mcarthurglen Designer Outlet, Derwen, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Treherbert	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	4.3%	3	0.0%	0
Other	5.2%	41	2.5%	4	4.8%	4	0.7%	1	0.6%	1	12.6%	16	7.3%	11	5.4%	3	4.5%	2
(Don't know / varies)	3.2%	26	3.3%	5	3.4%	3	3.7%	3	1.4%	1	2.4%	3	5.5%	8	2.5%	1	0.9%	0
(Don't do this activity)	52.3%	418	58.0%	82	38.5%	35	37.3%	33	54.6%	49	45.1%	58	65.2%	96	59.2%	36	56.3%	29
Weighted base:	800	142		92		90		90		128		148		60		51		
Sample:	800	100		100		100		100		100		100		100		100		

# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q35 Where does your household spend most money on the cinema / theatre?</b>																		
Cineworld, Cardiff	2.8%	23	2.6%	4	2.2%	2	4.0%	4	2.1%	2	6.7%	9	1.4%	2	0.0%	0	1.8%	1
Coliseum Theatre, Aberdare	0.2%	1	0.0%	0	0.6%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Grand Pavilion, Porthcawl	0.3%	2	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gwyn Hall, Neath	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
New Theatre, Cardiff	1.7%	13	2.0%	3	1.7%	2	2.0%	2	0.6%	1	2.3%	3	2.3%	3	0.0%	0	0.5%	0
ODEON, Cardiff Bay	0.8%	7	0.0%	0	0.0%	0	0.0%	0	1.0%	1	4.4%	6	0.0%	0	0.0%	0	0.0%	0
ODEON, Designer Outlet Village, Bridgend	33.1%	265	57.5%	82	53.2%	49	36.1%	32	47.3%	42	20.0%	26	12.7%	19	6.4%	4	22.4%	11
Park & Dare Theatre, Treorchy	2.2%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	6	18.3%	11	0.0%	0
Premiere Cinema, Cardiff	0.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Reel Cinema, Port Talbot	2.0%	16	0.0%	0	4.7%	4	5.3%	5	0.0%	0	0.0%	0	0.0%	0	6.1%	4	6.7%	3
Sherman Theatre, Cardiff	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Showcase Cinema, Nantgarw	6.1%	49	0.0%	0	0.0%	0	0.0%	0	0.6%	1	10.6%	14	21.1%	31	6.1%	4	0.0%	0
Swansea Grand Theatre	0.2%	2	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.5%	0
The Phoenix, Ton Pentre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0
The Princess Royal Theatre, Port Talbot	0.8%	6	0.0%	0	0.0%	0	5.5%	5	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.6%	0
Vue Cinema, Cardiff	3.3%	27	0.7%	1	0.7%	1	0.0%	0	3.8%	3	15.3%	20	1.4%	2	0.0%	0	0.0%	0
Vue Cinema, Merthyr	1.8%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	6	0.7%	1	11.1%	7	0.6%	0
Vue Cinema, Swansea	1.0%	8	1.0%	1	0.0%	0	2.0%	2	3.2%	3	0.7%	1	0.0%	0	1.2%	1	1.4%	1
Wales Millennium Centre, Cardiff	3.1%	25	2.6%	4	1.7%	2	3.0%	3	1.0%	1	9.6%	12	1.3%	2	1.2%	1	2.2%	1
Cardiff City Centre	0.2%	1	0.7%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maesteg Town Hall, Talbot Street, Maesteg	0.4%	3	0.0%	0	0.0%	0	3.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Reel Cinema, Hollywood Park, The Princess Margaret Way, Port Talbot	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
St David's Hall, The Hayes, Cardiff	0.8%	6	0.0%	0	0.0%	0	0.0%	0	4.8%	4	1.2%	2	0.0%	0	0.0%	0	0.9%	0
Taliesin Arts Centre, Sketty, Swansea	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Red Dragon Centre, Hemingway Road, Cardiff	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
(Don't know / varies)	0.9%	7	0.0%	0	0.0%	0	3.9%	4	1.3%	1	0.6%	1	0.6%	1	0.7%	0	0.9%	0
(Don't do this activity)	37.5%	300	32.5%	46	32.4%	30	33.9%	30	33.0%	30	22.9%	29	51.5%	76	46.5%	28	60.8%	31
Weighted base:		800		142		92		90		90		128		148		60		51
Sample:		800		100		100		100		100		100		100		100		100

# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q36 In which city, town or out-of-town location does your household spend most money on health &amp; fitness?</b>																		
Energie Fitness, Brackla Shopping Centre, Bridgend	1.6%	12	4.6%	7	0.0%	0	0.0%	0	6.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
First Class, Kestrel Close, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GYM4LESS, Litchard Industrial Estate, Bridgend	1.0%	8	4.6%	7	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Halo Bridgend Life Centre, Bridgend	2.9%	23	10.1%	14	1.8%	2	0.7%	1	5.9%	5	0.0%	0	0.0%	0	0.0%	0	2.3%	1
Halo Garw Valley Life Centre, Pontycymmer	0.6%	5	0.0%	0	0.0%	0	4.6%	4	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halo Ogmores Valley Life Centre, Ogmores Vale	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	3	0.0%	0	0.0%	0	0.0%	0
Halo Pencoed Swimming Pool, Pencoed	0.8%	7	0.0%	0	0.0%	0	0.7%	1	6.0%	5	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Halo Pyle Swimming Pool, Pyle, Kenfig Hill	1.0%	8	0.0%	0	4.4%	4	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	3.5%	2
K 2 Gym, Main Ave, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nuffield Health Fitness & Wellbeing Gym, Waterton Rd, Bridgend	2.3%	18	5.2%	7	7.5%	7	0.0%	0	2.8%	3	0.7%	1	0.0%	0	0.0%	0	0.9%	0
Physique Health & Leisure, Brackla, Bridgend	0.8%	7	3.3%	5	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Porthcawl Health & Fitness, Porthcawl	0.8%	7	0.7%	1	5.0%	5	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Snap Fitness, Bridgend	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Xtreme Physique, Pyle, Bridgend	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Halo, Old Forge Site, Nant-y-Crynwylld, Maesteg	2.3%	19	0.0%	0	0.0%	0	19.4%	17	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Port Talbot	1.1%	9	0.0%	0	2.8%	3	4.6%	4	0.0%	0	0.0%	0	0.0%	0	1.8%	1	1.7%	1
Rhondda Sports Centre, Tyntla Road, Geligaled Park, Pentre	3.1%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.6%	20	8.0%	5	0.0%	0
Other	5.2%	41	0.7%	1	5.7%	5	1.3%	1	5.7%	5	18.5%	24	2.9%	4	1.2%	1	0.0%	0
(Don't know / varies)	2.9%	23	4.1%	6	3.6%	3	0.7%	1	2.4%	2	2.1%	3	4.7%	7	1.9%	1	0.5%	0
(Don't do this activity)	72.9%	584	66.1%	94	69.2%	64	64.9%	58	66.8%	60	74.6%	96	78.8%	116	85.2%	51	88.4%	45
Weighted base:	800		142		92		90		90		128		148		60		51	
Sample:	800		100		100		100		100		100		100		100		100	

Weighted:

February 2019

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8									
<b>Q37 In which city, town, or out-of-town location does your household spend most money on bingo / casinos?</b>																		
Castle Bingo, Bridgend	4.8%	38	12.1%	17	3.9%	4	3.9%	4	7.5%	7	1.8%	2	1.7%	3	0.0%	0	4.3%	2
Castle Bingo, Canton, Cardiff	0.6%	5	0.0%	0	0.0%	0	4.6%	4	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Castle Bingo, Morriston, Swansea	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Castle Bingo, Nantgarw	2.9%	23	0.0%	0	0.0%	0	0.6%	1	0.0%	0	2.5%	3	10.3%	15	6.6%	4	0.0%	0
Castle Bingo, Neath	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.5%	0
Grosvenor Casino, Cardiff	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3	0.0%	0	0.0%	0
Judges Bingo, Tonypany	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.8%	0	0.0%	0
Les Croupiers Casino, Cardiff	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mecca Bingo, Camarthen Road, Swansea	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0
Blaengwynfi Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Cardiff City Centre	0.7%	6	0.7%	1	5.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Croeserw Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Ogmore Vale Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pencoed Social Club, Hendre Road, Pencoed, Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
The Royal British Legion, Pyle Road, Pyle, Bridgend	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
United Services Club, New Road, Porthcawl	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.3%	2	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
(Don't do this activity)	89.2%	714	87.2%	124	90.5%	83	88.2%	79	89.7%	81	94.4%	121	84.7%	125	88.8%	53	93.6%	47
Weighted base:		800		142		92		90		90		128		148		60		51
Sample:		800		100		100		100		100		100		100		100		100

**Q38 In which city, town, or out-of-town location does your household spend most money on family entertainment or recreation? (i.e. ten pin bowling, ice skating, children's play centres, museums, visitor attractions etc.)**

Bridgend Town Centre	3.6%	29	12.6%	18	1.3%	1	1.3%	1	6.8%	6	0.7%	1	0.6%	1	0.0%	0	0.6%	0
Cardiff Bay	1.8%	14	1.3%	2	1.9%	2	0.0%	0	0.7%	1	6.4%	8	0.6%	1	0.0%	0	1.8%	1
Cardiff City Centre	12.7%	102	8.5%	12	22.3%	21	29.3%	26	13.4%	12	14.4%	18	4.4%	6	5.7%	3	5.6%	3
Cowbridge	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Llantrisant	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Maesteg	0.3%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0
Pontyclun	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.7%	1	0.0%	0	0.0%	0
Port Talbot	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.1%	1
Porthcawl	0.5%	4	0.0%	0	2.1%	2	0.6%	1	1.6%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Swansea City Centre	1.5%	12	0.0%	0	4.3%	4	7.3%	7	0.0%	0	0.0%	0	0.0%	0	1.8%	1	1.2%	1
Talbot Green Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tonypany	2.0%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.7%	16	0.0%	0	0.0%	0
Tonyrefail	0.8%	6	1.0%	1	0.6%	1	0.0%	0	2.1%	2	0.0%	0	1.1%	2	1.2%	1	0.0%	0
Treorchy	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	5	0.0%	0	0.0%	0
Bridgend Retail Park, Cowbridge Road, Bridgend	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Treherbert	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Other	2.1%	17	0.0%	0	0.6%	1	0.0%	0	0.7%	1	1.8%	2	9.0%	13	0.0%	0	0.0%	0
(Don't know / varies)	2.1%	17	0.0%	0	0.7%	1	2.0%	2	0.0%	0	4.3%	6	3.6%	5	4.7%	3	1.4%	1
(Don't do this activity)	70.9%	568	76.6%	109	65.5%	60	58.5%	53	73.9%	66	69.2%	89	66.0%	97	81.2%	49	88.5%	45
Weighted base:		800		142		92		90		90		128		148		60		51
Sample:		800		100		100		100		100		100		100		100		100

**GEN Gender of respondent:**

Male	32.6%	261	36.3%	52	38.3%	35	41.6%	37	27.6%	25	29.0%	37	30.5%	45	23.5%	14	30.1%	15
Female	67.4%	539	63.7%	90	61.7%	57	58.4%	52	72.4%	65	71.0%	91	69.5%	103	76.5%	46	69.9%	35
Weighted base:		800		142		92		90		90		128		148		60		51
Sample:		800		100		100		100		100		100		100		100		100

# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
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**AGE Could I ask how old you are please?**

18 to 24	6.2%	49	4.6%	7	0.0%	0	4.6%	4	0.0%	0	4.9%	6	10.1%	15	5.4%	3	28.0%	14
25 to 34	12.2%	98	13.7%	20	15.0%	14	13.7%	12	14.5%	13	9.9%	13	10.1%	15	5.4%	3	16.0%	8
35 to 44	18.3%	146	22.1%	31	21.9%	20	26.0%	23	23.4%	21	19.5%	25	8.9%	13	14.2%	9	7.0%	4
45 to 54	19.7%	157	23.9%	34	18.1%	17	23.8%	21	21.7%	20	21.4%	27	19.1%	28	7.8%	5	11.0%	6
55 to 64	19.4%	155	18.6%	26	15.9%	15	12.6%	11	17.5%	16	21.0%	27	24.8%	37	28.8%	17	12.0%	6
65 +	24.4%	195	17.1%	24	29.1%	27	19.3%	17	22.9%	21	23.3%	30	27.0%	40	38.3%	23	25.9%	13
(Refused)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		800		142		92		90		90		128		148		60		51
Sample:		800		100		100		100		100		100		100		100		100

**QUOTA Zone:**

Zone 1	17.8%	142	100.0%	142	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2	11.5%	92	0.0%	0	100.0%	92	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3	11.2%	90	0.0%	0	0.0%	0	100.0%	90	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 4	11.2%	90	0.0%	0	0.0%	0	0.0%	0	100.0%	90	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 5	16.0%	128	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	128	0.0%	0	0.0%	0	0.0%	0
Zone 6	18.5%	148	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	148	0.0%	0	0.0%	0
Zone 7	7.5%	60	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	60	0.0%	0
Zone 8	6.3%	51	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	51
Weighted base:		800		142		92		90		90		128		148		60		51
Sample:		800		100		100		100		100		100		100		100		100

**PC Postcode sector:**

CF31 1	3.5%	28	19.9%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CF31 2	4.1%	32	22.9%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CF31 3	1.7%	13	9.5%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CF31 4	5.0%	40	28.3%	40	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CF31 5	3.4%	28	19.4%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CF32 0	2.0%	16	0.0%	0	17.5%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CF32 7	0.8%	6	0.0%	0	0.0%	0	0.0%	0	6.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CF32 8	1.5%	12	0.0%	0	0.0%	0	13.8%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CF32 9	3.6%	29	0.0%	0	0.0%	0	0.0%	0	32.2%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CF33 4	1.2%	9	0.0%	0	10.3%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CF33 6	4.1%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	64.6%	33
CF34 0	2.8%	23	0.0%	0	0.0%	0	25.3%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CF34 9	6.8%	55	0.0%	0	0.0%	0	60.9%	55	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CF35 5	1.5%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.2%	12	0.0%	0	0.0%	0	0.0%	0
CF35 6	6.8%	55	0.0%	0	0.0%	0	0.0%	0	61.0%	55	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CF36 3	4.8%	38	0.0%	0	41.5%	38	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CF36 5	3.5%	28	0.0%	0	30.8%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CF39 8	4.6%	37	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.9%	37	0.0%	0	0.0%	0
CF40 1	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	7	0.0%	0	0.0%	0
CF40 2	3.5%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.0%	28	0.0%	0	0.0%	0
CF41 7	9.5%	76	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	51.4%	76	0.0%	0	0.0%	0
CF42 5	3.1%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	40.7%	24	0.0%	0
CF42 6	2.2%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	29.5%	18	0.0%	0
CF71 7	3.4%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.4%	27	0.0%	0	0.0%	0	0.0%	0
CF72 8	7.4%	59	0.0%	0	0.0%	0	0.0%	0	0.0%	0	46.0%	59	0.0%	0	0.0%	0	0.0%	0
CF72 9	3.7%	30	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.4%	30	0.0%	0	0.0%	0	0.0%	0
SA13 2	2.2%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	35.4%	18
SA13 3	2.2%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	29.8%	18	0.0%	0
Weighted base:		800		142		92		90		90		128		148		60		51
Sample:		800		100		100		100		100		100		100		100		100



### **Appendix 3:**

Data Tabulations

By Q32B – Part One

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Q32B Aberkenfig	Q32B Bridgend	Q32B Cardiff	Q32B Cowbridge	Q32B Llantrisant	Q32B Maesteg	Q32B Merthyr Tydfil	Q32B Neath	Q32B Pencoed	Q32B Pontyclun	Q32B Pontypridd	Q32B Port Talbot	Q32B Porthcawl														
<b>Q32B What is your nearest town centre?</b>																												
Aberkenfig (Valleys Gateway)	0.1%	1	100.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0														
Bridgend Town Centre	38.5%	308	0.0%	0	100.0%	308	0.0%	0	0.0%	0	0.0%	0	0.0%	0														
Cardiff City Centre	2.5%	20	0.0%	0	0.0%	0	100.0%	20	0.0%	0	0.0%	0	0.0%	0														
Cowbridge	2.1%	17	0.0%	0	0.0%	0	0.0%	0	100.0%	17	0.0%	0	0.0%	0														
Llantrisant	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	2	0.0%	0														
Maesteg	12.0%	96	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	96	0.0%	0														
Merthyr Tydfil	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	1														
Neath	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	100.0%														
Pencoed	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	100.0%														
Pontyclun	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	100.0%														
Pontypridd	3.1%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	100.0%														
Port Talbot	6.5%	52	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	100.0%														
Porthcawl	10.8%	86	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	100.0%														
Pyle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%														
Swansea City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%														
Talbot Green Town Centre	4.6%	37	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%														
Tonypanyd	5.0%	40	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%														
Tonyrefail	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%														
Treorchy	9.6%	77	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%														
Aberdare Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%														
Bargoed Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%														
Gelli Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%														
Pentre Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%														
Treherbert Village Centre	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%														
(Don't know / uncertain)	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%														
Base:		800		1		308		20		17		2		96		1		2		7		8		25		52		86

# Bridgend Borough Retail Study for Peter Brett Associates

	Total	Q32B Aberkenfig	Q32B Bridgend	Q32B Cardiff	Q32B Cowbridge	Q32B Llantrisant	Q32B Maesteg	Q32B Merthyr Tydfil	Q32B Neath	Q32B Pencoed	Q32B Pontyclun	Q32B Pontypridd	Q32B Port Talbot	Q32B Porthcawl
<b>Q32C</b> What things do you think could be improved about that town centre? [MR]														
<i>Not 'Don't know / uncertain' at Q32B</i>														
Better signposting within the centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheaper parking	7.5%	60	0.0%	0	12.3%	38	15.0%	3	11.8%	2	0.0%	0	1.0%	1
Improved access for wheelchair and pushchair users	1.0%	8	0.0%	0	1.3%	4	0.0%	0	0.0%	0	0.0%	0	14.3%	1
More accessible car parking	2.9%	23	0.0%	0	4.9%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More frequent bus services to the centre	0.8%	6	0.0%	0	1.0%	3	5.0%	1	5.9%	1	0.0%	0	0.0%	0
More frequent train services	0.5%	4	0.0%	0	0.3%	1	0.0%	0	5.9%	1	0.0%	0	0.0%	0
More parking	12.0%	96	0.0%	0	11.7%	36	15.0%	3	29.4%	5	100.0%	2	6.3%	6
More priority for pedestrians	1.3%	10	0.0%	0	3.2%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More reliable / comfortable bus services	1.1%	9	0.0%	0	1.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More reliable train services	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More secure parking	0.3%	2	0.0%	0	0.0%	0	0.0%	0	5.9%	1	0.0%	0	0.0%	0
New / relocated bus stops	0.1%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better street furniture / floral displays	1.3%	10	0.0%	0	2.3%	7	0.0%	0	0.0%	0	2.1%	2	0.0%	0
Cleaner streets / removal of litter	2.3%	18	0.0%	0	3.6%	11	10.0%	2	0.0%	0	0.0%	0	1.0%	1
Improve appearance / environment of centre	5.0%	40	0.0%	0	6.5%	20	0.0%	0	0.0%	0	6.3%	6	0.0%	0
Improved security measures / more CCTV / more police	0.8%	6	0.0%	0	1.3%	4	0.0%	0	0.0%	0	1.0%	1	0.0%	0
More control on alcohol / drinkers / drug users	0.8%	6	0.0%	0	1.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More control on other anti-social behaviour	1.1%	9	0.0%	0	2.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More green spaces / areas	0.6%	5	0.0%	0	1.0%	3	0.0%	0	0.0%	0	2.1%	2	0.0%	0
More shelter from wind / rain	0.1%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better choice of shops in general	39.6%	316	0.0%	0	50.0%	154	5.0%	1	11.8%	2	0.0%	0	45.8%	44
Better crèche facilities	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better quality of shops	13.7%	109	0.0%	0	16.9%	52	0.0%	0	11.8%	2	0.0%	0	20.8%	20
Bigger / better supermarket	3.3%	26	0.0%	0	1.9%	6	0.0%	0	0.0%	1	4.2%	4	100.0%	1
Expand the town centre's colleges / expand university	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fewer bars / nightclubs	0.1%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improvement to the market	3.5%	28	0.0%	0	3.9%	12	0.0%	0	0.0%	0	12.5%	12	0.0%	0
More / better eating places	1.4%	11	0.0%	0	1.6%	5	0.0%	0	0.0%	0	1.0%	1	0.0%	0
More / better leisure facilities	3.1%	25	0.0%	0	1.0%	3	0.0%	0	5.9%	1	0.0%	0	2.1%	2

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Q32B Aberkenfig		Q32B Bridgend		Q32B Cardiff		Q32B Cowbridge		Q32B Llantrisant		Q32B Maesteg		Q32B Merthyr Tydfil		Q32B Neath		Q32B Pencoed		Q32B Pontyclun		Q32B Pontypridd		Q32B Port Talbot		Q32B Porthcawl		
More / better pubs / night-life	0.8%	6	100.0%	1	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2
More family oriented facilities	0.9%	7	0.0%	0	0.6%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	2.3%	2
More independent shops	15.4%	123	0.0%	0	17.2%	53	0.0%	0	0.0%	0	0.0%	0	24.0%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	2	23.1%	12	10.5%	9
More national multiple (high street chain) retailers	14.3%	114	0.0%	0	18.2%	56	0.0%	0	0.0%	0	0.0%	0	20.8%	20	0.0%	0	0.0%	0	0.0%	0	12.5%	1	20.0%	5	19.2%	10	5.8%	5
More secure children's play areas	0.6%	5	0.0%	0	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Provision of more residential accommodation	0.3%	2	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fewer charity shops	3.6%	29	0.0%	0	3.9%	12	0.0%	0	11.8%	2	0.0%	0	2.1%	2	0.0%	0	50.0%	1	0.0%	0	0.0%	0	0.0%	0	9.6%	5	7.0%	6
More / better public toilets	7.0%	56	0.0%	0	3.9%	12	0.0%	0	0.0%	0	0.0%	0	14.6%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	32.6%	28
More clothes shops	2.6%	21	0.0%	0	1.6%	5	0.0%	0	0.0%	0	0.0%	0	4.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	2	2.3%	2
More service outlets (banks etc)	2.4%	19	0.0%	0	0.6%	2	0.0%	0	5.9%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	2	1.9%	1	0.0%	0
Fewer empty shops	0.8%	6	0.0%	0	1.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Less traffic congestion	2.6%	21	0.0%	0	1.3%	4	5.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	1	0.0%	0	1.2%	1
(Don't know)	4.4%	35	0.0%	0	4.5%	14	5.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	14.3%	1	0.0%	0	16.0%	4	7.7%	4	2.3%	2
(None mentioned)	17.2%	137	0.0%	0	12.0%	37	55.0%	11	23.5%	4	0.0%	0	11.5%	11	0.0%	0	50.0%	1	14.3%	1	37.5%	3	8.0%	2	19.2%	10	7.0%	6
Base:		797		1		308		20		17		2		96		1		2		7		8		25		52		86

## Appendix 4:

Data Tabulations

By Q32B – Part Two

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Q32B Pyle	Q32B Swansea	Q32B Talbot	Q32B Tonypany	Q32B Tonyrefail	Q32B Treorchy	Q32B Aberdare	Q32B Bargoed	Q32B Gelli	Q32B Pentre	Q32B Treherbert
<b>Q32B What is your nearest town centre?</b>												
Aberkenfig (Valleys Gateway)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	38.5%	308	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	2.5%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowbridge	2.1%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llantrisant	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maesteg	12.0%	96	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merthyr Tydfil	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Neath	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pencoed	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontypridd	3.1%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Port Talbot	6.5%	52	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Porthcawl	10.8%	86	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pyle	0.1%	1	100.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea City Centre	0.1%	1	0.0%	0	100.0%	1	0.0%	0	0.0%	0	0.0%	0
Talbot Green Town Centre	4.6%	37	0.0%	0	0.0%	0	100.0%	37	0.0%	0	0.0%	0
Tonypany	5.0%	40	0.0%	0	0.0%	0	0.0%	0	100.0%	40	0.0%	0
Tonyrefail	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	5	100.0%	5
Treorchy	9.6%	77	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	77
Aberdare Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1
Bargoed Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1
Gelli Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1
Pentre Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1
Treherbert Village Centre	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	7
(Don't know / uncertain)	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Base:		800		1		1		37		40		5
										77		1
												1
												1
												1
												7

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Q32B Pyle	Q32B Swansea	Q32B Talbot	Q32B Tonypanydy	Q32B Tonyrefail	Q32B Treorchy	Q32B Aberdare	Q32B Bargoed	Q32B Gelli	Q32B Pentre	Q32B Treherbert
<b>Q32C</b> What things do you think could be improved about that town centre? [MR]												
<i>Not 'Don't know / uncertain' at Q32B</i>												
Better signposting within the centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheaper parking	7.5%	60	0.0%	0	0.0%	0	8.1%	3	2.5%	1	0.0%	0
Improved access for wheelchair and pushchair users	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More accessible car parking	2.9%	23	0.0%	0	0.0%	0	5.4%	2	2.5%	1	20.0%	1
More frequent bus services to the centre	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More frequent train services	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More parking	12.0%	96	0.0%	0	0.0%	0	29.7%	11	12.5%	5	40.0%	2
More priority for pedestrians	1.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More reliable / comfortable bus services	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More reliable train services	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More secure parking	0.3%	2	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0
New / relocated bus stops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better street furniture / floral displays	1.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Cleaner streets / removal of litter	2.3%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improve appearance / environment of centre	5.0%	40	0.0%	0	0.0%	0	2.7%	1	7.5%	3	0.0%	0
Improved security measures / more CCTV / more police	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More control on alcohol / drinkers / drug users	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More control on other anti-social behaviour	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More green spaces / areas	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More shelter from wind / rain	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better choice of shops in general	39.6%	316	0.0%	0	0.0%	0	10.8%	4	57.5%	23	40.0%	2
Better crèche facilities	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better quality of shops	13.7%	109	0.0%	0	0.0%	0	2.7%	1	20.0%	8	0.0%	0
Bigger / better supermarket	3.3%	26	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0
Expand the town centre's colleges / expand university	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fewer bars / nightclubs	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improvement to the market	3.5%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	2
More / better eating places	1.4%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better leisure facilities	3.1%	25	0.0%	0	0.0%	0	8.1%	3	5.0%	2	0.0%	0

## Bridgend Borough Retail Study for Peter Brett Associates

	Total	Q32B Pyle		Q32B Swansea		Q32B Talbot		Q32B Tonypandy		Q32B Tonyrefail		Q32B Treorchy		Q32B Aberdare		Q32B Bargoed		Q32B Gelli		Q32B Pentre		Q32B Treherbert		
More / better pubs / night-life	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More family oriented facilities	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More independent shops	15.4%	123	0.0%	0	0.0%	0	2.7%	1	40.0%	16	0.0%	0	5.2%	4	0.0%	0	0.0%	0	0.0%	0	100.0%	1	28.6%	2
More national multiple (high street chain) retailers	14.3%	114	0.0%	0	0.0%	0	2.7%	1	25.0%	10	0.0%	0	5.2%	4	0.0%	0	0.0%	0	0.0%	0	100.0%	1	14.3%	1
More secure children's play areas	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Provision of more residential accommodation	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fewer charity shops	3.6%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better public toilets	7.0%	56	100.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More clothes shops	2.6%	21	0.0%	0	0.0%	0	8.1%	3	2.5%	1	0.0%	0	5.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More service outlets (banks etc)	2.4%	19	0.0%	0	0.0%	0	0.0%	0	20.0%	8	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	42.9%	3
Fewer empty shops	0.8%	6	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less traffic congestion	2.6%	21	0.0%	0	0.0%	0	10.8%	4	0.0%	0	0.0%	0	13.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	4.4%	35	0.0%	0	0.0%	0	10.8%	4	7.5%	3	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(None mentioned)	17.2%	137	0.0%	0	100.0%	1	21.6%	8	7.5%	3	20.0%	1	45.5%	35	100.0%	1	0.0%	0	0.0%	0	0.0%	0	28.6%	2
Base:		797		1		1		37		40		5		77		1		1		1		1		7



## **Appendix 5:**

Data Tabulations

By Q32B – Part One

(Weighted)

# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Q32B Aberkenfig	Q32B Bridgend	Q32B Cardiff	Q32B Cowbridge	Q32B Llantrisant	Q32B Maesteg	Q32B Merthyr Tydfil	Q32B Neath	Q32B Pencoed	Q32B Pontyclun	Q32B Pontypridd	Q32B Port Talbot	Q32B Porthcawl
<b>Q32B What is your nearest town centre?</b>														
Aberkenfig (Valleys Gateway)	0.1%	1	100.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	40.3%	322	0.0%	0	100.0%	322	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	3.5%	28	0.0%	0	0.0%	0	100.0%	28	0.0%	0	0.0%	0	0.0%	0
Cowbridge	2.9%	23	0.0%	0	0.0%	0	0.0%	0	100.0%	23	0.0%	0	0.0%	0
Llantrisant	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	4	0.0%	0
Maesteg	10.4%	84	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	84	0.0%	0
Merthyr Tydfil	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	1
Neath	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	99.9%	1
Pencoed	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	1.6%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	13
Pontypridd	3.3%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	26
Port Talbot	3.6%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Porthcawl	9.0%	72	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pyle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea City Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Talbot Green Town Centre	6.2%	50	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tonypanyd	7.9%	63	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tonyrefail	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Treorchy	7.8%	63	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberdare Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bargoed Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gelli Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pentre Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Treherbert Village Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / uncertain)	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:	800		1		322		28		23		4		84	
Sample:	800		1		308		20		17		2		96	

# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Q32B Aberkenfig	Q32B Bridgend	Q32B Cardiff	Q32B Cowbridge	Q32B Llantrisant	Q32B Maesteg	Q32B Merthyr Tydfil	Q32B Neath	Q32B Pencoed	Q32B Pontyclun	Q32B Pontypridd	Q32B Port Talbot	Q32B Porthcawl
<b>Q32C</b> What things do you think could be improved about that town centre? [MR]														
<i>Not 'Don't know / uncertain' at Q32B</i>														
Better signposting within the centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheaper parking	8.1%	64	0.0%	0	11.5%	37	11.6%	3	7.9%	2	0.0%	0	2.2%	2
Improved access for wheelchair and pushchair users	0.9%	7	0.0%	0	1.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More accessible car parking	2.4%	19	0.0%	0	3.6%	12	0.0%	0	0.0%	0	0.0%	0	0.6%	1
More frequent bus services to the centre	0.7%	6	0.0%	0	0.8%	3	4.8%	1	3.4%	1	0.0%	0	0.0%	0
More frequent train services	0.3%	2	0.0%	0	0.2%	1	0.0%	0	3.4%	1	0.0%	0	0.0%	0
More parking	15.3%	122	0.0%	0	12.3%	40	10.0%	3	45.0%	10	100.0%	4	5.1%	4
More priority for pedestrians	2.3%	18	0.0%	0	5.7%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More reliable / comfortable bus services	0.7%	6	0.0%	0	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More reliable train services	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More secure parking	0.3%	2	0.0%	0	0.0%	0	0.0%	0	5.8%	1	0.0%	0	0.0%	0
New / relocated bus stops	0.1%	1	0.0%	0	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better street furniture / floral displays	1.9%	16	0.0%	0	3.9%	13	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Cleaner streets / removal of litter	3.9%	31	0.0%	0	6.5%	21	25.5%	7	0.0%	0	0.0%	0	0.7%	1
Improve appearance / environment of centre	4.2%	33	0.0%	0	6.1%	20	0.0%	0	0.0%	0	0.0%	0	5.4%	5
Improved security measures / more CCTV / more police	0.9%	7	0.0%	0	1.6%	5	0.0%	0	0.0%	0	1.0%	1	0.0%	0
More control on alcohol / drinkers / drug users	1.7%	13	0.0%	0	4.1%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More control on other anti-social behaviour	2.2%	17	0.0%	0	5.4%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More green spaces / areas	0.9%	7	0.0%	0	1.8%	6	0.0%	0	0.0%	0	0.0%	0	1.2%	1
More shelter from wind / rain	0.1%	1	0.0%	0	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better choice of shops in general	36.2%	289	0.0%	0	46.1%	148	2.8%	1	7.4%	2	0.0%	0	44.7%	37
Better crèche facilities	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better quality of shops	12.3%	98	0.0%	0	14.6%	47	0.0%	0	7.4%	2	0.0%	0	18.7%	16
Bigger / better supermarket	3.4%	27	0.0%	0	1.7%	5	0.0%	0	0.0%	0	75.2%	3	4.1%	3
Expand the town centre's colleges / expand university	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fewer bars / nightclubs	0.1%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improvement to the market	3.3%	27	0.0%	0	4.3%	14	0.0%	0	0.0%	0	11.0%	9	0.0%	0
More / better eating places	1.6%	12	0.0%	0	1.5%	5	0.0%	0	0.0%	0	0.5%	0	0.0%	0
More / better leisure facilities	4.2%	34	0.0%	0	1.2%	4	0.0%	0	12.0%	3	0.0%	0	2.1%	2

## Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Q32B Aberkenfig		Q32B Bridgend		Q32B Cardiff		Q32B Cowbridge		Q32B Llantrisant		Q32B Maesteg		Q32B Merthyr Tydfil		Q32B Neath		Q32B Pencoed		Q32B Pontyclun		Q32B Pontypridd		Q32B Port Talbot		Q32B Porthcawl				
More / better pubs / night-life	1.5%	12	100.0%	1	2.7%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2
More family oriented facilities	0.8%	6	0.0%	0	1.3%	4	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	11.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
More independent shops	12.9%	103	0.0%	0	14.8%	48	0.0%	0	0.0%	0	0.0%	0	19.7%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.7%	2	14.2%	4	8.8%	6		
More national multiple (high street chain) retailers	15.6%	124	0.0%	0	20.9%	67	0.0%	0	0.0%	0	0.0%	0	25.1%	21	0.0%	0	0.0%	0	0.0%	0	7.2%	1	18.6%	5	22.4%	6	3.9%	3		
More secure children's play areas	0.6%	5	0.0%	0	1.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Provision of more residential accommodation	0.3%	2	0.0%	0	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1		
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fewer charity shops	3.1%	25	0.0%	0	3.7%	12	0.0%	0	9.2%	2	0.0%	0	1.3%	1	0.0%	0	50.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	1	9.4%	7		
More / better public toilets	5.4%	43	0.0%	0	4.0%	13	0.0%	0	0.0%	0	0.0%	0	9.1%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	30.3%	22		
More clothes shops	2.2%	18	0.0%	0	1.3%	4	0.0%	0	0.0%	0	0.0%	0	4.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	1	1.6%	1		
More service outlets (banks etc)	2.7%	21	0.0%	0	0.4%	1	0.0%	0	4.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.4%	5	0.9%	0	0.0%	0		
Fewer empty shops	0.6%	5	0.0%	0	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0		
Less traffic congestion	2.3%	18	0.0%	0	0.4%	1	10.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	2.8%	2		
(Don't know)	4.2%	33	0.0%	0	3.4%	11	3.3%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	16.2%	1	0.0%	0	13.9%	4	5.1%	1	1.7%	1		
(None mentioned)	16.6%	132	0.0%	0	12.2%	39	43.6%	12	15.7%	4	0.0%	0	13.8%	12	0.0%	0	50.0%	0	27.9%	1	20.7%	3	5.0%	1	25.9%	7	5.2%	4		
Weighted base:		797		1	322		28		23		4		84		1		1		5		13		26		28		72			
Sample:		797		1	308		20		17		2		96		1		2		7		8		25		52		86			

## **Appendix 6:**

Data Tabulations

By Q32B – Part Two

(Weighted)

## Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Q32B Pyle	Q32B Swansea	Q32B Talbot	Q32B Tonypany	Q32B Tonyrefail	Q32B Treorchy	Q32B Aberdare	Q32B Bargoed	Q32B Gelli	Q32B Pentre	Q32B Treherbert
<b>Q32B What is your nearest town centre?</b>												
Aberkenfig (Valleys Gateway)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Town Centre	40.3%	322	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	3.5%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowbridge	2.9%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llantrisant	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maesteg	10.4%	84	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merthyr Tydfil	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Neath	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pencoed	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontyclun	1.6%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontypridd	3.3%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Port Talbot	3.6%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Porthcawl	9.0%	72	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pyle	0.0%	0	99.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea City Centre	0.1%	0	0.0%	0	100.1%	0	0.0%	0	0.0%	0	0.0%	0
Talbot Green Town Centre	6.2%	50	0.0%	0	0.0%	0	100.0%	50	0.0%	0	0.0%	0
Tonypany	7.9%	63	0.0%	0	0.0%	0	100.0%	63	0.0%	0	0.0%	0
Tonyrefail	0.7%	6	0.0%	0	0.0%	0	0.0%	0	100.0%	6	0.0%	0
Treorchy	7.8%	63	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	63
Aberdare Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	99.9%	0
Bargoed Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	2
Gelli Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	1
Pentre Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Treherbert Village Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / uncertain)	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:	800		0	0	50	63	6	63	0	2	1	1
Sample:	800		1	1	37	40	5	77	1	1	1	7

# Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

February 2019

	Total	Q32B Pyle	Q32B Swansea	Q32B Talbot	Q32B Tonypanydy	Q32B Tonyrefail	Q32B Treorchy	Q32B Aberdare	Q32B Bargoed	Q32B Gelli	Q32B Pentre	Q32B Treherbert
<b>Q32C</b> What things do you think could be improved about that town centre? [MR]												
<i>Not 'Don't know / uncertain' at Q32B</i>												
Better signposting within the centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheaper parking	8.1%	64	0.0%	0	0.0%	0	6.4%	3	2.5%	2	0.0%	0
Improved access for wheelchair and pushchair users	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More accessible car parking	2.4%	19	0.0%	0	0.0%	0	3.4%	2	2.5%	2	19.3%	1
More frequent bus services to the centre	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More frequent train services	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More parking	15.3%	122	0.0%	0	0.0%	0	35.8%	18	13.1%	8	35.8%	2
More priority for pedestrians	2.3%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More reliable / comfortable bus services	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More reliable train services	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More secure parking	0.3%	2	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0
New / relocated bus stops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better street furniture / floral displays	1.9%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1
Cleaner streets / removal of litter	3.9%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improve appearance / environment of centre	4.2%	33	0.0%	0	0.0%	0	1.1%	1	5.9%	4	0.6%	0
Improved security measures / more CCTV / more police	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More control on alcohol / drinkers / drug users	1.7%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More control on other anti-social behaviour	2.2%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More green spaces / areas	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More shelter from wind / rain	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better choice of shops in general	36.2%	289	0.0%	0	0.0%	0	8.0%	4	54.5%	34	47.6%	3
Better crèche facilities	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better quality of shops	12.3%	98	0.0%	0	0.0%	0	5.5%	3	14.3%	9	0.0%	0
Bigger / better supermarket	3.4%	27	0.0%	0	0.0%	0	5.5%	3	0.0%	0	6.3%	4
Expand the town centre's colleges / expand university	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fewer bars / nightclubs	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improvement to the market	3.3%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2
More / better eating places	1.6%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better leisure facilities	4.2%	34	0.0%	0	0.0%	0	19.2%	10	2.9%	2	0.6%	0

## Bridgend Borough Retail Study for Peter Brett Associates

Weighted:

	Total	Q32B Pyle	Q32B Swansea	Q32B Talbot	Q32B Tonypany	Q32B Tonyrefail	Q32B Treorchy	Q32B Aberdare	Q32B Bargoed	Q32B Gelli	Q32B Pentre	Q32B Treherbert
More / better pubs / night-life	1.5%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More family oriented facilities	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More independent shops	12.9%	103	0.0%	0	0.0%	0	3.2%	2	31.3%	20	0.0%	0
More national multiple (high street chain) retailers	15.6%	124	0.0%	0	0.0%	0	1.9%	1	20.4%	13	0.0%	0
More secure children's play areas	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Provision of more residential accommodation	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fewer charity shops	3.1%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better public toilets	5.4%	43	99.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More clothes shops	2.2%	18	0.0%	0	0.0%	0	7.7%	4	1.5%	1	0.0%	0
More service outlets (banks etc)	2.7%	21	0.0%	0	0.0%	0	0.0%	0	17.0%	11	0.0%	0
Fewer empty shops	0.6%	5	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0
Less traffic congestion	2.3%	18	0.0%	0	0.0%	0	8.0%	4	0.0%	0	0.0%	0
(Don't know)	4.2%	33	0.0%	0	0.0%	0	8.0%	4	14.7%	9	0.0%	0
(None mentioned)	16.6%	132	0.0%	0	100.1%	0	26.7%	13	4.4%	3	16.5%	1
Weighted base:	797		0	0	50	63	6	63	0	2	1	1
Sample:	797		1	1	37	40	5	77	1	1	1	7



## Appendix 7:

### Other Responses – Summary Counts

**Bridgend Borough Retail Study  
for Peter Brett Associates  
'Other' Responses**

**Q33 In which city, town or out-of-town location does your household spend most money on restaurants & cafes?**

Porth Town Centre	4
Aberdare Town Centre	2
Brackla Local Centre	2
Miskin Village Centre	2
Ystrad Village Centre	2
Carmarthen Town Centre	1
Corntown Village Centre	1
Creigiau Local Centre	1
Cymmer Village Centre	1
High Wycombe Town Centre	1
Kenfig Village Centre	1
Libanus Village Centre	1
Llanharan Village Centre	1
Nantgarw Village Centre	1
North Cornelly Village Centre	1
Penderyn Village Centre	1
Pentre Village Centre	1
South Cornelly Village Centre	1
Ton Pentre Village Centre	1
Treforest Village Centre	1
Wick Village Centre	1
Windsor Town Centre	1
<b>Total</b>	<b>29</b>

**Q34 In which city, town or out-of-town location does your household spend most money on pubs / bars / nightclubs / music venues?**

Ystrad Village Centre	5
Brackla Local Centre	4
Wick Village Centre	3
Aberthin Village Centre	2
Bryнна Village Centre	2
Central London	2
Cymmer Village Centre	2
Groes-faen Village Centre	2
Southerndown Village Centre	2
Bettws Local Centre	1
Blackmill Village Centre	1
Broughton District Centre	1
Carmarthen Town Centre	1
Clydac Village Centre	1
Colwinston Village Centre	1
Coychurch Village Centre	1
Cwmparc Village Centre	1
Gelli Village Centre	1
Gilfach Goch Village Centre	1
Great Malvern Local Centre	1
Laleston Village Centre	1
Llanharry Village Centre	1
Llwynypia Village Centre	1
Newton Village Centre	1
Pentre Village Centre	1
Tynewydd Village Centre	1
<b>Total</b>	<b>41</b>

**Q36 In which city, town or out-of-town location does your household spend most money on health & fitness?**

Vale Resort, Hensol Park, Hensol, Vale of Glamorgan	7
Llantrisant Leisure Centre, Park View, Llantrisant, Pontyclun	6
Cardiff City Centre	3
Cowbridge Leisure Centre, The Broad Shoard, Cowbridge	3
Talbot Green Town Centre	3
Awel y Mor Community Centre, Wellfield Avenue, Porthcawl	1
Best Western Heronston Hotel & Spa, Ewenny Road, Cardiff	1
Bridgend College, Cowbridge Road, Bridgend	1
Cardiff Marriott Hotel, Mill Lane, Cardiff	1
Coed-y-mwstwr Golf Club, Bryn Road, Coychurch, Bridgend	1
Elite Fitness, Fairwater Industrial Estate, Norbury Road, Cardiff	1
Ogmore Vale Village Centre	1
Pontyclun Town Centre	1
Pontypridd Village Centre	1
Porthcawl Town Centre	1
Sport Wales National Centre, Sophia Close, Cardiff	1
Tonyrefail Leisure Centre, Waunrhydd Road, Tonyrefail	1
Trecco Bay Holiday Park, Porthcawl	1
Treorchu Village Centre	1
Unique Fitness, Unnamed Road, Maesteg	1
<b>Total</b>	<b>37</b>

**Q38 In which city, town, or out-of-town location does your household spend most money on family entertainment or recreation? (i.e. ten pin bowling, ice skating, children's play centres, museums, visitor attractions etc.)**

Nantgarw Village Centre	5
Central London	3
Aberdare Town Centre	1
Ton Pentre Village Centre	1
Treforest Village Centre	1
Windsor Town Centre	1
<b>Total</b>	<b>12</b>

## **Appendix 8:**

### Composite Analysis (Incl. SFT)

# 150119 Bridgend incl. SFT Results Summary

## Percentage of Spend by Zone

		Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
<b>Composite food</b>										
1	Zone 1	31.2%	79.7%	40.1%	13.1%	50.7%	16.4%	8.3%	0.2%	17.7%
2	Zone 2	3.5%	0.1%	26.9%	0.0%	0.7%	0.1%	0.3%	0.0%	1.5%
3	Zone 3	9.8%	0.0%	0.2%	70.7%	1.8%	0.0%	0.9%	15.9%	2.5%
4	Zone 4	7.4%	7.0%	8.9%	6.5%	27.6%	5.0%	0.9%	0.2%	5.7%
5	Zone 5	15.2%	10.5%	3.3%	2.0%	12.3%	57.1%	9.9%	4.1%	2.2%
6	Zone 6	9.1%	0.0%	0.0%	0.0%	0.0%	0.6%	44.1%	13.9%	0.0%
7	Zone 7	6.0%	0.0%	0.0%	0.2%	0.0%	0.0%	13.8%	43.1%	0.5%
8	Zone 8	4.3%	0.3%	13.0%	0.0%	0.5%	0.4%	0.0%	1.9%	41.2%
0	Outside catchment area	10.7%	2.4%	5.0%	6.8%	1.5%	15.3%	19.6%	17.4%	22.3%
X	SFT	2.8%	0.0%	2.6%	0.7%	4.8%	5.2%	2.3%	3.4%	6.6%
<b>Composite Non-food</b>										
1	Zone 1	23.1%	44.8%	26.9%	25.5%	35.6%	11.5%	7.3%	4.7%	27.7%
2	Zone 2	1.4%	0.3%	9.4%	0.0%	0.4%	0.0%	0.1%	0.5%	1.3%
3	Zone 3	2.1%	0.1%	0.0%	14.4%	0.2%	0.1%	0.0%	5.4%	0.4%
4	Zone 4	7.2%	10.4%	7.4%	5.9%	12.9%	4.5%	5.6%	3.7%	5.7%
5	Zone 5	12.2%	5.2%	2.7%	3.5%	6.7%	34.3%	17.1%	6.9%	4.6%
6	Zone 6	2.6%	0.0%	0.0%	0.8%	0.0%	0.7%	11.5%	4.3%	0.0%
7	Zone 7	1.3%	0.0%	0.0%	0.1%	0.0%	0.0%	2.7%	12.0%	0.1%
8	Zone 8	2.9%	0.3%	4.4%	2.1%	1.1%	0.6%	0.3%	6.7%	21.8%
0	Outside catchment area	24.5%	17.3%	20.0%	26.1%	16.1%	30.3%	30.7%	32.6%	20.5%
X	SFT	22.8%	21.6%	29.2%	21.5%	27.0%	18.1%	24.6%	23.2%	17.9%

## Appendix 9:

### Composite Analysis (Excl. SFT)





## **Appendix 10:**

### Sample Questionnaire

**Bridgend Borough Retail Study**

Good morning / afternoon / evening, I am ..... from NEMS market research and we are conducting a short survey in your area about shopping on behalf of Bridgend Borough Council. The survey will help the authority understand what the future shopping and leisure needs of the wider area will be. Do you have time to answer some questions? It will take about five minutes.

**QA Are you the main shopper in your household?**

- 1 Yes
- 2 No - Ask if main shopper is available, if not - close

**PC Could you please provide your post code?**  
RECORD POSTCODE

First we have a few questions about where you undertake food and groceries shopping. In answering these questions the location may be a supermarket, a smaller store or independent retailer, or a town centre, or could be the use of facilities such as the Internet.

**Q01 Where did your household last undertake a main food and grocery purchase?**  
DO NOT PROMPT. ONE ANSWER ONLY.

#Food Food Shopping List

**Q02 And where did you shop the time before that (was it the same, or different, and if so, please specify)?**

DO NOT PROMPT. ONE ANSWER ONLY.

#Food Food Shopping List

**Q03 What form of transport do you use to visit your main food shopping destination?**  
DO NOT PROMPT. ONE ANSWER ONLY.

- 1 Car - Driver
- 2 Car - Passenger
- 3 Bus
- 4 Cycle
- 5 Disabled vehicle (e.g. mobility scooter)
- 6 Taxi
- 7 Train
- 8 Walk
- A Other (PLEASE WRITE IN)
- B (Don't know / varies)

**Q04 When your household undertakes its main food and grocery spend (STORE MENTIONED AT Q01) does it visit other shops, leisure or service outlets on the same shopping trips? And if so which ones?**  
DO NOT READ OUT. CAN BE MULTICODED.

- 1 Yes - other food shops
- 2 Yes - other non food shops (clothing, footwear, electrical etc)
- 3 Yes - pubs, restaurants or cafes
- 4 Yes - financial service (i.e. bank, building society)
- 5 Yes - other service (e.g. hairdresser, travel agent, estate agent)
- 6 Yes - leisure activity
- 7 Yes - other (PLEASE WRITE IN)
- 8 (No)
- 9 (Don't know / varies)

**Q05 Approximately how much money does your household spend per week on its main food and groceries shop at (STORE MENTIONED AT Q01)?**  
PLEASE WRITE IN TO THE NEAREST £

- X To the nearest £: (PLEASE WRITE IN)
- Y (Don't know / varies)
- Z (Refused)

**Q06 How often does your household normally visit its main food and grocery shopping destination (STORE MENTIONED AT Q01)?**  
ONE ANSWER ONLY.

- 1 Everyday
- 2 5 - 6 times a week
- 3 3 - 4 times a week
- 4 Twice a week
- 5 Once a week
- 6 Once every two weeks
- 7 Once a month
- 8 Less often
- 9 (Don't know / varies)

**Q07 Where did your household last undertake your 'top-up' food and grocery purchases? (i.e smaller/ 'basket' shopping purchases which are not part of your main food and groceries shop)**  
DO NOT PROMPT. ONE ANSWER ONLY.

#Food Food Shopping List

**Q08** And where did you go for top-up food shopping the time before that?  
DO NOT PROMPT. ONE ANSWER ONLY.

#Food Food Shopping List

**Q09** Approximately how much money does your household spend per week on top-up food and groceries shopping (STORE MENTIONED AT Q07)?  
PLEASE WRITE IN TO THE NEAREST £

X To the nearest £: (PLEASE WRITE IN)  
Y (Don't know / varies)  
Z (Refused)

Not answered by those who said 'Internet / delivered' at Q07

**Q09A** When your household undertakes its top-up food and grocery spend (STORE MENTIONED AT Q07) does it visit other shops, leisure or service outlets on the same shopping trips? And if so which ones?  
DO NOT READ OUT. CAN BE MULTICODED.

1 Yes - other food shops  
2 Yes - other non food shops (clothing, footwear, electrical etc)  
3 Yes - pubs, restaurants or cafes  
4 Yes - financial service (i.e. bank, building society)  
5 Yes - other service (e.g. hairdresser, travel agent, estate agent)  
6 Yes - leisure activity  
7 Yes - other (PLEASE WRITE IN)  
8 (No)  
9 (Don't know / varies)

**Q10** Does your household also spend money on food and groceries in small shops or market stalls? (i.e., not supermarkets)  
DO NOT PROMPT. ONE ANSWER ONLY.

1 Yes  
2 No

GO TO Q11  
GO TO Q13

**Q11** Where are these small shops or market stalls located?  
DO NOT PROMPT. ONE ANSWER ONLY.

#Food Food Shopping List - NOTE ONLY THE LOCAL STORES LIST WILL SHOW ON THIS QUESTION

**Q12** Approximately how much money does your household spend per week on food and groceries in these small shops?  
PLEASE WRITE IN TO THE NEAREST £

X To the nearest £: (PLEASE WRITE IN)  
Y (Don't know / varies)  
Z (Refused)

**Q13** Approximately what proportion of your household's total spending on all food and grocery goods is done using the Internet?  
PLEASE WRITE IN TO THE NEAREST %

1 To the nearest %: (PLEASE WRITE IN)  
X (Don't know / varies)  
Y (Refused)

We now have a few questions about where you go for non-food shopping. In answering these questions the location may be a town centre, a retail park, or a free standing store, or could be facilities such as the Internet, TV / interactive shopping or use of a home catalogue.

**Q14** So, speaking as an individual, can you tell me where you last made a purchase of clothes or shoes?  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF 'MARKET STALL' PROBE FOR LOCATION

#NonFood Non Food List

**Q15** How often do you visit (LOCATION MENTIONED AT Q14) for clothes or shoes shopping?  
ONE ANSWER ONLY.

1 Everyday  
2 5 - 6 times a week  
3 3 - 4 times a week  
4 Twice a week  
5 Once a week  
6 Once every two weeks  
7 Once a month  
8 Once every two months  
9 3 or 4 times a year  
A Twice a year  
B Once a year  
C Less often  
D (Don't know / varies)

Skip Q16 if shop via 'Internet', 'Catalogue' or 'TV shopping' at Q14:

**Q16 How do you normally travel to (LOCATION MENTIONED AT Q14)?**  
ONE ANSWER ONLY.

- 1 Car - Driver
- 2 Car - Passenger
- 3 Bus
- 4 Cycle
- 5 Disabled vehicle (e.g. mobility scooter)
- 6 Taxi
- 7 Train
- 8 Walk
- A Other (PLEASE WRITE IN)
- B (Don't know / varies)

**Q17 And the time before that, where did your household go to make a purchase of clothes or shoes?**  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF 'MARKET STALL' PROBE FOR LOCATION

#NonFood Non Food List

**Q18 Now can you tell me where your household last made a purchase of furniture, carpets, or soft household furnishings?**  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF 'MARKET STALL' PROBE FOR LOCATION

#NonFood Non Food List

**Q19 And the time before that, where did your household go to make a purchase of furniture, carpets, or soft household furnishings?**  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF 'MARKET STALL' PROBE FOR LOCATION

#NonFood Non Food List

**Q20 Now can you tell me where your household last made a purchase of DIY and decorating goods?**  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF 'MARKET STALL' PROBE FOR LOCATION

#NonFood Non Food List

**Q21 And the time before that, where did your household go to make a purchase of DIY and decorating goods?**  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF 'MARKET STALL' PROBE FOR LOCATION

#NonFood Non Food List

**Q22 Can you tell me where you or your household last made a purchase of electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones or computers?**  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF 'MARKET STALL' PROBE FOR LOCATION

#NonFood Non Food List

**Q23 And the time before that, where you or your household last made a purchase of electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones or computers?**  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF 'MARKET STALL' PROBE FOR LOCATION

#NonFood Non Food List

**Q24 Can you tell me where you or your household last made a purchase of domestic appliances, such as washing machines, fridges or cookers?**  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF 'MARKET STALL' PROBE FOR LOCATION

#NonFood Non Food List

**Q25 And the time before that, where you or your household last made a purchase of domestic appliances, such as washing machines, fridges or cookers?**  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF 'MARKET STALL' PROBE FOR LOCATION

#NonFood Non Food List

**Q26 Can you tell me where you or your household last made a purchase of health, beauty or chemist items?**  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF 'MARKET STALL' PROBE FOR LOCATION

#NonFood Non Food List

**Q27 And the time before that, where did you or your household go to make a purchase of health, beauty or chemist items?**  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF 'MARKET STALL' PROBE FOR LOCATION

#NonFood Non Food List

**Q28 Can you tell me where you or your household last made a purchase of recreational goods such as sports equipment, bicycles, musical instruments or toys?**  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF 'MARKET STALL' PROBE FOR LOCATION

#NonFood Non Food List

**Q29 And the time before that, where did you or your household go to make a purchase of recreational goods such as sports equipment, bicycles, musical instruments or toys?**  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF 'MARKET STALL' PROBE FOR LOCATION

#NonFood Non Food List

**Q30 And where was the last purchase of other non-food items such as books, CDs, jewellery or china and glass items?**  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF 'MARKET STALL' PROBE FOR LOCATION

#NonFood Non Food List

**Q31 And the time before that, where did you or your household go to make a purchase of other non-food items such as books, CDs, jewellery or china and glass items?**  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF 'MARKET STALL' PROBE FOR LOCATION

#NonFood Non Food List

**Q32A When undertaking shopping via the internet, how do you NORMALLY receive the items you have purchased?**  
ONE ANSWER ONLY. PROMPT IF NECESSARY.

- 1 Delivery to home
- 2 Delivery to another address e.g neighbour / work (but not a store or collection point)
- 3 Delivered to store (Click & collect)
- 4 Delivered to a collection point (e.g third party newsagent or convenience store etc.)
- 5 Other (PLEASE WRITE IN)
- 6 (Don't know / can't remember / varies)
- 7 (Don't shop online)

**Q32B What is your nearest town centre?**  
DO NOT PROMPT. ONE ANSWER ONLY.

#Towns Town Centre list

Go to Q33 if 'Don't know':

**Q32C What things do you think could be improved about that town centre?**  
DO NOT PROMPT. SELECT ALL THAT APPLY.

- 001 Better signposting within the centre
- 002 Cheaper parking
- 003 Improved access for wheelchair and pushchair users
- 004 More accessible car parking
- 005 More frequent bus services to the centre
- 006 More frequent train services
- 007 More parking
- 008 More priority for pedestrians
- 009 More reliable / comfortable bus services
- 010 More reliable train services
- 011 More secure parking
- 012 New / relocated bus stops
- 013 Better street furniture / floral displays
- 014 Cleaner streets / removal of litter
- 015 Improve appearance / environment of centre
- 016 Improved security measures / more CCTV / more police
- 017 More control on alcohol / drinkers / drug users
- 018 More control on other anti-social behaviour
- 019 More green spaces / areas
- 020 More shelter from wind / rain
- 021 Better choice of shops in general
- 022 Better crèche facilities
- 023 Better quality of shops
- 024 Bigger / better supermarket
- 025 Expand the town centre's colleges / expand university
- 026 Fewer bars / nightclubs
- 027 Improvement to the market
- 028 More / better eating places
- 029 More / better leisure facilities
- 030 More / better pubs / night-life
- 031 More family oriented facilities
- 032 More independent shops
- 033 More national multiple (high street chain) retailers
- 034 More secure children's play areas
- 035 Provision of more residential accommodation
- 036 Other (PLEASE WRITE IN)
- 037 (Don't know)
- 038 (None mentioned)

Finally, I am going to ask a few questions on destinations for leisure and cultural activities.

**Q33** In which city, town or out-of-town location does your household spend most money on restaurants & cafes?

DO NOT READ OUT. ONE ANSWER ONLY.

#Leisure Leisure List

**Q34** In which city, town or out-of-town location does your household spend most money on pubs / bars / nightclubs / music venues?

DO NOT READ OUT. ONE ANSWER ONLY.

#Leisure Leisure List

**Q35** Where does your household spend most money on the cinema / theatre?

DO NOT PROMPT. ONE ANSWER ONLY.

#CinThea Cinema & Theatre List

**Q36** In which city, town or out-of-town location does your household spend most money on health & fitness?

DO NOT PROMPT. ONE ANSWER ONLY.

#Health Health & Fitness List

**Q37** In which city, town, or out-of-town location does your household spend most money on bingo / casinos?

DO NOT READ OUT. ONE ANSWER ONLY.

#Bingo Bingo & Casino List

**Q38** In which city, town, or out-of-town location does your household spend most money on family entertainment or recreation? (i.e. ten pin bowling, ice skating, children's play centres, museums, visitor attractions etc.)

DO NOT PROMPT. ONE ANSWER ONLY.

#Leisure Leisure List

**GEN** Gender of respondent:  
CODE FROM OBSERVATION

1 Male  
2 Female

**AGE** Could I ask how old you are please?  
ONE ANSWER ONLY. DO NOT READ OUT.

1 18 to 24  
2 25 to 34  
3 35 to 44  
4 45 to 54  
5 55 to 64  
6 65 +  
7 (Refused)

**Thank & close.**