Swansea City Centre:

Strategic Framework

Technical Appendices

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Swansea City Centre: Strategic Framework

Technical Appendices comprise the following:

Swansea City Centre: Strategic Framework

Technical Appendix 1

STRATEGIC AND SOCIO-ECONOMIC ISSUES

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Swansea City Centre: Strategic Framework

Technical Appendix 1: STRATEGIC AND SOCIO-ECONOMIC ISSUES

1.1 Socio-Economic Baseline (June 2005)

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1 CITY CENTRE REGENERATION AND THE EXPERIENCE OF CORE CITIES

1.1 A key reference point for the study towards the Strategic Framework for Swansea City Centre is the experience of regeneration of other city centres in the UK, and particularly of work on "Core Cities". This is not intended to imply that Swansea should be treated exactly as an English Core City (there are differences as well as similarities) or that all Core City experience is directly replicable. However, the research and initiatives conducted in recent years does provide some useful indicators and is helpful in structuring our research and strategy development work.

The Role of Cities and City Centres

1.2 In the post-industrial economy, the greatest and growing share of national wealth, and virtually all net new employment, is created by service activity. This trajectory of change is likely to continue in the medium to longer term. Cities which grew up in response to industrialisation have had to find new means of generating wealth and jobs - and city centres have had to respond to the new economic roles and new types of businesses, employment and workforces found in their hinterlands.

1.3 A large and growing share of the wealth created by service activity is generated by knowledge-based and consumer services - the kinds of activities which locate primarily in offices and shops, but also (particularly in the case of public services) through new types of facilities. The central areas of cities have a unique role in this new economy, because they are able offer valuable externalities to these knowledge-based and consumer- or customer-focussed service activities; the benefits arise from concentration and critical mass that are not available in other locations.

1.4 City centres generate these beneficial externalities because they are uniquely capable of accommodating the scale, concentration and mix of civic, employment, shopping, leisure and cultural activity upon which much of the service economy depends.

1.5 Concentration of business and spending provides the customer base needed to support a diverse range of shops, restaurants and other services and generates a critical mass of business opportunities, markets and investment potential. Pressures on land created by concentration can raise property values to levels needed to attract investment and make it feasible to invest and re-invest in response to changing markets and fashions.

1.6 Concentration supports larger labour markets, particularly those with skills appropriate to the modern economy, and the development of infrastructure (including transport and communications infrastructure) which aids competitive response to consumer and business markets. Concentration creates natural surveillance that may help to keep crime rates down, removing an external cost and deterrent to city centre use.

1.7 Research into the purposes of our post-industrial cities, the part played by their central areas and the characteristics which underpin the most successful provide both a guide to strategic issues for consideration in Swansea, and an agenda for our research at this early stage of the study. Particularly pertinent in the work on "Core Cities" which has been developing in England since 1995. Eight cities (Birmingham, Bristol, Leeds, Liverpool, Manchester, Newcastle, Nottingham, and Sheffield) are working together and with Regional Development Agencies and government departments to consider how they can help deliver greater prosperity for the people of their own cities, their wider regions and the country as a whole. These are larger cities in the UK context, forming a "second tier" to the capital cities, but cities in the "third tier" (such as Coventry, Southampton, Leicester, Hull, Derby, Reading) appear to be following a similar pattern and are experiencing a similar renaissance for similar reasons.

Core Cities

1.8 The initial Core Cities report also laid out research evidence showing the pivotal role of cities in advanced regional and national economies – cities acting as economic focii where the creation and application of unique knowledge is of greater significance than exploitation of natural resources or mass production.

1.9 More recent research1 into the roles and characteristics of post-industrial cities provides further evidence of how successful cities can also deliver policy goals on a broader social and environmental scale. There is a potential chain reaction which can follow from a high level commitment to strengthen a city's knowledge base as the launch for stronger economic performance and a distinctive external profile. The reasoning is based on the following factors:

- Creativity and innovation are strengthened and enriched when key functions are located close together. So spatial policies which prioritise higher densities for urban core development will directly support the growth of knowledge assets and the higher value economic functions that these attract. This in turn produces a stronger property market for renewal and upgrading of the inner urban areas
- Knowledge based economic functions seeking to locate near to the vibrancy of the urban centre will progressively develop and upgrade the 'urban collar' areas. This reduces perceptions of sharp distinctions between the centre and the suburbs, and also reduces pressures for rural and green belt locations
- Prioritising the urban core as a city's key economic crucible creates a positive climate for the renewal and enrichment of inner urban communities. This in turn puts a major responsibility on cities to develop innovative approaches to education, skills, employability and the design of public buildings and realm.

1.10 Many of the objectives of the Core Cities Group2 have a high resonance with the proposed future direction of Swansea City as described in strategies and plans for the city . These "Core City objectives" are:

- To strengthen and promote the distinctive role of core cities as drivers of regional and national economic growth
- To enhance the European and international competitiveness of the core cities
- To contribute to the development of national and European urban and economic policy as it affects core cities and the regions they serve
- To ensure all citizens in core city regions, particularly those living in deprived communities, benefit from regional and national economic growth
- To ensure that citizens, communities and businesses in core cities and their regions benefit from a high quality and sustainable environment
- To ensure that the wider regional areas are involved with, and benefit from, the work progresses by core cities

1.11 The Core Cities Group has identified an initial set of "success factors" characterising a "competitive core city" - i.e. a major regional city which has achieved a distinctive urban renaissance and can expect to compete with leading Continental cities to attract international businesses3. The following identified success factors are particularly relevant to Swansea City Centre, and are already present in the framework of policies, strategies and plans within which the future development of the City Centre is evolving:

[1] Cities, Regions and Competitiveness – Second Report from the Working Group of Government Departments, The Core Cities and the Regional Development Agencies, June 2003

[2] www.corecities.com
[3] Cities, Regions and Competitiveness – Interim Report – Core Cities Working Group, 2002

- A city of European distinctiveness (eg see the Swansea Community Plan which has a vision of Swansea as a distinctive European City by 2020)
- Nationally and internationally recognised facilities for events (eg see the role of Swansea as Wales' second city set out in the Wales Spatial Plan)
- Sophisticated cultural infrastructure and services (eg see the Culture Strategy for Wales which sees Swansea as playing an essential role as the centre of culture for South West Wales)
- A wide range of high quality residential choices (eg see the Unitary Development Plan which places a priority on the City Centre and Waterfront area for housing)
- A reputation for environmental excellence and responsibility (eg see the Unitary Development Plan which aims to create a healthy, attractive and ecologically rich society)
- An inclusive and diverse society (eg see the National Economic Development Strategy which aims to create strong communities, and the Community Plan which has the vision of Swansea as a city 'where everyone matters')

Key Factors

1.12 Given this resonance in the Core Cities work with the aspirations of the Swansea partners, evidence that thriving city centres are essential to the development of modern sub-regional economies, and that a number of key factors can be identified as critical to the success of city centre and sub-regional development, we are focusing our work for the Strategic Framework on these key factors.

1.13 Key factors on the demand side that correlate with post-industrial urban success are apparently the presence of:

- *higher order consumer services* (retailing, leisure, culture and other enterainment functions) coupled with producer service activity, with businesses exporting their knowledge and services as well as serving local markets; and *high-value knowledge based production* to generate wealth and jobs (and provide markets for producer services)
- *a significant city centre residential population* - with a balanced social mix, to provide an attractive local labour market, a demanding customer market for goods and services, and to maintain vitality outside office hours
- *concentration* - a mix and density of buildings and activities which stimulates face-to-face contact, inter-trading, competitive intensity, and labour market strengths what are uniquely available in a city centre

1.14 On the supply side, the main "input" elements appear to be:

- *skills* - a quality workforce with skills at all educational levels, but particularly including graduates and post-graduates to support the knowledge economy
- *infrastructure* :
  - good quality, available sites and premises to modern standards
  - transport and IT to meet the needs of the modern economy
  - major university and FE institutions, both as a source of skilled labour but also as a focus for knowledge development, knowledge-intensive business, R&D and "spin-off" economy
  - distinctive heritage assets
  - modern cultural and leisure facilites
  - (possibly, "iconic" buildings and facilities)
- *services* - good quality hospitals and schools, and other aspects of public service delivery

- *environment* - "quality of life", good quality housing, good design in the built environment, good maintenance - and an attractive "public realm"
- *investment* - by private and public sectors (including private households) in development of new, high quality premises, facilities and infrastructure
- *good governance* - high quality local government, effective partnership working (and appropriate partnership structures) - with a clear, appropriate and cohesive strategy for the City and City Centre

1.15 These themes will be pursued throughout the study for the Strategic Framework, and developed particularly in response to the situation in Swansea. The list of key factors provides a useful checklist of issues which need to be considered throughout.

Baseline Issues

1.16 This baseline studies were therefore structured to reflect and inform this thinking to provide a summary of relevant data, short reviews of relevant current strategies and policies and summary comment. We particularly note the evidence from other cities that it is important to provide a strong retail offer, linked to good cultural and leisure opportunities, in a city centre with high quality buildings and an attractive public realm, and a vibrant mix of uses including housing, office employment and shops and services.

2 SOCIO-ECONOMIC INFORMATION

2.1 Annex One contains data to provide a summary of socio-economic issues in relation to the City Centre, and comparisons to the wider contextual area. Data is drawn largely from standard official sources, to provide a basis for accurate comparisons between areas and over time.

2.2 Some key issues are indicated by that data.

Summary Socio-Economic Issues

- The overall population of the City Centre Study area is 5,694, in 3,607 households. This includes 3,797 residents of working age, and 2,271 economically active residents, and compares to a population of the City and County of Swansea of 221,823.
- The population of the Travel to Work area around Swansea (and including Swansea) is 272,182; and of South West Wales, 639,046. Nearly 1.5m people live within an hour's drive time of the City Centre.
- By comparison, there are approximately 24,284 employee jobs (ie excluding self-employed) in the City Centre.
- The population of the Study Area comprises relatively high rates of young adults and elderly persons with a correspondingly lower proportion of working adults (aged 35-55).
- A high proportion of the population is in poor health – over a third classify themselves as suffering with a limiting long term illness. Dependency upon forms of benefit by these residents is therefore a key feature of this population.
- Within the Study Area there are high numbers of households without access to a car. Dependency upon local services and public transport is therefore necessary illustrating the need for quality City Centre services and jobs.
- Relatively high rates of households are described as separated, divorced and single. This may indicate a ‘transitional’ local population.
- The Study Area appears to have a somewhat polarised population – high proportions of the population are described as ‘social grading E’ (on state benefit, unemployed and lowest grade workers) however there are also higher than average rates of residents within ‘social grading AB’ (higher/ intermediate managerial / administrative / professional).
- CCS has a significantly higher proportion of ‘blue collar roots‘ residents (as categorised in the CACI lifestyle grouping) than GB with correspondingly lower levels of ‘flourishing families’ and ‘educated urbanites’.
- Residential vacancy rates are 10% - significantly higher than within CCS. Whilst second home ownership is not high (2.1%) it is higher than those both for CCS (1%) and South West Wales (1.6%), a significant area for holiday home investment.
- There are low levels of home ownership within the Study Area; the proportion of private rented stock is high (25% in comparison with CCS and SW Wales (approximately 10%).
- House prices within the Study Area are broadly in line with those in Swansea. As such the rate of increase over the last year is 13%, above figures for England and Wales (10%)
- Deprivation levels within the Study Area are high (based upon Castle ward indices)

- Despite the fact that Swansea's GVA (per head) relative to the UK has improved over the last 7 years, it remains below the UK average. In addition it is substantially below GVA for areas such as Cardiff and the Vale of Glamorgan and even Flintshire and Wrexham.
- Economic activity rates are low in comparison to those in CCS, TTWA and GB. In addition, self employment rates are low.
- Unemployment rates within the Study Area are considerably higher than those for the Urban Area and CCS despite the fact that these are already above the UK average.
- There are 1,442 businesses within Castle Ward (almost all of which will be found with the core City Centre) of which the largest proportion are within the service sector. Retailing is a key land use within the Study Area though there have been increases in the number of offices and food and drink establishments over recent years.
- The majority of businesses in the City Centre are small (employing between 1 and 10 employees), but there are 88 larger employers, employing 50 or over employees. These include several major retailers, but also a number of important public sector organisations.
- The majority of jobs are within the service sector and, as for Swansea as a whole, the public sector is a key employer (approximately 37% of the total workforce within Swansea as a whole).
- Whilst average earnings in CCS and TTWA are higher than those in South West Wales, they remain lower than the average in England and Wales. Only TTWA earnings are higher than those for Wales however, indicating a wealthier population within the wider TTWA than within Swansea itself.

Swansea City Centre 2003 : Vitality, Attractiveness and Viability

2.3 The 2003 "healthcheck", commissioned by the City Centre Partnership, provides a detailed and useful analysis of the current conditions within the City Centre. Key Findings[4] include:

- Size of the City Centre - the City Centre has a total area of 120.1 ha, of which the "central shopping area" concentrated around Oxford Street, the Quadrant and Parc Tawe comprises 62.4 ha. 2003 data reported in the healthcheck[5] shows 1,459,000 sq ft of retail goods and services floorspace in 441 units in the City Centre, of which 249,000 sq ft is convenience goods shops, 975,000 sq ft comparison, and 235,000 sq ft services (including restaurants, cafes, banks, building societies, etc.). There are a further 214 units comprising financial/professional services, business, industry, hotels, and other uses - a total of 655 units which represents 20% growth since 1991.
- Diversity of uses - retailing remains the dominant land use in the City Centre, though in terms of number of units its share has declined from 61% in 1991 to 50% in 2003. Floorspace comparisons suggest the balance of convenience and comparison goods is broadly in line with national trends, with some bias towards comparison goods. Growth has occurred in offices and food & drink establishments in the City Centre. Surveys indicate 17 residential units at groundfloor level and a further 86 at first floor level within the central shopping area.

[4] note that the healthcheck relates to a smaller area than the Study Area for the Strategic Framework study, particularly in excluding the "maritime quarter" which includes the marina and surrounding housing south of Oystermouth Road. Data will therefore be different from some of the data prepared for this study, but do provide a useful picture of the City Centre.
[5] updated figures in Section 8

- Vacancy - there were 75 vacant units in 2003, with a total floor area of 196,000 sq ft. This represents the highest level vacant floorspace amongst 13 comparator centres in the UK.
- Development - 2003 saw substantial investment and development activity in a wide range of schemes including Salubrious Place, Wind Street, Grand Hotel, National Waterfront Museum and SA1. "Focus" database showed an increase in the number of retailers seeking accommodation compared to 2002 and Swansea's position in the National Retail Demand Rankings rose from 107th to 59th place, indicating a growing level of interest in the City Centre. The report notes that 2003 saw dramatic growth in local house prices; and "the increasing potential for Swansea to emerge as a viable modern office market" - pointing to the Knight Frank South Wales M4 Cities Report 2003 which concluded that Swansea has a higher potential rental growth rate than both Cardiff and Newport. However, other developments are likely to have major impacts on the City Centre:
  - SA1 is seen as exerting a beneficial impact on the City Centre through important mixed use development including a commercial heart of Technium Phases 1 (20,000 sq ft, occupied), 2 (30,000 sq ft almost complete) and 3 (planned), as well as 1500 new dwellings, offices, B! uses, and ancillary leisure uses
  - Parc Fforestfach is a out-of-town retail scheme seen as likely to divert trade from the City Centre. It comprises 13 linked units with a gross area of 148,414 sq ft and includes Tesco "Extra", WH Smith, Marks & Spencer, Next and Argos, and opened in August 2002
  - White Rock Stadium - the Morfa Stadium has been funded by £55m of adjacent commercial development, including an 85,000 sq ft food superstore, 130,000 sq ft DIY/Garden Centre and 130,000 sq ft "retail terrace", with over 2,100 parking spaces

(The report notes that SA1 and White Rock Stadium need to be integrated with the City Centre through effective physical and transport links to help complement other planned developments in the City Centre and to help counter the attraction of the competing out-of-town facilities)

- Retail Rankings, Rents and Sales - Experian Goad indicates that Swansea is ranked 54th in its national hierarchy classification - a small improvement over previous years. Rental values in prime retail areas increased significantly 1997 - 2000, and have broadly stabilised since. A local sample of large multiple retailers indicated sales growth November 2002 - October 2003 of 5.73% (2.88% above inflation).
- Access and Parking issues - Swansea is easily accessible by both public and private transport, with 53% coming by car and 23% by bus. The City Centre is considered to be well-served by off-street parking with 7,047 spaces (compared, eg. to 6,520 in Cardiff). There are also 1,124 spaces at Park and Ride sites serving the Centre. However, a significant proportion of City Centre users are dissatisfied with the existing level and cost of parking. It is specifically noted in the report that a substantial amount of the City Centre's parking is at surface level, many of which are affected by development schemes. Alternatives will have to be provided to maintain the levels needed.
- Pedestrian flows have fallen in the City Centres over a long-run trend - but this is seen to mirror experience in other cities.
- Shopmobility - has seen strong growth in membership and equipment usage - Swansea's scheme is the busiest in Wales.
- Community Safety - there was a substantial increase of 29.3% in recorded crime within the City Centre Sector between April 2002 and March 2003, however there

this is attributed to new recording standards. More recent figures should give a clearer comparison.

- Air quality - improved and met national objectives in 2002
- Public Perceptions - a monthly City Centre User Survey confirms:
    - Primary importance of the City Centre's shopping role
    - Popularity of cultural and leisure facilities
    - Competition from neighbouring centres and out-of-town developments
    - Satisfaction with general cleanliness
    - Negative perceptions of availability and cost of parking
    - Need for improvements to aspects of public transport, particularly appearance of bus and train stations
    - Concerns regarding crime, disorder and safety in the City Centre
    - Need for continuous improvements to the public realm, particularly with regard to fly posting, graffiti and the condition of pavements

2.4 These last points provide an important insight into the problems of Swansea City Centre. When allied to other comments in the healthcheck- "the rapid growth in the development of edge and out-of-centre retail facilities, particularly within the Enterprise Park and more recently at Parc Fforestfach..have adversely impacted on investor confidence, store representation and trading levels within the City Centre" - the report highlights some key issues for the future.

2.5 The use of retail performance data and reference to "comparator centres" is a useful indicator of these issues. Experian Goad City Centre rankings - based on a range of indicators including the number of multiple retailers, comparison goods retailers and major multiples (including weighting to reflect key anchor retailers) - shows Swansea's national rank as 54 (2003).

The Swansea Economic Development Strategy (as reviewed at May 2005)

2.6 This strategy was prepared by Ecotec Consulting through a period of research between September 2003 and May 2004. The Strategy report identifies a number of key issues, including:

- strong employment growth (a 15% increase between 1995 and 2002), comparing well with GB, Wales and South West Wales. This included particularly strong growth in banking, finance and insurance; and public sector; but fall in manufacturing employment
- low value added economy. GVA per head is higher in Swansea than the rest of the region and Wales, but lags behind the UK average
- average unemployment levels but continuing problems of economic inactivity. Low economic activity rates may related to low average wages
- narrow economic base, sector dependency and vulnerability - employment in Swansea is dependent on a limited number of sectors - particularly public sector, banking, finance and tourism
- falling population and population balance change - population decline has occurred since 1992, and now has a falling population of working age
- below average business base - the stock of businesses per 100 population is lower than the national average, and there were 4% fewer businesses located in Swansea in 2002 than in 1995
- negative perceptions - Swansea is not rated highly in business location decisions because of negative perceptions about workforce size and state, premises, transport. Costs and state of the environment are seen as assets

- easing pressures on housing supply and availability - (though recent evidence suggest rapid rises in house prices in Swansea), the report notes lower house price growth
- pockets of deprivation - deprivation is concentrated in a few wards, but they are amongst the worst 20% in Wales

2.7 The Strategy report also noted 5 wider issues:

- perceptions that a poor built environment may be hindering growth and detracting from the attractiveness of the city to higher skilled workers
- good accessibility - transport links are seen as good
- retail centre - rental values are significantly below those found in main centres elsewhere in the UK and high comparative yields indicate a less attractive centre for investment.
- land - lack of utility infrastructure may be a major constraint on development in the city and there is a lack of quality sites
- changing profile of premises - there has been some growth in total commercial floorspace in recent years, but a greater proportion of retail space and a shift from factory floorspace to offices. There is a quality issue.
- relationship with Cardiff - the report notes that Swansea's relationship with Cardiff is a key issue

2.8 The Strategy then focusses on Key Strategic Choices, Themes and Priority Actions, with Key Priorities as :

- City Centre, especially relating to its role, appearance and accessibility
- image and perceptions among investors and visitors both of Swansea City Centre and the wider area
- need for a policy framework
- partnership working
- developing and retaining skills
- the need to change attitudes to be more constructive, pro-active and confident
- image building
- moving up the value chaing
- maintaining the gains
- transport

2.9 and key sectors are identified as:

- public sector
- R&D (Techniums)
- creative industries
- medicine
- tourism
- social economy

2.10 The first Theme of the Strategy - Strengthening Regional Capital Role refers to the need for short-term actions to :

- upgrade the retail offer

- developing the City Centre as a place to live for a balance of ages and social groups
- enhancing the public realm
- removing severance effects of Oystermouth Road
- establishing quality links to redeveloped docks areas

and medium/long term actions to:

- develop the City Centre as a place to live, especially for young professionals
- encourage quality office projects through developments such as Mansel Street, SA1 and Maritime Quarter
- establish quality links to redeveloped docks areas

2.11 Other Themes include "ImproveImage and Establish Swansea as a Quality Visitor Destination"; "Develop the Base of Economic Opportunities", "Strengthen Base of Quality Economic Opportunities", "Getting the Strategic Infrastructure Right" and "Ensuring all Sections of the Community can Participate and Benefit from Growth"

Swansea City Centre Action Plan 2005 - 2006

2.12 The Action Plan, produced by the City Centre Partnership and updated annually provides a clear Vision for the City Centre and a schedule of themes and proposed actions. (The Vision is set out in Section 2 of this report and represents a key focus for this study). We do not repeat all of the proposals in the Action Plan here, but not them carefully. The themes identified are:

- Reconnecting the City Centre
- Encouraging Mixed and Sustainable Development
- Developing a high quality and distinctive City Centre based on its location as a "Waterfront City"
- Developing partnership working

2.13 The City Centre Profile, Achievements to Date and review of Current Investment in the Action Plan present a strong picture of the assets and opportunities of the City Centre, and the 6 Priorities (with programmed Actions) demonstrate continuing progress:

- Priority 1 - Strategic and Co-ordinated Approach
- Priority 2 - Prosperous and Competitive City Centre
- Priority 3 - Improved Transport and Public Access
- Priority 4 - Safe and Secure Environment
- Priority 5 - Clean and Attractive City Centre
- Priority 6 - Marketing and Promotion

2.14 We aim to work closely with the Partnership to review this Vision, Themes and Priorities; and to develop the Action Plan into a full, robust and deliverable set of actions. We note the emphasis in the Action Plan on delivery, and the structures available to support this.

Communities First

2.15 It is important to note the connection between the City Centre and the Communities First designation for Castle Ward.

2.16 Communities First is a major flagship Welsh Assembly Government programme aimed at cutting poverty and helping to improve the lives of people who live in the poorest areas. It was launched on 31 March 2000 and was considered new and different in a number of ways:

- It is a long term programme and will run for at least ten years
- Local people themselves decide what is needed and are helped to make it happen

2.17 Communities First aims to:

- Get local people involved in improving their areas and their own prospects
- Bring in funding and support from a range of sources to make things happen
- Make sure improvements last
- Encourage flexibility, risk-taking and new ways of dealing with problems
- Involve everyone working together to identify and do something about their community's problems

2.18 There are 7 Communities First areas in Swansea, of which Castle Ward is one. Each Communities First area has a Co-ordinator and a Partnership Board made up of local people and paid workers from the private and public sectors whose role it is to agree Plans for each area.

2.19 The objectives of the local Plans will be to support actions which will help in:

- Building the confidence of local people
- Involving people in making their communities better places in which to live and work
- Encouraging education and skills training for work
- Creating jobs and increasing the income of local people
- Improving housing and the surrounding area
- Improving health and well being through an active and healthy lifestyle, and by tackling a range of issues that affect people's health
- Making communities safe places in which to live, work and play

2.20 Clearly these objectives are relevant to the development of proposals for the City Centre. We will discuss the detail of the plans for Castle Ward in the next stage of work of the study.

3 POLICY CONTEXT (AS DRAFTED IN MAY 2005)

3.1 A range of policies, strategies and plans give the background policy context for the Strategic Framework for Swansea City Centre. These are reviewed below at national, regional and local levels.

National Strategies and Plans

People, Places, Futures – The Wales Spatial Plan

3.2 Published in November 2004, this first spatial plan for Wales reflects the Welsh Assembly Government's desire to prepare for the future based on the key principles of social justice, equality and sustainability. WAG sees spatial planning as an important tool and activity for reconciling different policy and activity strands which impact on the various geographic areas – and the Wales Spatial Plan is one of the first to be developed in the British Isles.

3.3 The Plan has a vision based on building sustainable communities, promoting a sustainable economy, valuing the environment, achieving sustainable accessibility and respecting distinctiveness. It recognises the need for each area of Wales to have its own distinctive response to delivering the national vision.

3.4 For Swansea Bay – Waterfront & Western Valleys the vision is for 'An area of planned sustainable growth and environmental improvement, realising its potential, supported by integrated transport within the area and externally, and spreading prosperity to support the revitalisation of West Wales'.

3.5 The area is described as having the population and facilities that will allow it to help shape Wales' future. There are many signs that Swansea is on the cusp of substantial and sustained improvement although at present the area as a whole is not benefiting from its potential. The main elements of the strategy for the area are:

- Development of a modern, attractive and vibrant waterfront urban area
- Revitalisation of Swansea as Wales' second national city
- Enhanced transport links between inland communities and the coast

3.6 The Spatial Plan wants the role of Swansea as the second city to be strengthened as a driver for growth within the area and a catalyst for development further west. Appropriate cultural, leisure, and social infrastructure and regional capital functions, including retailing should be encouraged to provide an attractive place to live, work and visit. This will help to retain young people and attract well-qualified people from outside the area providing a stimulus for improved economic performance. The Plan recognises that the natural assets of Swansea will need to be capitalised upon, including improving the linkages between the city centre and seafront area, building upon SA1 waterfront and Swansea Marina developments

Wales: A Better Country

3.7 The Strategic Agenda of the Welsh Assembly Government was published in September 2003. It describes Wales as starting the 21st century with new potential as well as some old challenges – in particular the need to help more people into work, create better jobs and skills, improve health, and build strong and safer communities.

3.8 A revitalised and regenerated Swansea City Centre will have a part to play in overcoming each of the challenges identified

- Helping more people into work. The strategy describes the Welsh work force as showing a high level of flexibility in adapting to profound changes in the industrial structure. However there is a continuing challenge of raising the level of economic activity, particularly amongst those of working age in deprived urban communities and among people with low levels of educational and vocational attainment.

Working towards removing those barriers to economic participation is a focus for Swansea Council. A regenerated City Centre would contribute to reducing deprivation, while attracting a spread of diverse new jobs (to suit a variety of people) into Swansea would help on the demand side of the issue

- Creating better jobs and skills. The strategy recognised that raising educational attainment, skills and innovation is critical if Wales is to compete on adding value in a European and global economy. While Wales has some successful modern industries and highly competitive companies in all sectors, there are not enough companies with head offices, and research and development functions in Wales. This tends to hold back the relative GDP in Wales, both directly through the lack of these higher paid jobs, and indirectly through less need for the professional services such as banking, law and accounting, which are required by head offices, and fewer of the 'spin off' new companies that are spawned by large company research and development functions. With Swansea City Centre fulfilling its potential as a 'core city' for Wales, it would help to attract new head offices, or European regional offices, and research and development functions to the Swansea area.
- Improve health. The recent Wanless report underlined that improving levels of health means not just better services to treat ill-health, but a much greater emphasis on primary care and the promotion of healthy life-styles to prevent ill-health arising. Providing opportunities for sport and active recreation in the City Centre (such as the refurbishment of the Leisure Centre) and ensuring that people can reach those facilities, would benefit not only the increasing number of people living in the centre, but those who live within the local area
- Build strong and safer communities. Wales has a tradition of strong community identity and self-help which provides a good basis for enabling communities to identify their own needs and future direction and address problems of day to day concern such as crime, drug-abuse, and the quality of the local environment. It will be important that the citizens of Swansea are consulted on the proposed City Centre strategic framework to ensure that the strong community identity is preserved and enhanced. In addition, the public realm in the city centre must be of the highest quality to ensure pride in the local environment.

A Winning Wales

3.9 The National Economic Development Strategy of the Welsh Assembly Government, first published in January 2002, aims to set out a clear vision, and provide a route map to delivering a prosperous Welsh economy that is dynamic, inclusive and sustainable, and is based on successful, innovative businesses supported by a highly skilled, well motivated workforce.

3.10 Within the objectives and priorities of the Strategy are two areas where the regeneration and revitalization of Swansea City Centre can make a particular contribution:

- Establishing Wales in the World – by helping to attract high value sustainable investment to Wales as well as helping to attract more national and international events. As Swansea works towards becoming a 'world-class' location it will help to attract new businesses from, and exporting to, the rest of the world. A world-class trading environment that international companies are comfortable with, and an unequivocally warm welcome to people willing to come to Swansea to study and to work, bringing their skills, commitment and capital, are essential to Swansea's economic future
- Creating Strong Communities – by encouraging community regeneration. The aim of the Welsh Assembly Government is to help to create communities that are safe and a pleasure to live in, and where everyone is actively involved in creating the community they want. Thriving communities provide the foundation on which

people can grow and successful businesses can flourish. The Strategy recognizes the economic and social benefits gained from investing in areas of community infrastructure, such as housing

Creative Future

3.11 The Culture Strategy for Wales, a ten year plan to put cultural issues higher up the agenda in Wales, was launched in January 2002. It describes culture not as a luxury or embellishment to daily lives, but as the 'texture of living' which the Welsh Assembly Government wishes to enrich and in doing so release the energies, talents and creative potential of individuals. It recognises the image of Wales beyond its borders is largely based on cultural factors such as landscape, language, music, poetry and sport; it sees culture as having both an intrinsic value and economic benefits. Culture can also act as a cross cutting theme, for example as a bridge to social inclusion, equal opportunities, and sustainable development.

3.12 The strategy has eight main themes to guide the work of cultural bodies. The key priorities are young people, communities, cultural diversity, the creative industries, emphasis on evidence based policy making, sport, international profile, and development of professional arts and artists.

3.13 Swansea City Centre could play an essential role as the centre of culture for South West Wales. Creative Future highlights areas of deficiency – where Swansea may have an essential role to play. These range from providing modern venues appropriate to local needs and national ambitions, to investing in festivals and attracting sporting events, conferences and exhibitions.

Regional Strategies and Plans

3.14 Swansea lies within the South West Wales administrative region of Wales. Strategies and plans relating to South West Wales, and how they impact on Swansea City Centre and its future development are described below.

Regional Planning Guidance – South West Wales

3.15 Regional Planning Policy Guidance (RPPG) for South West Wales was published in April 2000, preceding the Wales Spatial Plan. The document sets out guidance in the form of a suite of agreed strategic planning policy principles and guidelines, to provide a regional framework for the preparation of Unitary Development Plans (UDPs) in South West Wales.

3.16 An overarching principle of the RPPG is that of sustainable development which must be central to all areas of policy making. The following aspects of sustainable development listed in RPPG are relevant to the City Centre:

- Location of the majority of new development in existing centres
- Full and effective use of land within existing centres, maximisng the use of brownfield sites
- Integration of transport and land use planning
- Reduction in the need to travel, especially by private car, and maximising accessibility by a choice of transport means
- Environmental protection and enhancement
- Management of resource demand – minimising consumption and increasing efficiency

3.17 Within the RPPG, Swansea City Centre is described as South West Wales' regional centre and main focus for retailing, commercial, leisure and cultural activities.

3.18 Specific regional planning policy guidelines relevant to Swansea City Centre are reflected in the City and County of Swansea Unitary Development Plan and described in more detail in paragraph 3.21 onwards, below.

Swansea Bay Arc of Opportunity

3.19 The Swansea Bay Arc of Opportunity is a concept which straddles local authority boundaries and extends around the shore of Swansea Bay and along the M4 Corridor. It aims to regenerate the areas and communities as a growth point, which will act as a stimulus to the whole of South West Wales. This will focus on the creation of a thriving, high quality sub region with an emphasis both on raising the quality of life throughout the area and on bringing forward key regeneration sites.

3.20 The Arc will both be served by, and strengthen Swansea City Centre which will also be more closely integrated with the waterfront. The Swansea Waterfront proposals are essential to the effective delivery of this sub regional concept. It is a unique opportunity that is proposed to integrate the City Centre with the Maritime Quarter and Port Tawe via a 'destination area' based on the National Waterfront Museum fulcrum.

Local Strategies and Plans

City and County of Swansea - Unitary Development Plan

3.21 The Unitary Development Plan (UDP) (Consultation Draft, February 2003) seeks to capitalise on the economic and tourism potential of Swansea's waterfront location, in particular through the integration of the City Centre with the Maritime Quarter and Port Tawe to create a modern core for the City. Priority is also being given to the restoration and revitalisation of the City Centre to maintain and enhance its regional role.

3.22 A core element of the UDP's spatial strategy involves capitalising on the development opportunities presented by the City Centre and the urban waterfront areas. It is proposed that the City Centre be restored and revitalised as a dynamic and vibrant mixed-use focus for the region. Encouragement will be given to the location there of new shopping, leisure, cultural and business activities and to the maximisation of new housing provision.

3.23 The UDP aims to ensure the City Centre is well integrated with the exceptional waterfront development opportunities provided by the [then] remaining undeveloped sites in the Maritime Quarter, the Port Tawe development area and the southern section of the River Tawe corridor. The UDP expects the successful integration of these elements to allow the creation of a high density, mixed use, modern core for the city and to be the key to taking Swansea into the next era of its development and to successfully creating a new positive image for the area.

3.24 Specific policies which impact on the City Centre include:

- Policy SP2: Creating a healthy, attractive and ecologically rich environment. Including action to:
  - radically improve the townscape quality of the City Centre, so as to foster a distinct sense of place and to integrate the centre and waterfront
  - capitalize on the opportunity to establish a strong identity as a Waterfront City, through a combination of development proposals, enhancement and conservation measures
- Policy SP3: Providing homes and community facilities. Including:
  - Housing: placing a priority on the City Centre/Inner City and waterfront area
  - Shopping: sustaining the vitality and viability of existing centres, particularly the city centre, through controlling the direction of retail growth. The City Centre will be strengthened and improved as the primary regional shopping destination

    - Leisure and tourism: providing for increased demands for leisure activities arising from increasing leisure time and prosperity. The plan recognises that improved leisure facilities will be of benefit to an enhanced tourism portfolio – and tourism will play an increasing role in the local economy. Provision is made for establishing and improving a network of key urban leisure and tourism destinations, including the City Centre and the Maritime Quarter, and establishing a regional focus for sport and leisure clustered around a new Morfa Stadium.
- Policy SP5: Improving accessibility. The strategic proposal places increasing importance on the role of public transport as an alternative to the private car. The following actions are relevant to the City Centre:
    - Reducing traffic impact within the City Centre and waterfront area
    - Retaining and enhancing the Quadrant Bus Station as a focus for bus passenger movement
    - Enhancing the interchange facilities at High Street Station
    - Producing a package of measures to improve the parking portfolio serving the City Centre

Ambition is Critical – Making a Better Swansea

3.25 This Community Plan has been developed by the Better Swansea Partnership (consisting of Swansea's key agencies including the local authority, the police, the local health board and NHS Trust, higher and further education establishments, large local employers, Job Centre Plus and other local agencies as well as the West Wales CBI and the WDA).

3.26 The Partnership's Community Strategy was published in 2004. Its Vision for a Better Swansea includes the following elements all relevant to the City Centre:

- By 2020 Swansea will be a distinctive European City
- A city that compares with the best
- A city that invests in the future
- A city where everyone matters
- A city that values its culture and heritage.

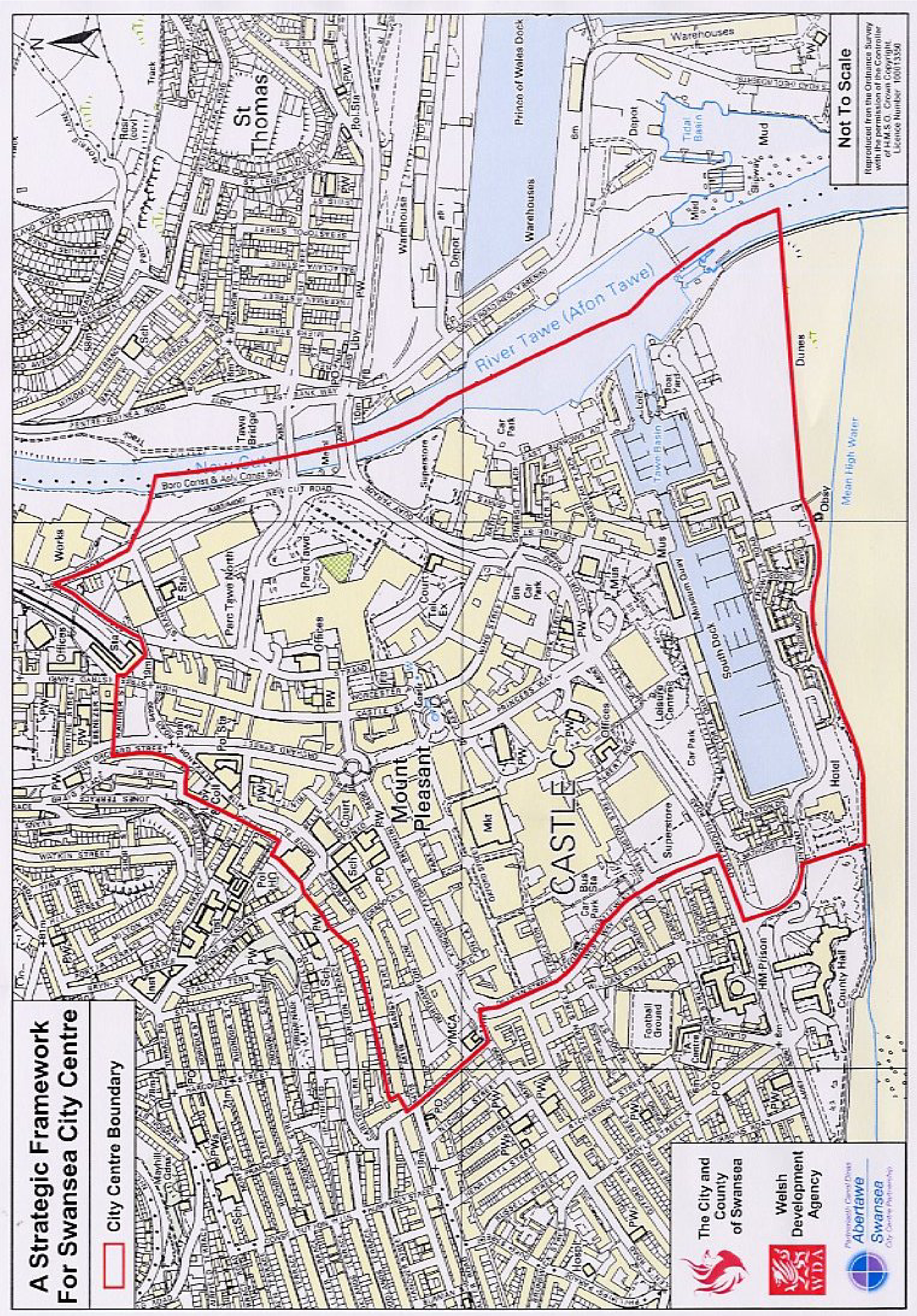
3.27 The Swansea Voice is a 'citizens' panel of 1250 local people consulted on their ambitions for Swansea. These are all relevant to the success of the City Centre:

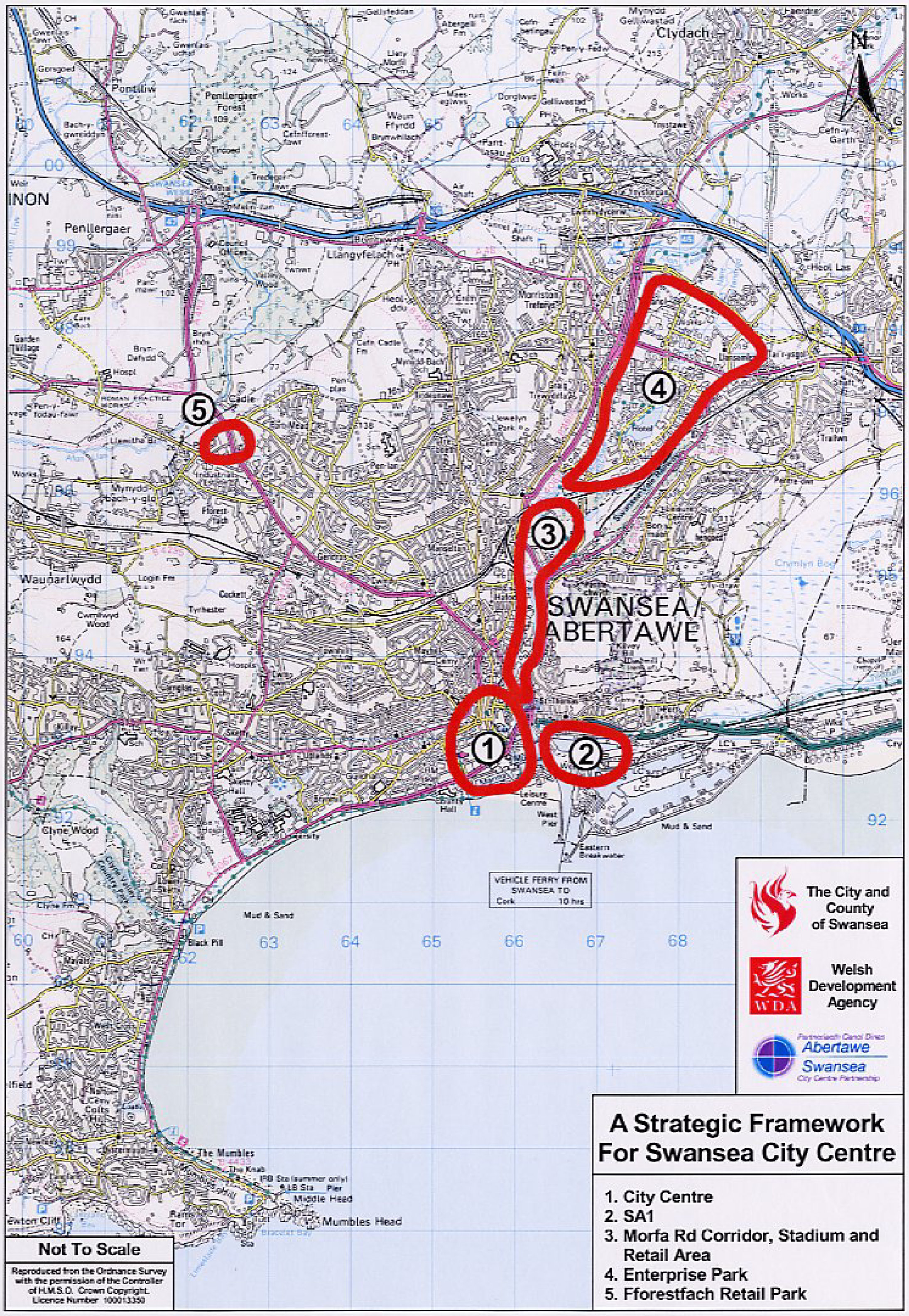
- Tackling violent crime
- Promoting growth of the local economy
- Improving roads and transport
- Improving opportunities for young people
- Improving the image of the area to attract more investment and visitors
- Timely and equal access to quality health and social services

ANNEX ONE

Study Area and Context Maps

Study Area


A Strategic Framework
For Swansea City Centre
City Centre Boundary
Not To Scale
River Tawe (Afon Tawe)
Prince of Wales Dock
St Thomas
Mount Pleasant
CASTLE
South Dock
Tawe Basin
Tidal Basin
Warehouses
Dunes
Mean High Water
HM Prison
County Hall
Football Ground
Superstore
Leisure Centre
Parc Tawe North
The City and County of Swansea
Welsh Development Agency
Abertawe
Swansea


A Strategic Framework For Swansea City Centre
1. City Centre
2. SA1
3. Morfa Rd Corridor, Stadium and Retail Area
4. Enterprise Park
5. Fforestfach Retail Park
The City and County of Swansea
Welsh Development Agency
Abertawe
Swansea
Not To Scale
Reproduced fron the Ordnance Survey with the permission of the Controller of H.M.S.O. Crown Copyright. Licence Number 100013350
SWANSEA/
ABERTAWE
VEHICLE FERRY FROM SWANSEA TO Cork 10 hrs
Clydach
Penllergaer
Llangyfelach
Waunarlwydd
Mumbles Head
The Mumbles
Mud & Sand

3.28

ANNEX TWO

Socio-Economic Data

Socio-Economic Data

This Annex contains data to describe the characteristics of the Swansea City Centre Study Area[6] (hereafter known as the Study Area). Where useful, comparisons will be drawn with the characteristics of several comparator areas – Swansea Urban Area[7], the City and County of Swansea area (CCS), South West Wales[8], Wales and England and Wales.

The baseline describes the Study Area using sets of statistics based around data collated at both Output Area and ward level geography. Electoral wards are the key building block of UK administrative geography and can be used to drawn down data for a range of social and economic indicators. Output Areas are defined by ONS and are geographically smaller than wards. As Census data is collated at Output Area level it is possible to draw together Census data for geographical areas such as the Study Area.

The profile draws from a number of primary and secondary sources of data and information. Sources are referenced throughout the text.

Demographics

The Study Area lies at the centre of Swansea (Wales' second largest City) on the South West Wales Coast and on the west coast of the River Tawe. The heart of the City Centre is sited within the Study Area and as such many of the City's shopping, leisure, cultural, educational and administrative functions are encompassed. An estimated 1.5 million people live within one hour's drive of the City Centre and some 3.6 million within 2 hours.

Population

There are 5,694 residents within the Study Area, almost 6% of the Swansea Urban Area (96,132 residents) and 2.6% of the Swansea UA (221,823 residents). The Travel to Work Area's population is over 25% larger than CCS's (272,162 residents). The population of South West Wales is 639,046 (Swansea Urban Area incorporates approximately 35% of the total for South West Wales).

The population of the Study Area is weighted towards the young and the elderly with much lower proportions of those aged between 35 and 55 than in comparison areas. Over 35% of the population is aged between 15 and 35 as compared to 27% in the Urban Area and 25% in CCS. There are however significantly fewer residents aged under 14, less than 9% as compared to around 18% for all other comparison areas therefore indicating that whilst the structure of the study area is generally young, there are far fewer families resident within the area.

The proportion of those aged over 65 is higher than for the Urban Area or UA. Over 21% of the Study Area is 65+ as compared to 18% in the Urban Area and UA. In

[6] Swansea City Centre Study Area was defined in the brief for the Strategic Framework. In order to obtain statistical data for the area it was necessary to define which 'Output Areas' lie within the boundaries of the Study Area. Output areas are small geographical areas defined by ONS for which Census data is collated. The Study Area comprises the following Output areas: *list to be confirmed*

[7] Swansea Urban Area is the area of continuous built-up development, so covers the area which many people would identify as "the city", but excludes smaller settlements and areas which are seperated from the city by open land. It is defined by ONS as comprising the following wards: Bonymaen, Castle, Cockett, Cwmbwrla, Dunvant, Fairwood, Gowerton, Killay North, Killay South, Landore, Llangyfelach, Llansamlet, Mayals, Morriston, Mynddbach, Newton, O, West Cross, St Thomas, Sketty, Townhill and Uplands, Oystermouth and Penderry.

[8] South West Wales comprises Pembrokeshire, Carmarthenshire and Swansea UA.

Swansea as a whole over a third of the population is now over 50, a 5% increase over the last 10 years and research indicates that over the next 15 to 20 years the number of people aged over 85 in Swansea will increase by a third. (Ambition is Critical, Better Swansea Partnership, 2004)

Population change – awaiting figures

Over 92% of Study Area residents describe themselves as white; Bangladeshi residents are the most prominent other ethnic group (3.5%). In comparison with other comparator areas however the Study Area has proportionately high rates of ethnicity.

The health of Study Area residents is fairly poor – only 57% describe themselves as being in good health. A further 25% are described as being in fairly good health with almost 20% being of poor health. Almost 31% classify themselves as suffering from a limiting long term illness.

These health statistics stand out in comparison with those in CCS and South West Wales. Even those in the Urban Area are much improved upon those within the Study Area (63% of residents describe themselves as in good health and only 26% suffer from a limiting long term illness). In comparison with the rest of Wales, Swansea also has a higher proportion of children receiving free school meals and of smoking teenagers.

As is common within City Centre populations, there are much higher levels of households without a car. Within the Urban Area 36% of households have no access to a car – in CCS this decreases to 28.5%. In the Study Area however 51% of households do not own a car.

As highlighted potentially within the population statistics, there are high levels of single (never married) residents within the Study Area (52% as compared to 46% in the Urban Area and 43% in CCS). Households described as separated, divorced or widowed are also proportionately high within the Study Area (25% as compared to approximately 17% in the Urban Area and UA).

A high proportion of Study Area residents describe themselves as social grading E (on state benefit, unemployed & lowest grade workers – 11.9% as compared to 10.2% in the Urban Area and 8.2% within CCS). There are however relatively high proportions of residents within AB social grading (higher and intermediate managerial/ administrative/ professional – 51.5% in contrast to 47% in the Urban Area and 51% in CCS). Lower proportions of skilled manual workers reside within the Study Area.

Census data is used by CACI to determine lifestyle groups. Whilst this data has not been made available at Study Area level, it is possible to review the characteristics of Swansea Urban Area in this manner. The most notable difference between Swansea and GB groupings is the proportion of the population identified as 'blue collar roots' (17.22% as compared to 8% in GB). Other key differences are in the reduced proportion of 'educated urbanites' (0.59% as compared to 4.6% nationally) and 'flourishing families' (6.55% as compared to 8.8%). Interestingly however the proportion of the population classified as 'inner city adversity' is lower than in GB (0% in contrast to 2.1% in GB).

Dwellings

There are 3,607 household spaces within the Study Area, 8.2% of the Urban Area and 3.7% of CCS. Of these, 357 are vacant (10% as compared to 5.6% in the urban Area and 4% in CCS) and 76 are second residences/holiday accommodation (2.1% as compare to less than 1% in CCS and 1.6% in South West Wales). It is likely that many of these second residences are located within the maritime quarter of the Study Area.

Housing stock within the Study Area comprises primarily of terraced properties and flats/apartments. Whilst the stock within comparison areas shows increased levels of other stock (semi detached, detached etc) the Study Area housing is of a type generally expected within City Centre areas.

Levels of home ownership within the Study Area are low in comparison to all comparator areas. Only 38% of households within the Study Area own their own home, contrasting to 61% in the Urban Area, 70% in CCS and 71% in South West Wales. The proportion of households in social rented stock is high (34% as compared to 26% in the Urban Area and 19% in CCS) however of these households, only 33% rent from the Council. In comparator areas over 75% of households in social rented accommodation rent from the Council. Levels of private rented stock is high – almost 25% as compared to 10.5% in the Urban Area and less than 10% in CCS and South West Wales.

Average house prices within Swansea are lower than the averages for Wales and England and Wales (£129,129 as compared to £133,630 in Wales and £183,317 in England and Wales, Land Registry, May 2005). Prices have also decreased in the last quarter (-2.1% in Swansea and -3.7% in Wales) whilst in England and Wales they have merely stabilised (0% increase). Over the last year however prices have increased by 13% in Swansea and 14% in Wales compared to 10% in England and Wales.

Within the Study Area (postcode SA1 3) average house prices are £128,403 (March 2005) a 16.3% increase since March 2004. This is based upon property sales in this area which, in line with the Census data described previously, consisted of terraced dwellings and flats. A large proportion of housing stock is also sited in the maritime area of the City (SA1 1) however data for sales within this area was not available from the Land Registry (no sales listed).

Deprivation

An update of the Welsh Index of Multiple Deprivation (WIMD) is not available until later in 2005. As such the 2000 Indices remain the most current deprivation indices. Within Swansea there was a wide range of deprivation indices across the 42 electoral divisions with just under a third falling within the 40% most deprived in Wales. Levels of deprivation within the City were slightly higher than in Wales as a whole in terms of health, income and employment.

Townhill is the most deprived electoral division within Swansea, ranked 7 out of 865 in Wales. Townhill is located to the north east of the City Centre (Castle electoral division). Castle electoral division (the best fit data for the Study Area) was ranked 99 out of 865 in Wales and was the 4th worst ranked electoral division within Swansea, scoring particularly poorly in respect of income and employment.

Economic Activity

Gross Value Added (GVA) measures the contribution to the economy of each individual producer, industry or sector in the UK and is used in the estimation of GDP. Sub-regional estimates of GVA are available from ONS at the NUTS3 area.

For Swansea UA (equivalent to the NUTS3 area) GVA per head stood at £12,610, slightly above the all-Wales level (£11,971) but well below the UK average of £15,614. Swansea's GVA per head figure is the highest of the 8 NUTS3 areas in West Wales and the Valleys (Objective 1) area but is well below areas in South/East Wales for example Cardiff and the Vale of Glamorgan (£17,484), Monmouthshire and Newport (£14,890) and Flintshire and Wrexham (£14,654).

Trends indicate that Swansea's position relative to the UK has however improved over the last 7 years. In 1995 the Swansea per head figure was 80% of the UK base: by 2002 this had increased slightly to 82% whilst the Wales UK figure fell from 82 to 77% over this period.

There are 3,797 residents aged between 16 and retirement age within the Study Area. Of these, 2,271 are economically active (60% as compared to 65% in the Urban Area and 69% in the Travel to Work Area and UA). Self employment rates are on par with those in the Urban Area (8%) and UA (9.4%) though low compared to those in South West Wales (12.8%). (Census 2001)

More recent economic activity data (2003) is available from the Labour Force survey however this is available only at UA level. This indicates that the economic activity rate (for the working age population) is 75.4% for Swansea as compared to 74.2% in Wales and 78.2% in GB. Self employment rates within Swansea (2003) are 8.9%, lower than GB's 12.6%.

In terms of business stocks and registrations, the picture in Swansea UA is of a relatively static stock (roughly equal numbers of registrations and de-registrations) with stock levels now at 4,370 (businesses with an annual turnover above £56,000). The picture in Wales and the UK also remained relatively stable with net annual decreases in stocks of less than 1% in both cases. (Swansea CC, 2005).

When relating these stock figures to population figures (in order to enable comparisons of business activity between local and national areas) Swansea's stock rate of 240 (VAT companies per 10,000 adults) remains lower than that for Wales (327) and UK (371) (Swansea CC, 2005). During 2002 there were 23.6 registrations for every 10,000 residents aged 16+ in Swansea, notably lower than the rates for Wales (26.1) and the UK (37). Notably however, de-registration in Swansea (25.3 per 10,000 adults) was also lower than national equivalent figures (29 and 37.1 respectively).

The 2001 Census showed high unemployment levels – 10.7% (7.7% in the urban Area and 6.3% in CCS) and also high numbers of students (271 describing themselves as economic active and 582 as economically inactive) in comparison with other areas.(Census 2001). By comparison, current data shows that unemployment rates have fallen and within the Urban Area and CCS are now approximately 2.5% (March 2005). Castle ward however suffers from much higher unemployment rates than comparison areas and whilst now lower than July 2004, rates are still 5.3%. (Nomis, 2003)

Within the Study Area, 1,929 residents are in employment. The most common employment sectors for these residents are wholesale and retail trade and repairs (16.6%), hotels and restaurants (12.9%), health and social work (12.2%) and real estate, renting and business activities (11.9%). Within the urban Area and UA there are much higher proportions of residents involved in manufacturing, wholesale and retail trade and education and social work. (Census 2001)

As indicated through the social grading (see demographical statistics earlier) the Study Area accounts for relatively high proportions of residents working within managerial and professional occupations (42.2% as compared to 33.9% in the Urban Area and 37% in CCS). Proportions of residents involved in skilled trade and personal service occupations are lower than in comparison areas although residents employed within elementary occupations is again high (15% in contrast to 14% in the Urban Area and 12.9% in CCS). (Census 2001)

Businesses and Employment

Information on businesses and employment is drawn down from the Annual Business Inquiry. This information is not available at Output Area level and it is not therefore possible to determine data at the Study Area level. All of the Study Area falls within Castle ward however and therefore data from this ward can be used as the 'best fit' for the Study Area.

It should be noted that the Annual Business Inquiry relates to employees and organizations (public and private sector) and does not include self-employment.

There are 1,442 businesses within the Castle ward of which 43.6% are within the distribution, hotels and catering sector and 29.7% within the banking, finance and insurance sector. In comparison with the Urban Area these are much higher levels within these sectors and slightly lower levels within public administration, education and health and manufacturing sectors. It is however to be largely expected given Castle ward's location within the City Centre and therefore central for many services. (Nomis, 2003)

Retailing is in fact the dominant land use within the City Centre although over recent years the number of units has decreased (61% in 1991 to 49% in 2004) (City Health Check, 2004). One reason for this decrease may be the significant growth of Business offices and food and drink establishments and more recently, the emergence of residential accommodation within the City Centre.

Over 80% of businesses within Castle ward are categorised as small businesses (employing between 1 and 10 employees). This is actually in line with the number of small businesses within both the Urban Area, UA and South West Wales as a whole. There are however a significant number of large businesses within the ward – 66 employ between 50 and 199 employees and 22 employ over 200 employees (see next paragraph. (Nomis , 2003)

Within Swansea as a whole the public sector is a key economic driver employing over 35,000 people (approximately 37% of the total workforce). (Ambition is Critical, Better Swansea Partnership, 2004). Major public sector employers include HM Land Registry, DVLA, Swansea University, Swansea Institute and The City and County of Swansea. Other key employers include 3M, Alberto Culver, Crown House Engineering, INCO Europe Ltd (all manufacturing), Asda, Boots, Debenhams (retail), Admiral Insurance and Cefn Coed Hospital. (Focus, 2004)

There are 24,284 jobs within the ward – with the majority of employees working within the distribution, hotels and catering sector (36.3%). Large proportions of jobs also exist within the banking, finance and insurance sector and, despite the low number of public administration, health and education businesses, over 27% of jobs are also within this sector. (Nomis , 2003)

The public administration sector is a large employer right across all comparison areas (36.8% in CCS and 37.4% in the Urban Area). In addition the distribution, hotels and catering sector employs large numbers - 24.6% in the Urban Area and 25% in CCS, though not as high as in Castle ward. The main difference between Castle ward and the comparison areas is the proportion of people employed within the manufacturing sector. In CCS 9.5% are employed within the manufacturing sector, in the TTWA this increases to 10.2% and in South West Wales it is 13.5%. In contrast only 2.8% of employees within the Castle ward work within the manufacturing sector. (Nomis , 2003)

Job vacancies within Castle ward mirror the main employment sectors namely banking, finance and insurance (30.9% of vacancies), distribution, hotels and catering (25.6%) and public administration, education and health (23.5% of vacancies). (Nomis, 2003)

It is not possible to ascertain earnings information for the Castle ward (NES, 2003) however data is available for both residence and workplace earnings at UA and TTWA level. For both areas, residence based earnings were higher than workplace earnings indicating that those living within these areas earn slightly more than those working in the areas.

Overall earnings (gross weekly pay) within both Swansea UA and TTWA are higher than those for South West Wales but lower than for England and Wales. The TTWA in particular has higher earnings (£356) than both CCS (£339) and Wales (£348) though lower than for England and Wales (£400). As such, the current Swansea UA earnings are 3% lower than the average in Wales and 15% lower than those in England and Wales.

Perceptions

Economic

The UK City Competitiveness Index 2002 presents a series of performance indices calculated for selected cities whereby all indices are linked to a UK base of 100. A snapshot of Swansea's ranking is illustrated below:

City	Competitiveness Index	Productivity Index	Knowledge Index
Swansea	90.43	91.8	73.28
Cardiff	100.47	97.5	104.32
City of London	271.95	127.8	317.83

Retail

Various ranking systems enable the performance of Swansea City Centre to be gauged in relation to surrounding and comparator centres. The Experien ranking system indicates that Swansea's position in the retail ranking improved between 2003 and 2004. Given that Swansea's offer was not much improved over the year, it can be assumed that the City's ranking increased only as a result of deterioration in other centres.

Management Horizons Retail Ranking is based on the representation of retailers within the Centre. To this end rankings indicate that Swansea's place has decreased substantially (by 17 places) over the last 5 years and now is placed 70th nationally. Cardiff is ranked 12th.

CACI rankings are also derived from counts of multiple retailers but additionally take into account expenditure information. This system classifies Swansea as a Major Regional Centre though its position in the rankings is 69 having fallen from 32 in 2003. This is however partly the result of changes to the scoring system and is in common with decreases in the ranking of many other Major Regional Centres.

Swansea City Centre: Strategic Framework

Technical Appendix 1:
STRATEGIC AND SOCIO-ECONOMIC ISSUES

1.2 Economic Forecasts (July 2005)

ROGER TYM & PARTNERS
Planners and Development Economists

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CONTENTS

1 INTRODUCTION

1.1 This report looks at employment sectors in Swansea and its city centre. We consider:

- Past change
- Current strengths
- Future growth

1.2 Chapter 2 begins with an analysis of past change in employment in Swansea to see in which industries Swansea has grown since 1998. We also consider in which geographical areas – including the city centre – this growth has occurred as well as where floorspace is concentrated in the different sectors.

1.3 In Chapter 3 we analyse Swansea's current industrial strengths at a detailed breakdown level of industrial sectors i.e. in which sectors Swansea is over-represented compared to the national 'norm'.

1.4 Chapter 4 we summarise the forecasts for Swansea Unitary Authority. We then cross-refer the forecasts against the current sectoral representation within the economy compared to the national norm. Each point on the chart reflects the size of the sector within the economy. The chart therefore indicates future growing sectors and their current importance to the economy, as well declining sectors and their current importance.

1.5 In Chapter 5, we analyse the jobs forecasts in more detail. Some of these sectors are already important to Swansea in terms of their employment numbers and some generally are located in city centres.

1.6 In Chapter 6 we investigate the propensity for firms in some of these sectors to located in city centres, and we analyse the potential for growth of these sectors in Swansea city centre.

2 PAST CHANGE IN EMPLOYMENT

Change by Industrial Sector

2.1 In Swansea Unitary Authority, the major employment changes between 1995 and 2003 occurred in public sector activities, retail, construction and some business sectors.

2.2 As in the rest of the country, most of the losses occurred in manufacturing sectors. As well as the large losses indicated in the table, many small manufacturing sectors experienced minor declines, which individually are insignificant, but together sum to a large number of jobs.

Change by Geographical Area

2.3 Since 1995, net new employment in Swansea Unitary Authority has not generally been focused in the city centre (defined here as Castle ward). Following policy, most employment growth has been focused outside of the city centre, in enterprise zones and new business parks.

2.4 **Error! Reference source not found.** below shows wards in which the major changes occurred. Llansamlet, Morriston, Mynyddbach and Penllaergaer all contain enterprise zones or business parks where employment has located in more recent years.

Table 2.1 Employment growth by ward

	Castle (proxy City Centre)	Cockett	Llansamlet	Morriston	Mynyddbach	Penllaergaer	Sketty	Swansea UA
Total jobs	500	-400	3,900	2,800	1,800	1,400	1,300	13,000
	2%	-6%	45%	58%	54%	101%	16%	16%
Mfg	500	-1,400	-100	-	-100	100	-	-2,400
	73%	-46%	-5%	-	-88%	12%	-	-24%
FBS	1,300	700	2,000	200	-	-	400	4,900
	30%	226%	79%	30%	-	-	70%	45%
Public Admin	-200	-300	300	-400	1,300	300	-	1,200
	-6%	-100%	560%	-57%	51%	∞	-	14%
Education	-500	100	300	500	300	200	500	3,300
	-34%	44%	225%	125%	133%	913%	19%	44%
Health	-300	200	100	2,800	100	200	100	3,100
	-16%	40%	23%	257%	117%	8650%	3%	28%

Source: Annual Business Inquiry, 2002, Annual Employment Survey Rescaled 1995

Note: Wards are based on 1991 frozen wards to allow for comparison over time.

Note 2: We cannot use data for 2003 because comparative geographical ward data is only available for 1991-defined wards up to 2002.

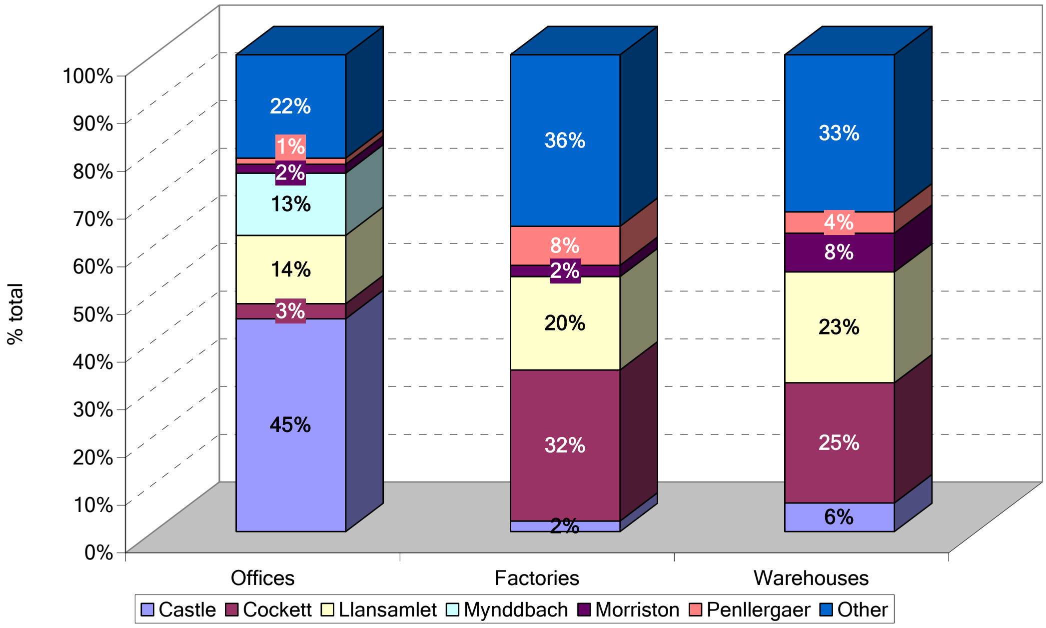
Note 3: There was a net increase of over 6,400 jobs in Swansea between 2002 and 2003, which accounts for differences between the totals in Table 2.2 and Table 2.1.

2.5 The city centre experienced increases in financial and business services between 1995 and 2002, but declines in most other sectors. The net total jobs increase summed to 500 – just 2%. This compares to much larger growth in Llansamlet, Morriston, Mynyddbach, Penllaergaer and Sketty – over 11,000 jobs in total in those five wards.

Floorspace Statistics

2.6 Figure 2.1 below shows floorspace breakdown by ward, showing only the wards that have a significant amount of floorspace in at least one sector. The city centre currently has the lion's share of office floorspace, with 45% of the 383,000 square metres.

Figure 2.1 Floorspace by ward, 2003



Source: ODPM Floorspace Statistics, 2003

2.7 Llansamlet has a strong share of all three sectors' floorspace. Cockett is highly industrialised and has the highest share of the 720,000 square metres of factory floorspace and the 516,000 square metres of warehousing floorspace.

3 CURRENT STRENGTHS OF SWANSEA'S INDUSTRIAL STRUCTURE

Current over and under-represented sectors

3.1 Table 3.1 below shows industrial sectors at a four digit level that have location quotients[1] (LQs) greater than 1.5 and more than 200 jobs. The list shows sectors in order of size, starting with the largest. Some statistics are confidential and so cannot be included in the table, but the relative size is indicated. Swansea is still well-represented in many manufacturing sectors – despite the fact that manufacturing is declining overall (it was previously even more strongly represented).

3.2 The largest and most over-represented sectors aside from manufacturing tend to be publicly-run sectors, such as general public service activities, hospital activities, higher education and social work.

3.3 Of the business sectors, only business services are well-represented, such as industrial cleaning and investigation and security activities. No high-value activities, such as financial intermediation or insurance and pension funding, are strongly over-represented.

[1] A location quotient (LQ) is a sector's share of total employment in the study area (in this case, Swansea) divided by that sector's share of total employment in Great Britain. Sectors with an LQ greater than 1 are over-represented in the area against the national norm and those with an LQ below 1 are under-represented. An LQ of 1 indicates that a sector accounts for the same share of total employment in the study area as in the national economy.

Table 3.1 LQs and sector size in Swansea Unitary Authority

	# jobs	LQ
8511 : Hospital activities	8,500	1.5
7511 : General (overall) public service activities	8,000	4.0
7470 : Industrial cleaning	3,500	2.2
8030 : Higher education	c	1.7
8532 : Social work activities without accommodation	3,300	1.5
8514 : Other human health activities	1,600	1.5
7460 : Investigation and security activities	1,100	1.9
2524 : Manufacture of other plastic products	c	3.3
5246 : Retail sale of hardware, paints and glass	700	1.5
3130 : Manufacture of insulated wire and cable	c	12.9
3162 : Manufacture of other electrical equipment not elsewhere classified	c	4.5
1513 : Production of meat and poultry meat products	c	1.5
2212 : Publishing of newspapers	c	2.3
2452 : Manufacture of perfumes and toilet preparations	c	5.2
4523 : Construction of highways, roads, airfields and sports facilities	c	1.6
5146 : Wholesale of pharmaceutical goods	c	2.0
5224 : Retail sale of bread, cakes, flour confectionery and sugar confectionery	400	1.8
5231 : Dispensing chemists	400	1.7
7250 : Maintenance and repair of office, accounting and computing machinery	c	4.1
1531 : Processing and preserving of potatoes	c	8.0
2521 : Manufacture of plastic plates, sheets, tubes and profiles	c	2.7
2522 : Manufacture of plastic packing goods	c	2.6
2612 : Shaping and processing of flat glass	c	5.1
2742 : Aluminium production	c	8.7
2953 : Manufacture of machinery for food, beverage and tobacco processing	c	6.9
9251 : Library and archive activities	300	1.9
2745 : Other non-ferrous metal production	c	18.5
2753 : Casting of light metals	c	10.6
3612 : Manufacture of other office and shop furniture	c	2.4
4012 : Transmission of electricity	c	3.9
4013 : Distribution and trade in electricity	c	2.3
7514 : Supporting service activities for the government as a whole	c	6.4

Source: Annual Business Inquiry 2003

Note: c denotes confidential statistics.

4 SUMMARY OF FORECASTS FOR SWANSEA

Underlying Assumptions of the Forecasts

Population

4.1 The employment forecasts were produced by Experian Business Strategies. They are linked to population forecasts, which are based on those produced by the Office for National Statistics data.

4.2 Swansea's population grew slightly between 1982 and 1991, with an increase of around 2,100 people. However, it subsequently declined by 5,800 people (2.5 per cent) by 2001[2]. The population basically stagnated in South West Wales, where population fell by less than 1 per cent, and in Wales, where the population increased by 1.4 per cent.

4.3 In Swansea, the population is only forecast to increase back to 1991 levels after 2016. By 2026, an additional 12,700 people are forecast to live in Swansea compared to 2001. The forecast growth rate is higher for Wales as a whole.

4.4 The population forecasts are directly linked to the employment forecasts, so changes in the population affect employment figures.

Table 4.1 Population Change and Forecasts, 1982-2026

	Swansea	SWW	Wales
1982	227,433	640,470	2,805,010
1986	226,831	639,213	2,812,913
1991	229,563	650,888	2,873,656
1996	227,363	647,700	2,891,431
2001	223,812	645,769	2,913,575
2006	225,735	654,194	2,967,368
2011	225,895	651,102	2,988,781
2016	227,981	654,482	3,032,170
2021	232,340	668,813	3,091,114
2026	236,497	682,125	3,146,994
% change 01-26	5.7%	5.6%	8.0%

Source: Experian Business Strategies.

Employment

4.5 In the long-term, the employment forecasts link directly to the population forecasts. The population levels give estimates of labour supply, using assumptions about the proportion of the population that will be working age, their economic activity rates and employment rates, as well as net commuting flows.

4.6 In the shorter-term, current employment and activity data (Annual Business Inquiry, Census etc) is used to proxy current employment levels, including the self-employed. Short-term economic growth will be based on previous trends, as well as views about the current position in the economic cycle and macroeconomic prospects for Great Britain (which feed down to regional prospects and then local prospects).

4.7 The employment forecasts are therefore tied to the population forecasts and any variation in these will result in deviations from these baseline forecasts. For example, a higher growth in population will lead to a requirement for higher employment levels (provided the commuting flows, economic activity rates and employment rates are to

[2] Before the publication of the 2001 Census, Swansea believed their population in 2001 was approximately 230,000 and forecasts were based on these numbers. However, the release of the Census figures showed the population in 2001 was closer to 223,000 people, representing a decline in population since 1991 rather than stagnation. Forecasts – including those used here – were accordingly amended in line with this lower figure (source: conversation with officer from Swansea City Council).

remain at similar levels). Provision will need to be made for this additional population i.e. sufficient employment space will need to be provided to accommodate the jobs. If space is not provided, the excess population will be either unemployed or economically inactive. In fact, population growth alone is a driver of employment, such as for public and consumer services.

4.8 A level of growth above the baseline (from an additional supply of sites for example bringing in inward-investment related jobs) will feed through to a requirement for more population in the area, or an increase in in-commuting or double-jobbing.

Baseline

4.9 The forecasts are essentially baseline forecasts, reflecting past trends and projected macroeconomic change. They may therefore be affected by policies that actively attempt to change a certain sector e.g. education employment may be affected by government policy, if it aimed to increase the ratio of staff to pupils.

Total Jobs Forecasts

4.10 Total jobs (including the self-employed) are forecast to increase from 111,200 in 2003 to 129,100 by 2026 – an increase of 16 per cent overall. Swansea is forecast to grow roughly in line with Wales, but slightly slower than South West Wales.

Table 4.2 Total Jobs Growth, 2003-2026

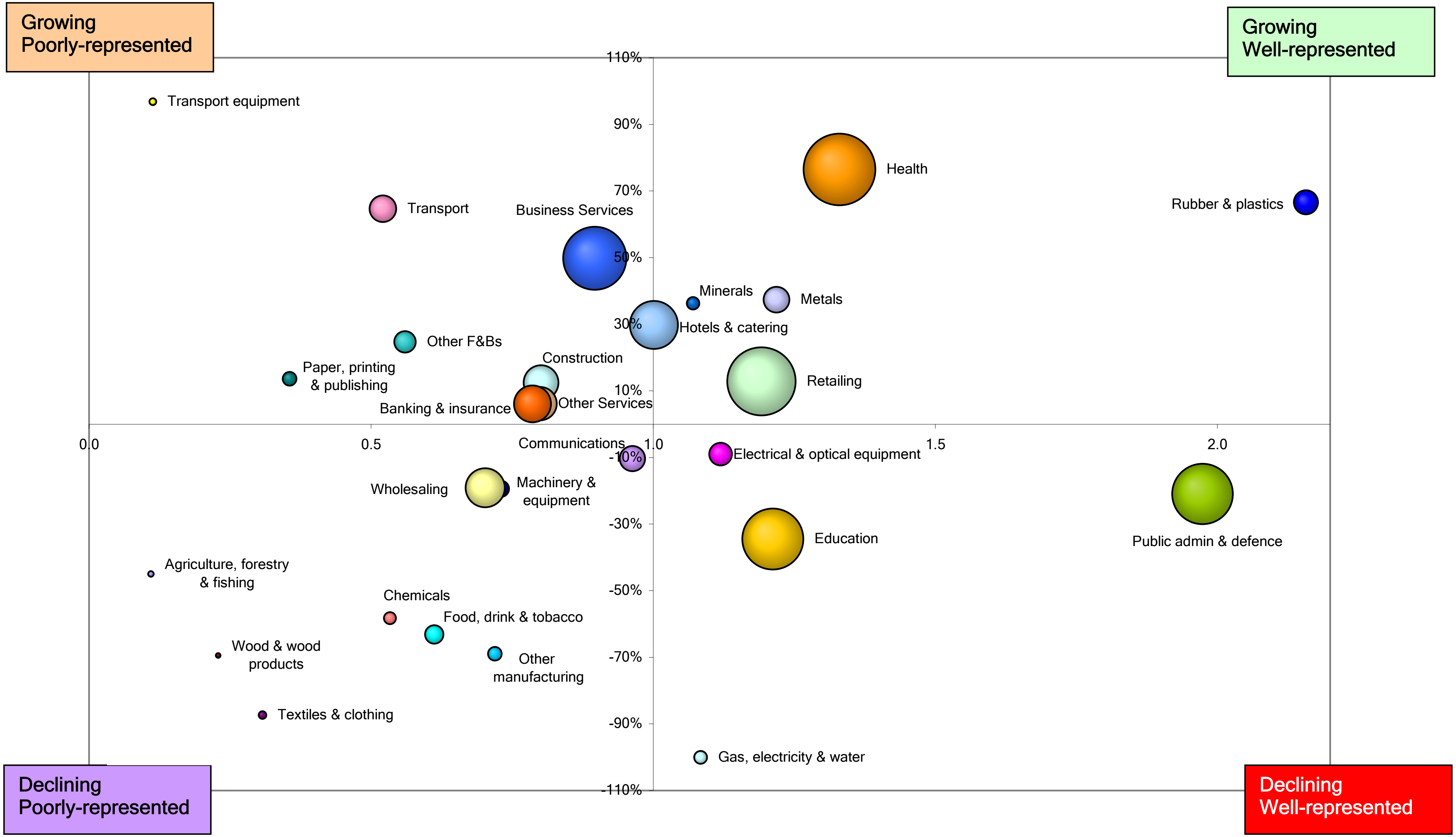
	2003	2016	Change 03-16	%	2026	Change 03-26	%
Swansea	111,200	119,100	7,900	7.1%	129,143	17,900	16.1%
South West Wales	275,393	296,672	21,279	7.7%	327,986	52,593	19.1%
Wales	1,285,222	1,374,523	89,301	6.9%	1,480,471	195,249	15.2%

Source: Experian Business Strategies, RTP

Sector Forecasts

4.11 In order to work out which sectors warrant closer analysis for future potential sectors in Swansea – particularly in the city centre – we look at the current size of each industrial sector in the economy, and plot this against its growth between 2003 and 2026[3]. The size of the bubble reflects the actual number of jobs in Swansea (i.e. the bigger the bubble, the more jobs in that sector). The chart therefore shows the relative size, importance and potential of each industrial sector.

[3] Source: Experian Business Strategies.


Growing
Poorly-represented
Growing
Well-represented
Declining
Poorly-represented
Declining
Well-represented
110%
90%
70%
50%
30%
10%
-10%
-30%
-50%
-70%
-90%
-110%
0.0
0.5
1.0
1.5
2.0
Transport equipment
Health
Rubber & plastics
Transport
Business Services
Minerals
Metals
Hotels & catering
Other F&Bs
Construction
Paper, printing
& publishing
Retailing
Banking & insurance
Other Services
Communications
Electrical & optical equipment
Wholesaling
Machinery &
equipment
Education
Public admin & defence
Agriculture, forestry
& fishing
Chemicals
Food, drink & tobacco
Wood & wood
products
Other
manufacturing
Textiles & clothing
Gas, electricity & water

4.12 We can see from the chart that the largest sectors in terms of actual job numbers currently are health, retailing, business services, public administration and defence and education.

4.13 The LQs are plotted on the x-axis. Sectors to the right of the y-axis are well-represented, whereas those to the left are under-represented.

4.14 The y-axis shows the percentage growth of each sector between 2003 and 2026 using the BSL forecasts. Sectors above the x-axis are forecast to grow, whereas those below the x-axis are forecast to decline.

Growing and well-represented

4.15 Sectors in this quadrant include:

- Health
- Retailing
- Hotels & catering
- Rubber & plastics
- Metals

4.16 Both health employment and retailing employment are very well-represented in Swansea and are forecast to grow up to 2026. We can see that although rubber and plastics are forecast to grow strongly and are very well-represented in the economy compared to the national average, the actual number of jobs is relatively small. Hotels & catering employment has an average representation in line with the country, and is forecast to grow up to 2026.

Growing and poorly represented

4.17 Sectors in this quadrant include:

- Business services
- Construction
- Transport
- Other services
- Banking and finance

4.18 These sectors are potential sectors to nurture, as they are forecast to grow, and therefore may increase their representation within the economy further.

4.19 Business services are forecast to grow particularly strongly up to 2026, although they are currently under-represented in the economy compared to the GB average. The size of the sector is currently quite large in terms of absolute job numbers.

Declining and well-represented

4.20 Sectors in this quadrant include:

- Public administration and defence
- Education
- Electrical and optical equipment

4.21 These are sectors that may cause concern. Both public administration and defence and education in particular are currently well-represented in the economy but are forecast to decline by 2026.

Declining and poorly represented

4.22 Sectors in this quadrant include:

- Wholesaling
- Communications
- Machinery & equipment
- Small manufacturing sectors

4.23 These sectors are less likely to cause concern than those that are declining and well-represented. Even though jobs numbers are forecast to decline, the sectors are not well-represented or represent a large number of jobs in the economy.

Conclusions

4.24 We will investigate in more detail the sectors that are:

- particularly well-represented and forecast to grow
  - Health
  - Retailing
  - Hotels & catering
- particularly well-represented and forecast to decline
  - Education
  - Public administration & defence
- under-represented and forecast to grow
  - Financial and business services – particularly business services

4.25 Most of these sectors have a propensity to locate in city centres (except for perhaps health and education). We will investigate how there may be more scope for such sectors to increase their presence in the city centre of Swansea in Chapter 6.

5 JOBS FORECASTS BY SECTOR

5.1 We consider forecasts for employment by sector, between 2003 and 2016 and 2026.

Table 5.1 Jobs Forecasts, 2003-2016-2021

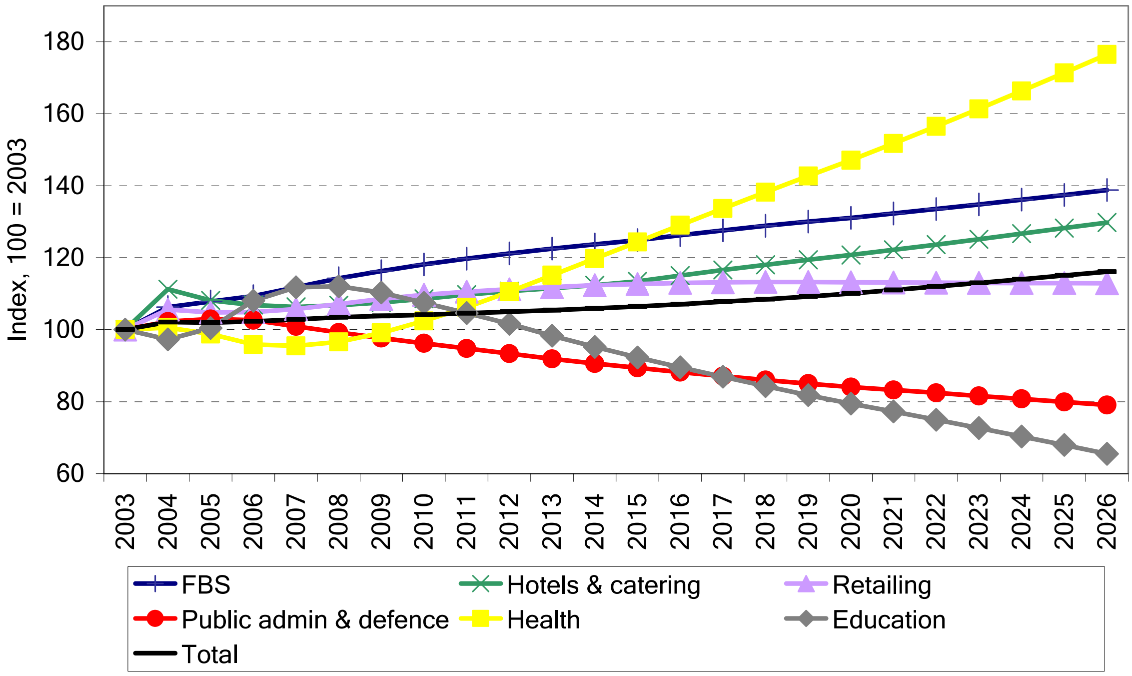
	2003	2016	Change 03-16	%	2026	Change 03-26	%
Health	14,900	19,300	4,400	30%	26,300	11,400	77%
Financial and business services	20,200	25,500	5,300	26%	28,000	7,800	39%
Hotels & catering	7,200	8,200	1,100	15%	9,300	2,100	29%
Retailing	14,400	16,200	1,900	13%	16,200	1,800	13%
Public administration & defence	10,000	8,800	-1,200	-12%	7,900	-2,100	-21%
Education	11,300	10,100	-1,200	-11%	7,400	-3,900	-35%
Total	111,200	119,100	7,900	7%	129,143	17,900	16%

Source: Experian Business Strategies

5.2 Health is forecast to grow the most by 2026 – by 77 per cent, or 11,400 jobs. Financial and business services – which are currently less well-represented compared to the national economy – are forecast to grow by 7,800 jobs, or 39 per cent.

5.3 Public administration and defence and education – both of which are currently well-represented in the economy – are forecast to lose employment by 2026.

Figure 5.1 Employment Forecast Index, 2003-2026



Source: Experian Business Strategies, RTP

Growing and Well-Represented

Health

Current Strengths

5.4 Within the health sector, Swansea's current over-representations are in:

- 8511 Hospital activities;

- 8514 Other human health activities; and
- 8532 Social work activities without accommodation.

5.5 This over-representation stems from the nine hospitals located around Swansea – of which the two largest are Morriston and Singleton, neither of which are in the city centre. However, the majority of the social services without accommodation employment is located in the city centre.

Trends

5.6 The industry is currently facing a serious problem in recruiting staff to lower paid work, such as nursing, in areas of high living costs and lower unemployment, where alternative employment is available. Policies, such as Key Worker Living, have been introduced to help combat the problem of affordable housing and discourage nurses from moving to alternative employment.

5.7 Current staff shortages in the industry, particularly for nurses and radiographers, are being combated by a variety of other measures including national recruitment campaigns, recruiting from a more diverse workforce, including abroad, return to work schemes, financial incentives for retainers, more flexible working hours and in the medium to longer-term changes in job roles and expansion of the training places, in particular for medical, nurse, therapy or other health professional students. Whilst national recruitment campaigns target all staff groups, international ones are aimed at the highly skilled workforce, in particular nurses and medical practitioners[4].

5.8 Increases in health-related employment will be particularly linked to:

- **Changes in government policy** Increases in hospital employment will be closely linked to government policy, which is currently directed towards increasing hospital staff and provision. For example, The NHS Plan 2000 set out requirements for organisational reforms and an expansion of the workforce. The government set a national target for over 100,000 additional staff by 2008, comprising consultants and GPs, nurses, therapists and scientists and 27,000 health care assistants. The Wanless Review suggests an additional 300,000 staff will be required in the NHS by 2020.
- **Changes in demographics** An ageing population is likely to increase requirements for hospital care in the future, which will also add to employment requirements.

Forecasts

5.9 Swansea, South West Wales and Wales are all forecast substantial increases in health employment by 2026. Given the hospital's current locations, however, it is unlikely that much of this employment will be relocated in the city centre. This is not typically a 'city centre' sector.

Retail

Current Strengths

5.10 Swansea is slightly over-represented in retail employment compared to the national average, as would be expected of a regional centre. As with the national economy, the largest sectors are supermarket employment and retail sale of clothes. Both of these sectors have grown strongly in Swansea since 1998.

5.11 A large proportion of the retail employment is located in the city centre or in Llansamlet ward, which contains out-of-town shopping.

[4] Source: Warwick Institute for Employment Research

Forecasts

5.12 Swansea, South West Wales and Wales are all set to enjoy increases in employment in retail up to around 2015, followed by a steadying of employment levels. The location for this additional employment in Swansea could potentially be located in the city centre, although there are also options to locate development away from the city centre.

5.13 Further details will be available from the Swansea retail study about future requirements in which retail sectors. However, results are currently preliminary and so further conclusions will be made following firmer results.

Hotels and Catering

5.14 Roughly 85% of those employed in hotels and catering work in the catering sector in both Swansea Unitary Authority and Swansea city centre. Most of the hotel employment is concentrated in the city centre, although Llansamlet and South Gower have the next highest concentrations. The city centre also contains the lion's share of restaurant, bars and catering employment, although again Llansamlet and South Gower, as well as Oystermouth, have the next highest proportions.

Trends

5.15 Visit Britain forecast that in 2005 Britain will experience a steady increase in the value and volume of inbound tourism[5]. However, this was before the bomb attacks of July 2005 and the report states that terrorist attacks may impact inbound markets adversely.

5.16 Wales may benefit from increasing domestic holidays. Swansea in particular might look to attract people to its city centre as a 'wet day' attraction as part of a longer holiday in Swansea Bay. Another area Swansea may look to exploit is improving its conferencing facilities as part of a wider package of development being considered as part of the masterplan.

Forecasts

5.17 All areas are forecast an increase in hotels and catering employment. Where this additional employment may be located is explored in further detail in Chapter 6.

Growing but Under-Represented

Financial and Business Services

Current strengths

5.18 Swansea is currently under-represented in all broad financial and business services sectors compared to the national economy. As in the national economy, the largest sector is other business activities (sector 74), which forms part of business services.

5.19 Breaking the broader sectors down shows that Swansea is over-represented in:

- 7250 Maintenance and repair of office, accounting and computing machinery;
- 7460 Investigation and security activities;
- 7470 Industrial cleaning;
- 6603 Non-life insurance; and
- 6512 Other monetary intermediation.[6]

[5] *Forecasts for Inbound Tourism*, VisitBritain November 2004
[6] Defined by LQs greater than 1 and there being more than 400 jobs in the sector.

5.20 Swansea also has 2,400 people employed in labour recruitment and personnel (which includes the temporary workers employed by the recruitment firms in whichever sector they work). This represents a similar proportion to the national average, but includes a substantial number of people. Just under half of these employees are concentrated in the city centre.

5.21 The majority of the over-represented sectors are towards the lower-value end of financial and business services.

Current Floorspace

5.22 Financial and business services are often used to proxy office employment. However, this definition must be used with care. Not all of the business services sectors will occupy office space, such as industrial cleaning and maintenance and repair of office, accounting and computing machinery. These are more likely to occupy industrial space.

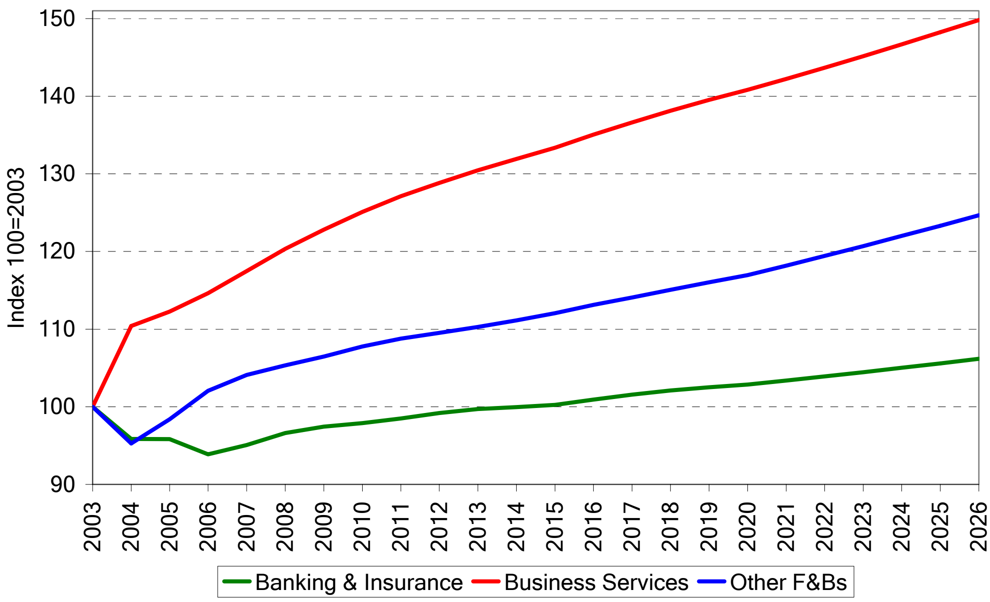
5.23 The labour recruitment sector includes those people who are employed in temporary employment, regardless of the actual sector in which they work. For example the Panorama of European Business shows that roughly 30% of the temporary work businesses' clients are manufacturers and roughly 45% are in services.

Forecasts

5.24 Swansea's financial and business services employment is forecast to increase steadily until 2026, slightly above the rate of both Wales and South West Wales.

5.25 Within financial and business services, Swansea's main growth is expected to be in business services. This net increase represents 7,200 jobs, compared to net increases of around 300 jobs in banking and insurance and other financial and business services.

Figure 5.2 FBS employment change by sector, Swansea, 2003-2026



Source: Experian Business Strategies, RTP

Trends

5.26 Business services have increased in importance across Europe over the past 30 years as manufacturing has been out-sourced and in response to the growing complexity of business processes[7]. Business services are a key element to the competitiveness of enterprises and an important factor in driving long-term growth.

5.27 The Quarterly Panorama of European Business Statistics (2/2005) states that in the final quarter of 2004 within the services sector, the most dynamic activities in terms of increasing numbers of employees was other business activities. This grew by 1.2%[8] for the final quarter of 2004 in the EU-25.

Investigative and security services

5.28 This sector has greatly benefited from trends in out-sourcing and according to the Panorama of European Business, the UK has strong employment in this sector compared to other EU countries. This sector is at the lower end of the scale of labour productivity.

Industrial cleaning

5.29 Productivity is amongst the lowest out of the service sectors. The Panorama of European Business highlighted that the UK is a large employer of employees for industrial cleaning companies compared to other EU countries.

Future Floorspace

5.30 As much of the forecast increases are for business services, not all of the additional jobs will occupy office floorspace. We would suggest that if Swansea is looking to increase its office floorspace, particularly in the city centre, it will need to focus more on increasing the higher-value financial sectors, such as R&D, financial intermediation, insurance and pension funding and real estate activities.

5.31 We are interested to note that the development of the Institute of Life Science has been approved by Swansea planners. This is to be attached to the university's School of Medicine and will house up to 350 researchers. These are likely to occupy office floorspace in the R&D sector, which tends to be higher value than the business services sectors in which Swansea is traditionally stronger. Although this development will not be located in the city centre, the development has the potential to encourage other firms to the area, which may benefit from 'clustering' near to the new development. For example, as the deal is reported to aim to foster a partnership between the Welsh Assembly, Swansea University and IBM, there may be opportunities for developing the IT sector further in the area.

Declining but Over-Represented

Public Administration and Defence

Current Strengths

5.32 Within the public administration and defence sector, Swansea's current strength lies mainly in general (overall) public administration (SIC code 7511). The jobs in this sector are mainly concentrated in Mynyddbach ward, which we understand includes the DVLA and Swansea city centre, which includes the City Council.

Trends

5.33 The major drivers of change in public administration stem from policy initiatives and political change.

- **Policy initiatives** A programme of civil service reform is being implemented by all governmental departments and agencies across the UK following the publication of the Lyons Report. Swansea has been highlighted as a 'top quartile' location for

[7] Source: Panorama of European Business, 2000 edition
[8] Seasonally-adjusted figure.

information support contact centres and interactive contact centres[9] and so may potentially benefit from a one-off relocation. For example, Public Finance Magazine reported in May 2005 that the Department for Transport's management board recommended the relocation of its payroll function from Hastings to Swansea[10].

A different policy initiative that would impact employment in public administration is considered by the Warwick Institute for Employment Research, who suggest that:

'The national e-government strategy may influence future employment, although the impact is unclear; this strategy aims to have all public sector services available electronically by 2005.'

- **Political change** Changes in the contracting of public administration work may also affect jobs numbers. For example, the 2005 Conservative Party manifesto claimed it would '*freeze civil service recruitment, remove 235,000 bureaucratic posts, and cut or abolish 168 public bodies at the UK level*'[11]. Whilst such a policy is currently unlikely to be implemented in the current political climate, political change may result in jobs losses in the sector.

Forecasts

5.34 All areas are forecast a decline in public administration and defence employment, amounting to over 20 per cent by 2026.

5.35 We highlight here that the employment forecasts are baseline, and we question that they will decline as dramatically as indicated by the forecasts. Although the sector is vulnerable to decline because it is over-represented within the economy, there are opportunities for further employment in the area. Swansea needs to look to stabilise this level of employment, as existing employment might leave or shed jobs in down-sizing. There are opportunities for further expansion in public administration, for example with a one-off relocation of jobs to the area, either as part of the Lyons review, or with expansion of functions for the Welsh Assembly.

Education

Current Strengths

5.36 Employment in education in Swansea includes nursery, primary and secondary education. There are also further education colleges, including Swansea College and Gorseinon College. As in all areas, these colleges will tend to serve the local population.

5.37 Swansea has a large higher education sector, which includes Swansea Institute of Higher Education and the University of Wales Swansea. As well as providing opportunities for local young people, these institutes serve the regional, Welsh, UK and inter-national markets. Expansion of these institutes will not necessarily be linked to local population expansion.

Trends

5.38 In the future, changes in education employment will be linked to several factors. Some of the factors will depend upon the type of educational institution.

Nursery, Primary and Secondary Education

- **Local population change** Primary and secondary education in particular drive the demand for education employment. A declining younger population will result in a lower demand for teachers over time.

[9] Source: *Independent Review of Public Sector Relocation: Comparative Assessment of Locations*, Kings Sturge, December 2003
[10] Source: http://www.cipfa.org.uk/publicfinance/news_details.cfm?News_id=23868
[11] Conservative Party Welsh Manifesto, p.3

- **Policy** Government policy is strongly linked to employment in education. For example, policy requiring higher teacher-to-pupil ratios will result in an increased demand for teachers.

Higher Education

- **Policy** Government policy will affect employment by setting, for example, policies to increase admission to more people. For example, one of the Government's policies on Higher Education seeks to '*Enable more people to enter higher education, benefiting both individuals and the economy's need for higher level skills*'[12]. It has also pledged to increase funding to the Higher Education sector '*to meet the long-term challenge to maintain and improve high standards, expand and widen access, strengthen links with business, and compete globally*.'[13]
- **Aspirations of the Institute** Some institutions will have strong aspirations to expand their provision. This will be linked to some extent to government policy, for example, if funding is to increase, or policy is set to expand provision.
- **National population change** Higher education is less subject to volatility in local population change as its students are drawn from all over the UK and abroad, as well as some from locally. All else being equal, changes in population alone will change the demand for higher education places.
- **Political change** As ties with other European countries become closer and travel between countries eases, demand may increase for higher education in the UK from overseas students.

Benefits of Higher Education

5.39 Higher education brings many benefits alongside those of direct employment at the university. Firstly, indirect employment is created, such as from the university purchasing goods and services from local suppliers. The university will contract people to undertake building work and provide professional services. Students and staff will also spend in the local economy, such as on rent, food, books, leisure and social activities. This is an 'induced' effect.

5.40 One of the most important and potentially most beneficial impacts is the possibility of technology and knowledge transfers to local companies. Research undertaken at universities can help to create 'spin-off' companies that use the research and knowledge to commercial advantage, or attract 'spin-in' companies, which are companies attracted to the location to benefit from clustering around other, similar companies and knowledge-transfer from the university. Loughborough Innovation Centre is an example of a successful set-up, with engineering, sports and software companies locating there or spinning-out from the university, building on the research strengths of the university.

5.41 The higher education institutes therefore act as attractions, the result of which ultimately results in higher employment in the area. We understand that such benefits are already apparent in Swansea, with the location of Techniums and planning agreement for the Institute of Life Sciences at the University. We suggest that further exploitation of links between the university and companies should be encouraged.

Forecasts

5.42 Following a rise in education employment up to 2008, employment is forecast to fall substantially by 2026 to around 65% of its level in 2003.

[12] Source: White Paper: *The Future for Higher Education*, Department for Education and Skills, 2003
[13] ibid

5.43 As the forecasts are tied to population change, we envisage that the much of the forecast decline in education is likely to result from declines in the school-age population over the next 20 years or so.

5.44 However, with such a strong higher education presence in the city, which cater for national demand rather than just local, we question that the declines in employment are likely to be as strong as shown in the chart. Furthermore, we understand that the University of Wales in Swansea is looking to double in size by around 2026, which is likely to mitigate some of the decline in employment.

6 POTENTIAL IMPACTS FOR THE CITY CENTRE

Method

6.1 Taking the forecasts for Swansea as a whole, we analyse in this chapter the potential for locating these jobs in Swansea city centre.

6.2 We firstly consider what the net changes would be if Swansea were to keep the same proportion of the sector's employment in its city centre e.g. if x% of all office employment is in Castle ward in 2003, we assume x% of all office employment will still be in Castle ward in 2016 and 2026 - even if the total amount increases. This gives baseline figures for net additional employment.

6.3 We then go on to explore whether a greater share could or should be located in the city centre and how much more this should be. We explore different possibilities by comparing the proportion of jobs that locate in the city centre in benchmark cities - Cardiff, Derby, Kingston-Upon-Hull, Leicester, Plymouth, Sheffield and Southampton[14]. Swansea tends to have lower proportions of employment in sectors that traditionally locate in city centres e.g. offices and hotels and restaurants. We explore the extent to which Swansea could seek to improve this lack of employment in its city centre to bring it more in line with other cities.

6.4 It is important to note here that we have not looked at the supply of land or floorspace in the city centre; increasing proportions of employment in that location can only occur if there is sufficient supply of land and floorspace to accommodate the jobs.

Estimating Castle Ward Baseline Employment

6.5 To estimate the city centre baseline employment[15], we took the proportion of jobs in Castle ward according to the Annual Business Inquiry in 2003 and added on an estimate for self-employment (using Census 2001 data). We then applied the same percentage growth for each sector as is forecast for Swansea Unitary Authority by Experian to the Castle ward estimates for each sector.

Offices

Scenario 1: Baseline

6.6 In total, approximately 7,800 net additional financial and business service jobs are forecast for Swansea Unitary Authority between 2003 and 2026, with 5,300 forecast by 2016. We assume that all of these jobs occupy office floorspace[16]. Using a proxy of 18 square metres per employee[17] gives a requirement for:

- 95,300 square metres net additional floorspace by 2016, and
- 140,700 square metres by 2026[18].

6.7 As these forecasts are for Swansea as a whole, we do not know how many of these jobs are likely to locate in the city centre. Using an estimate of 26 per cent that

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[14] These cities were chosen because they are similar to Swansea in terms of population figures, size, relative regional importance and existence of regeneration companies.
[15] Using Castle ward as an estimate for the City Centre.
[16] However, we know that some - if not large proportions - of this floorspace might actually occupy industrial floorspace, such as industrial cleaning. This means that the estimates here are likely to be towards the top end of possibilities.
[17] Source: *The Use of Business Space: Employment Densities and Working Practices in South East England,* Roger Tym & Partners for SERPLAN, 1997
[18] This does not include any allowance for friction or choice.

shows the current proportion of financial and business service sector jobs located in the city centre still being in the city centre in 2016 and 2026 gives net requirements for:

- 24,300 square metres net additional floorspace by 2016, and
- 36,000 square metres by 2026.

Scenario 2: All net additional office employment located in the city centre except that at SA1

6.8 We know, however, that SA1 is to contain approximately 65,000 square metres office floorspace. If we assumed all of the rest is allocated to the city centre, it would have:

- 30,300 square metres net additional floorspace by 2016, and
- 75,700 square metres by 2026.

6.9 However, this would mean there would have to be no additional developments elsewhere in Swansea e.g. in the Swansea Vale or the enterprise parks, and new floorspace in these locations would arise from redevelopment of existing space or intensification.

6.10 Furthermore, there is a danger that the new development at SA1 will attract existing occupiers away from the city centre, who would rather occupy new, high profile space than remain in their existing buildings. This may leave large swathes of Swansea city centre unoccupied, with even higher proportions of vacant space[19].

Scenario 3: Highest Scenario

6.11 Currently only 26 per cent of the financial and business services employment is located in the city centre[20]. Compared to most of the benchmark cities, this proportion is low.

Table 6.1 Benchmark Cities, FBS employment in the city centre, 2003

	% FBS jobs in City Centre Ward
Cardiff	35%
Derby	54%
Hull	64%
Leicester	65%
Plymouth	52%
Sheffield	34%
Southampton	77%
Swansea	31%

Source: Annual Business Inquiry, 2003, RTP

NB. The Swansea figure differs slightly to that given in paragraph 6.11 as it is based on Annual Business Inquiry data, which does not include the self-employed (Experian Business Strategy figures do include the self-employed). We use ABI data as equivalent data is not available for benchmark areas.

6.12 Assuming that Swansea could gain the same proportion of employment in its city centre as Southampton by 2026 (i.e. the Castle ward contains 77% of Swansea's total financial and business services sector employment), this would require a net additional 197,700 square metres of floorspace by 2016 and 293,000 square metres by 2026. This is higher than the amount required for the whole of Swansea and so would require large relocations of employment from elsewhere if the baseline forecasts are to hold.

[19] The current vacancy rate is estimated at approximately 11%, with the vast majority being second-hand and located in the city centre (source: Lambert Smith Hampton Research).
[20] Source: Experian Business Strategies

Table 6.2 Forecasts and Floorspace Requirements

Scenario	2003	2016	2021	03-21	*Flsp (sqm)*	03-26	*Flsp (sqm)*
1 Swansea UA	20,200	25,500	28,000	5,300	*95,300*	7,800	*140,700*
Swansea CC	5,300	6,600	7,300	1,400	*24,300*	2,000	*36,000*
2 Swansea CC	5,300	5,900	9,400	1,700	*30,300*	4,200	*75,700*
3 Swansea CC	5,300	16,200	21,500	11,000	*197,700*	16,300	*293,000*

Source: Experian Business Strategies, RTP

Public Administration (excluding defence)

6.13 As well as financial and business services, some public administration employment also occupies office floorspace. The employment forecasts show a net decline for Swansea as a whole of 1,300 by 2016 or 2,100 by 2026[21]. This equates to a net loss (assuming floorspace per employee of 18 square metres) of 23,800 square metres by 2016 and 38,600 square metres by 2026.

6.14 If these are subtracted from the total for Swansea financial and business services, there is a net requirement for 71,500 square metres by 2016 or 102,100 by 2026.

6.15 SA1 would account for most of the new requirement up to 2016, leaving just 6,500 square metres net new requirement. By 2026, there is a forecast need for 37,100 square metres net new requirement.

6.16 It is impossible to predict exactly *where* the losses may occur within Swansea. We suggest that as much of the public administration employment is currently in the city centre or near the Swansea Vale Business Park/ Morriston, these are the locations in which much of the loss may potentially occur and vacant office floorspace would therefore increase and become available for redevelopment. The net additional employment identified earlier could in theory occupy this vacated floorspace (either in the same buildings or in redeveloped buildings on the same site) rather than requiring new sites (depending upon requirements).

Hotels and Catering

Scenario 1: Baseline

6.17 Hotels and catering employment is forecast to increase by 1,100 jobs by 2016, or 2,100 by 2026. Taking the current proportion of employment in the city centre compared to the city as a whole (36 per cent) gives estimates of an additional 400 jobs in the city centre by 2016, or 800 by 2026.

6.18 Assuming that the proportion of hotel jobs to catering jobs remains at a similar level in the future (approximately 15 per cent in hotels and 85 per cent in restaurants and catering), by 2026, the net additional employment for Swansea as a whole equate to approximately 290 new bed spaces at hotels, and 8,500 square metres of restaurant floorspace[22].

Scenario 2: Highest

6.19 However, compared to other cities, Swansea has a smaller proportion of employment in its city centre ward. For example, 70 per cent of Southampton's hotels and catering employment is in the city centre.

[21] These numbers differ slightly to Table 4.2 as we estimate forecasts for public administration alone (i.e. excluding defence).

[22] This is based on 2.5 beds per employee and 13 square metres of restaurant floorspace per employee. Source: *Employment Densities: A Full Guide*, English Partnerships.

Table 6.3 Benchmark Cities, hotels and catering employment in the city centre, 2003

	% h&c jobs in city centre ward
Cardiff	39%
Derby	55%
Hull	43%
Leicester	57%
Plymouth	52%
Sheffield	16%
Southampton	70%
Swansea	37%

Source: Annual Business Inquiry, 2003

NB. The Swansea figure differs slightly to the figure given in paragraph 6.17 as it are based on Annual Business Inquiry data, which does not include the self-employed (Experian Business Strategy figures do include the self-employed). We use ABI data as equivalent data is not available for benchmark areas.

6.20 If we assume that Swansea is to have the same proportion in its city centre by 2026, it would have an additional 2,000 jobs in the city centre by 2016 and 3,900 by 2026. However, given that this is more than the net increase in Swansea as a whole, this would require relocation of employment from elsewhere.

6.21 Furthermore, it is unlikely that all this amount of additional employment would locate in the city centre given the new development at SA1, which includes new hotels and new hotels and catering facilities that are likely to develop further around the New Stadium at Morfa..

Swansea City Centre: Strategic Framework

Technical Appendix 1:
STRATEGIC AND SOCIO-ECONOMIC ISSUES

1.3 Benchmarking Cities (October 2005)

ROGER TYM & PARTNERS
Planners and Development Economists

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CONTENTS

1 INTRODUCTION

1.1 As part of the economic background to the Strategic Framework for Swansea City Centre, we have compared Swansea's City Centre to those of other cities around the country.

1.2 We chose seven other cities for comparison, namely Cardiff, Derby, Kingston-Upon-Hull, Leicester, Sheffield, Southampton and Plymouth. These were chosen by selecting cities of similar size, regional significance and presence, and focus on city centre regeneration.

1.3 We compared Swansea City Centres to other City Centres and to the rest of the City using various factors, including:

- Type of jobs
- Number of jobs
- Change in numbers of jobs
- Population
- Dwelling numbers

1.4 This gives an idea of:

- How Swansea City Centre compares to the rest of Swansea – i.e. where its employment is concentrated;
- How Swansea City Centre compares to other City Centres, to see how its make-up of industries, population and housing mix might differ to what would be 'expected' of a City Centre; and
- How the City Centre has changed compared to other City Centres and the Urban Area.

Method

1.5 We selected statistical areas to use as proxies for the City Centres of these Cities by taking ward-level data for the Authorities within which the cities fall, and assessing which wards have the highest concentration of jobs, particularly in office, retail and other services sectors. There are generally one or two wards within an Authority that stand out as having particularly high concentrations of these employment sectors[1]. We cross-referenced these wards with the ODPM definitions of the town/city centre and also checked in GIS maps to see where any obvious city centre boundary might lie. The wards we chose to use are listed in Appendix 1. We could not use a more detailed geographical area as data is not available at this level for employment.

1.6 Instead of using the District boundary as the definition of the cities, we have used the Office of National Statistics (ONS) definition of an 'Urban Area'. Urban Areas are defined by the Office of the Deputy Prime Minister (ODPM) to be settlements with populations of 10,000 or more. These tend to be larger than individual Districts as employment and population 'spill over' District boundaries but still form part of the natural 'urban area' of the City.

1.7 Derby City Centre is comprised of three wards, and Plymouth and Southampton both two wards. The other benchmark areas are proxied by just one ward. For this reason, we need to be careful when looking at the proportion of employment in the City Centre compared to the Urban Area as these three areas' City Centres cover a larger geographical spread and so are more likely to contain higher numbers of jobs and

[1] Some out-of-town retail centres mean the retail concentration may be lower in some city centres, but this can be cross-referenced with local knowledge of the city and with the ODPM Town Centre definition.

people. However, the City Centres and jobs will be concentrated in only certain parts of these wards and so the data should not be strongly affected – where the City Centre finishes, the job density is likely to be much lower.

2 COMPARISONS

Employment

Number of Jobs

2.1 The total number of jobs in the City Centres and in different sectors is outlined in Table 2.1 below. The percentage figure shows the proportion that the jobs in the City Centre form of all jobs in the Urban Area.

Table 2.1 Total number of Jobs

Urban Areas	City Centre	Urban Area	Total
Cardiff	46,374	197,468	*23%*
Derby	49,392	127,617	*39%*
Hull	41,294	153,359	*27%*
Leicester	55,257	221,249	*25%*
Plymouth	30,656	110,998	*28%*
Sheffield	43,118	311,612	*14%*
Southampton	59,143	168,793	*35%*
Swansea	24,284	132,278	*18%*

Source: Annual Business Inquiry, 2003

2.2 This analysis is limited to the extent that it is based on the ward definitions, and so analysis depends on there being a good fit between the ward and the city centre. For example, the Southampton definition of the City Centre includes three wards, and Derby and Plymouth both have two wards. However, despite this, we can see from this analysis that Swansea still has a smaller proportion of its jobs in the City Centre than all of the other cities, except for Sheffield, and the absolute number of jobs is much lower.

Types of Jobs

2.3 In this section we look at three different measures:

- The percentage of jobs that are concentrated in the city centre as a proportion of the total jobs in the urban area (e.g. if there are 1,000 manufacturing jobs in the urban area and 100 manufacturing jobs in the city centre, then 10% of the total jobs are concentrated in the city centre);
- The percentage of the total that the type of job comprises (e.g. if there are 1,000 jobs in total in the city centre and 100 are in manufacturing, then manufacturing makes up 10% of the total jobs); and
- The change in the number jobs in the Urban Areas and the City Centres between 1996 and 2002[2].

Financial and Business Services

2.4 In absolute terms, financial and business services (FBS - defined here to be the broad category 'banking, finance and insurance' sector) account for very few jobs in Swansea compared to elsewhere. In the urban area, it forms a similar proportion of total jobs to most other areas, although Cardiff and Southampton have a higher proportion. In the city centre, it forms a smaller proportion of jobs compared to most other areas, except for Derby and Hull, which have similar proportions.

2.5 Swansea does not have a high proportion of its FBS employment in the City Centre, with only 27% of all its FBS jobs located there. This is on a par with Sheffield. All other

[2] For these years we used the 1991 Frozen Wards definitions as given in Appendix 1 which allowed us to use the same geographical areas across the time period. We could not use these geographical areas for 2003.

locations have a larger proportion of their FBS employment concentrated in the City Centre.

Table 2.2 Financial and Business Services Jobs

	City Centre, 2003	Urban Area, 2003	% of total concentrated in City Centre	% of whole in City Centre	% of whole in Urban Area	Change 96-02 City Centre	Change 96-02 Urban Area
Cardiff	13,696	42,370	*32%*	30%	21%	*52%*	*25%*
Derby	9,149	19,883	*46%*	19%	16%	*20%*	*39%*
Hull	9,689	19,088	*51%*	23%	12%	*13%*	*16%*
Leicester	17,450	34,428	*51%*	32%	16%	*57%*	*31%*
Plymouth	8,162	16,231	*50%*	27%	15%	*23%*	*5%*
Sheffield	14,896	53,990	*28%*	35%	17%	*43%*	*21%*
Southampton	20,484	38,343	*53%*	35%	23%	*4%*	*11%*
Swansea	5,237	19,672	*27%*	22%	15%	*36%*	*29%*

Source: Annual Business Inquiry, 2003, 2002, Annual Employment Survey Rescaled 1996

2.6 Swansea's employment in FBS in the City Centre has increased since 1996 – by 36%. This is quite strong compared to benchmark areas, which range from just 4% increase in Southampton up to 57% growth in Leicester. However, between 1991 and 1996, employment in FBS in Swansea declined by around 1,200 jobs – around 24%. This statistic also masks the fact that the actual number of jobs is low, and despite this growth, representation of these jobs in the City Centre is poor. Without this recent growth, representation would have been even lower. We explore further in '*Economic Forecasts for Swansea'* to where these jobs have been lost (and conclude that out-of-town developments, such as the Enterprise parks, have resulted in the declining numbers of FBS employment in Swansea City Centre).

Retail

2.7 Retail employment is quite similar as a proportion of total employment across the urban area, forming between 11% and 14% of the total. Of the total employment in the city centre, almost a quarter is in retail. This is the highest figure of all the benchmark areas. This, however, does not signify that Swansea's City Centre is particularly strong for retail, but is more a factor that there are comparatively few jobs in the City Centre and fewer jobs in 'traditional' City Centre sectors e.g. FBS.

2.8 This is clear when considering the percentage of total retail jobs concentrated in the City Centre. Retail employment is reasonably concentrated in the City Centre compared to elsewhere, although it is towards the lower end of the benchmarking figures. Retail is particularly low in Sheffield City Centre because of the large out-of-town development at Meadowhall, off the M1. We know there are also concentrations in out-of-town shopping centres in Swansea, including in Llansamlet ward.

2.9 Retail employment increased in the City Centre by approximately 20% between 1996 and 2002 - slightly slower than most comparators, and much slower than Southampton, which grew at 78%.

Table 2.3 Retail Jobs

	City Centre 2003	Urban Area 2003	% of total concentrated in City Centre	% of whole in City Centre	% of whole in Urban Area	Change 96-02 City Centre	Change 96-02 Urban Area
Cardiff	7,956	22,738	*35%*	17%	12%	*23%*	*11%*
Derby	6,530	14,141	*46%*	13%	11%	*33%*	*10%*
Hull	6,306	18,461	*34%*	15%	12%	*23%*	*11%*
Leicester	7,786	26,771	*29%*	14%	12%	*0%*	*9%*
Plymouth	6,652	13,671	*49%*	22%	12%	*34%*	*12%*
Sheffield	4,396	37,921	*12%*	10%	12%	*19%*	*11%*
Southampton	8,513	24,153	*35%*	14%	14%	*78%*	*10%*
Swansea	5,907	17,753	*33%*	24%	13%	*20%*	*11%*

Source: Annual Business Inquiry, 2003

Public Administration, Education and Health

2.10 Swansea Urban Area has a larger proportion of its employment in public administration, education and health compared to the benchmark areas. It also forms a comparatively large proportion of employment of the City Centre's total jobs – for the same reason that retail does (see paragraph 2.7).

2.11 However, there is not a strong concentration of public administration, education and health employment in Swansea City Centre compared to elsewhere. This is partly because Swansea's hospitals are located outside of the City Centre, in Morriston and Singleton wards. Education is unlikely to concentrate in any City Centre and so it is unlikely that this will differ between cities. Swansea has a larger concentration of public administration employment in Mynddbach ward, which we understand homes part of the DVLA.

2.12 Between 1996 and 2002, employment declined in the City Centre – by around 26% although it increased in the Urban Area by 14%. This shows clearly that new employment was locating elsewhere in the District.

Table 2.4 Public Administration, Education and Health Employment

	City Centre 2003	Urban Area 2003	% of total concentrated in City Centre	% of whole in City Centre	% of whole in Urban Area	Change 96-02 City Centre	Change 96-02 Urban Area
Cardiff	12,623	63,960	*20%*	27%	32%	*-12%*	9%
Derby	12,075	34,264	*35%*	24%	27%	*109%*	21%
Hull	12,057	43,573	*28%*	29%	28%	*-8%*	-10%
Leicester	16,267	63,411	*26%*	29%	29%	*-26%*	17%
Plymouth	6,026	35,768	*17%*	20%	32%	*-29%*	2%
Sheffield	14,805	89,280	*17%*	34%	29%	*8%*	29%
Southampton	9,474	42,127	*22%*	16%	25%	*-21%*	7%
Swansea	6,679	44,751	*15%*	28%	34%	*-26%*	14%

Source: Annual Business Inquiry, 2003

Other Services

2.13 Other services comprises sewage and refuse disposal, activities of membership organisations not elsewhere classified, other service activities, private households as employers of domestic staff, extra-territorial organisations and bodies. Swansea City Centre has an average proportion of such employment compared to benchmark areas.

2.14 Swansea has an average proportion of these jobs in both the Urban Area and the City Centre. It is also middle-ranking compared to elsewhere when considering the proportion of jobs concentrated in the City Centre.

2.15 Employment in other services declined in Swansea – although not as fast as in Cardiff or Derby. It also grew more slowly in the Urban Area compared to most comparators. However, what growth there was occurred outside of the City Centre. Employment in this sector grew strongly in the other benchmark cities except Leicester, where it stagnated, and the sector grew in all Urban Areas except Leicester. It seems that this is a growth sector in some City Centres, but not all.

Table 2.5 Other Services Employment

	City Centre 2003	Urban Area 2003	% of total concentrated in City Centre	% of whole in City Centre	% of whole in Urban Area	Change 96-02 City Centre	Change 96-02 Urban Area
Cardiff	3,285	13,148	*25%*	7%	7%	*-27%*	4%
Derby	2,732	5,242	*52%*	6%	4%	*-12%*	42%
Hull	1,477	6,802	*22%*	4%	4%	*20%*	23%
Leicester	3,172	9,201	*34%*	6%	4%	*-1%*	-9%
Plymouth	1,525	4,741	*32%*	5%	4%	*14%*	31%
Sheffield	1,573	15,720	*10%*	4%	5%	*58%*	51%
Southampton	3,761	8,493	*44%*	6%	5%	*75%*	57%
Swansea	1,443	5,529	*26%*	6%	4%	*-9%*	15%

Source: Annual Business Inquiry, 2003

Hotels and Restaurants

2.16 All of the comparator areas have between 5% and 7% of their employment in hotels and restaurants. Swansea City Centre's employment is reasonably well-represented in hotels and restaurant employment, with one of the higher comparative figures.

2.17 As a proportion of total employment concentrated in the City Centre, Swansea ranks towards the middle, with around a third of its jobs located there. Plymouth, Southampton and Derby have substantially more.

2.18 Employment increased in hotels and restaurants in Swansea City Centre by 19% - more than in Derby and Plymouth where employment declined, on a par with Derby, but less than all other benchmarks. The City Centre gained more of the growth than the Urban Area as a whole.

Table 2.6 Hotels and Restaurant Employment

	City Centre 2003	Urban Area 2003	% of total concentrated in City Centre	% of whole in City Centre	% of whole in Urban Area	Change 96-02 City Centre	Change 96-02 Urban Areas
Cardiff	3,753	11,388	*33%*	8%	6%	41%	5%
Derby	4,016	9,058	*44%*	8%	7%	16%	6%
Hull	2,547	8,435	*30%*	6%	6%	-8%	5%
Leicester	3,603	10,026	*36%*	7%	5%	47%	4%
Plymouth	3,276	6,753	*49%*	11%	6%	-1%	5%
Sheffield	2,163	17,785	*12%*	5%	6%	23%	6%
Southampton	4,269	8,935	*48%*	7%	5%	53%	5%
Swansea	2,567	7,508	*34%*	11%	6%	19%	6%

Source: Annual Business Inquiry, 2003

Knowledge-Based Industries

2.19 In absolute numbers, Swansea has a very low number of jobs in knowledge-based industries[3]. These jobs form only 11% of total employment in the Urban Area – on a par with Hull, but lower than all other comparators. Of those knowledge-based industries, Swansea City Centre homes a similar proportion to Cardiff, Derby and Sheffield, although fewer than Hull, Leicester and Southampton.

2.20 Employment in knowledge-based industries increased at a much slower rate than all comparator areas except Hull. Some City Centres, such as Leicester, Sheffield and Cardiff, grew substantially in this sector between 1996 and 2002. Swansea grew at 19% - faster than Southampton, Derby and Hull but less strongly than the rest.

Table 2.7 Knowledge-Based Industries Jobs

	City Centre 2003	Urban Area 2003	% of total concentrated in City Centre	% of whole in City Centre	% of whole in Urban Area	Change 96-02 City Centre	Change 96-02 Urban Area
Cardiff	13,706	40,087	*34%*	30%	20%	42%	17%
Derby	7,485	24,107	*31%*	15%	19%	11%	16%
Hull	10,001	19,026	*53%*	24%	12%	13%	10%
Leicester	16,586	32,152	*52%*	30%	15%	70%	13%
Plymouth	6,338	15,671	*40%*	21%	14%	28%	13%
Sheffield	13,338	43,354	*31%*	31%	14%	59%	12%
Southampton	18,760	35,387	*53%*	32%	21%	1%	21%
Swansea	4,861	14,462	*34%*	20%	11%	19%	9%

Source: Annual Business Inquiry, 2003

Population

2.21 Table 2.8 below shows the population numbers and change for the City Centres and Urban Areas between 1991 and 2001[4]. Cardiff and Leicester Urban Areas grew whereas Sheffield and Swansea stagnated, and Hull declined. In the City Centres, however, Leicester grew substantially – by 60% - and Cardiff by 42%. Swansea City Centre's population grew by the least – at just 5% (although this is faster than the Urban Area as a whole).

[3] This definition comprises: publishing and sound recordings, reproduction of recorded media, manufacture of pharmaceuticals etc, manufacture of office machinery /computers, manufacture of electric motors/generators etc, manufacture of electricity distribution etc, manufacture of accumulators etc, manufacture of electrical equipment nec, manufacture of electronic valves, manufacture of TV/radio transmitters etc, manufacture of TV/radio receivers etc, manufacture of medical/surgical equipment etc, manufacture of instruments for measuring, manufacture of optical instruments etc, manufacture of watches and clocks, manufacture of aircraft and spacecraft, telecommunications, accounting/bookkeeping activities etc, architectural/engineering activities etc, technical testing and analysis, advertising, labour recruitment etc, motion picture and video activities, radio and television activities, financial intermediation etc, insurance and pension funding etc, act auxiliary financial intermediation, computing and related activities, and research and development.

[4] We have excluded Derby, Southampton and Plymouth because they do not have wards from 1991 that correspond readily to the 2001 equivalents.

Table 2.8 Population and Change in the City Centres and Urban Areas

	City Centre			Urban Area		
	Pop 1991	Pop 2001	% change	Pop 1991	Pop 2001	% change
Cardiff	9,811	13,940	42%	320,128	341,383	7%
Hull	10,909	11,908	9%	330,192	288,350	-13%
Leicester	8,433	13,465	60%	444,622	474,924	7%
Sheffield	14,019	16,030	14%	697,612	688,111	-1%
Swansea	11,354	11,933	5%	289,131	285,554	-1%

Source: Census 1991, Census 2001

Dwellings

2.22 Using Census data, we have considered the numbers of dwellings that are in the City Centre of Swansea and the comparator areas. Again, we have excluded Derby, Southampton and Plymouth because we cannot compare City Centre areas readily over time.

2.23 Swansea has the highest proportion of dwellings in its City Centre- at 5.4%. This is slightly higher than Cardiff, Leicester and Sheffield. This has changed at a similar rate to Cardiff and Hull, faster than Sheffield, but much slower than Leicester.

Table 2.9 Dwellings, 2001

		Cardiff	Hull	Leicester	Sheffield	Swansea
2001	Urban Area	144,769	156,570	195,104	299,492	125,941
	City Centre	4,832	7,204	6,493	7,270	6,780
	%	3.3%	4.6%	3.3%	2.4%	5.4%
1991	Urban Area	125,492	132,481	169,862	286,053	113,747
	City Centre	4,102	5,611	3,965	7,011	5,367
	%	3.3%	4.2%	2.3%	2.5%	4.7%
1991-2001	Urban Area Change	19,277	24,089	25,242	13,439	12,194
	% change	15%	18%	15%	5%	11%
1991-2001	City Centre Change	730	1,593	2,528	259	1,413
	% change	18%	28%	64%	4%	26%

Source: Census 2001

Summary

- Swansea City Centre has a very low proportion of its jobs in its City Centre compared to the benchmark towns.
- Swansea City Centre is strongly under-represented in FBS employment – a sector which is already strongly under-represented in the whole Urban Area.
- Swansea City Centre has a reasonable proportion of its retail jobs in the City Centre, although this proportion has the potential to increase in line with other areas.
- Swansea is over-represented in public administration, education and health employment. However, compared to benchmark areas, relatively few of these jobs are concentrated in the City Centre.
- Swansea has an average proportion of employment in other services, and an average proportion of these are concentrated in the City Centre.
- A comparatively larger proportion of jobs in the City Centre are in hotels and restaurants. However, this reflects the lack of employment in other traditional City Centre sectors, e.g. FBS.

- Swansea is very poorly represented in knowledge-based industries. Of those that are in the Urban Area, comparatively few are concentrated in the City Centre.
- Swansea's population has grown steadily in the City Centre, although the Urban Area's population has stagnated.
- Dwellings numbers have increased in the City Centre, in line with most areas. It has a slightly higher proportion of dwellings in the City Centre than the benchmark areas.

ANNEX ONE

City Centre Wards

The following wards are used to proxy the City Centres in the benchmarking cities.

City	City Centre Ward Proxy 2003	City Centre Ward Proxy 1991
Swansea	Castle	Castle
Cardiff	Cathays	Cathays
Derby	Arboretum Alvaston	Litchurch
Kingston-Upon-Hull	Myton	Myton
Leicester	Castle	Castle
Plymouth	St. Peter and the Waterfront Sutton and Mount Gould	Sutton
Southampton	Freemantle Bargate Bevois	Bargate
Sheffield	Netherthorpe	Netherthorpe

Swansea City Centre: Strategic Framework

Technical Appendix 2

TRANSPORT AND INFRASTRUCTURE

ARUP

CONTENTS

1 TRANSPORT

Introduction

1.1 This Section sets out information about access to Swansea City Centre. Existing strategies are firstly referred to, and then the various transport modes are briefly outlined in terms of long distance and local transport. The Section concludes by highlighting the key issues and constraints for the Swansea City Centre strategic framework in terms of transport.

Policy Context/Existing Strategies

Swansea Local Transport Plan

1.2 The current Swansea Local Transport Plan (LTP) is for the period 2000-2005. Guidance from the Assembly is expected in Autumn 2005 on the preparation of the next LTPs which are likely to be regional documents. The Transport vision for Swansea set out in the current LTP is as follows:

"a transport system which meets the needs of all residents and visitors and which people feel is safe to use. A transport system which promotes economic growth, but also reduces the level of congestion and pollution."

City Centre Transport and Development Study 2002

Executive summary

1.3 The City and County of Swansea and the Welsh Development Agency commissioned Arup to undertake the Swansea City Centre Transport and Development Study. The study noted that the City, which is the regional centre for south west Wales, has been affected over a number of decades by changes to the structure of the economy and the Welsh Development Agency is working closely with the City and County of Swansea to promote economic development.

1.4 The primary objective of this Study was thus to determine ways in which the key developments in the City and the desire for integration can be achieved at the same time as meeting both national and local transport aspirations and air quality objectives.

1.5 A methodology was developed for the Study which makes best use of previous work and existing information, supported by locally conducted market research to obtain information on how local car users might be expected to respond to opportunities to change their mode of travel to the city centre. Use was made of an existing VISUM traffic model which has been developed and maintained by the City and County of Swansea. A new Travel Choice Model was then developed during the Study which takes account of conditions on seven main travel corridors which radiate out from the city centre.

1.6 The Travel Choice Model was used to forecast the proportion of trips by each transport mode under varying future conditions on each of the corridors considered. This enabled the impact of future land use developments and various transport improvements to be investigated and conclusions and recommendations for the future to be drawn.

1.7 Traffic congestion was identified as likely to occur at:

- Tawe Bridges
- Oystermouth Road between Sketty Lane and West Way to the west
- Pentrechwyth Road and Neath Road to the north

1.8 A number of initiatives were tested. These included:

- Provision of four Park and Ride facilities
- Introducing the principle of replacing some city centre parking provision (for instance when sites are developed) by peripheral Park and Walk facilities
- Provision of bus priority measures
- Quality bus service provision
- Network capacity improvements, including traffic management measures

1.9 The availability and cost of city centre parking was shown to be an important issue, and sensitivity tests showed that significant increases in city centre parking charges would be needed in order to achieve a modal shift away from car use. The Study also showed that increasing parking charges in the city centre would make long term parking on sites peripheral to the city centre more attractive, thus freeing up space for short term parking.

1.10 The analysis undertaken during the Study indicated that there is potential for a shift away from car use for journeys into the city centre. There would, nevertheless, be benefits to be obtained from improvements to network capacity.

Conclusion and Recommendations

1.11 The Study has considered the situation in Swansea in 2017 with proposed key developments in place and as forecast that many of the main travel corridors into the City would experience traffic congestion unless appropriate interventions were to be made to improve the transport systems. The Study accordingly developed a tool to investigate the likely impact of various transport interventions designed to improve the environment in Swansea city centre.

1.12 The initiative to implement Park & Ride facilities on the main approaches to the city centre, as proposed in the Local Transport Plan, was shown to have potential to encourage modal shift, provided that there is a complementary initiative to increase the cost of parking in the city centre- without this, the demand for Park & Ride has been seen to be limited. Park & Ride would also be more effective if it were supported by bus priority measures to improve the journey time to the city centre by bus relative to car journeys.

1.13 Market research suggested that there would be some support for the displacement of city centre parking provision to more peripheral sites (in order to reduce car movements in the city centre and to improve the environment for pedestrians), provided that these would be cheaper, and provided with pleasant, safe and secure pedestrian/ cycle routes to the city centre.

1.14 The potential for transfer from car to bus was seen to the limited. Local market research on this issue proved to be inconclusive, but the collective results of work elsewhere enabled relationships between car and bus use to be developed. These have suggested that increased parking charges would encourage some car users to transfer to bus, but that this transfer would be lower than the likely transfer to Park & Ride or peripheral Park & Walk facilities. In order to achieve significant transfer to bus from car, it would be necessary to introduce a quality bus approach which would need to combine the following:

- Modern user-friendly vehicles
- Bus priority measures
- Good waiting facilities
- Good passenger information

1.15 In addition to the introduction of bus priority, Park & Ride, Park & Walk and increased city centre parking charges, there would appear to be justification to consider traffic management measures further- in particular, the introduction of a gyratory system incorporating the Tawe bridges. It is also apparent that there would be accessibility benefits arising from increased road capacity to the north and, if possible, to the west.

Recommendations

1.16 The work of the Study has led to a number of suggestions for future work:

- An action plan for car parking should be drawn up. This should take account of the implementation of Park & Ride facilities and should be aimed at differential parking charges to encourage reduced use of the private car for journeys to the city centre. The Travel Choice Model should be used to conduct sensitivity tests to determine the impact on modal share on individual corridors of different pricing structures for short and long stay parking. The plan should identify possible sites for peripheral Park & Walk/Cycle facilities.
- Provision of specific bus priority measures along routes serving Park &Ride sites will be an important complementary measure to assist in encouraging modal shift away from city centre parking. In addition, further investigation is needed of bus priority measures associated with access to areas such as Kingsway, and especially linking High Street railway station to such areas.
- Further investigation is needed to determine what measures might be introduced on Oystermouth Road corridor to reduce traffic congestion and to facilitate pedestrian movements between the waterfront and the city centre.
- Detailed investigation is required of the feasibility of introducing a gyratory system across the rive Tawe. This should include detailed design, as well as further assessment of the operational aspects of the revised traffic management and consequent impact upon network capacity and potential for bus priority.
- The Travel Choice Model should be used to predict the likely impact of the proposed Hafod Bypass on conditions on the northern corridors. The potential for associated bus priority measures would need to be taken into account and the impact this might have upon the demand for use of the Llandore Park & Ride facility. Equally, the adverse affect of increased road capacity on traffic conditions in the city centre should be taken into account.
- Monitoring of modal share, including Park & Ride use, for journeys to the city centre would provide a useful indicator of travel trends and the effectiveness of the integrated transport measure adopted. A rolling programme of market research involving users and non-users of public transport would greatly inform the process of creating an enhanced, pedestrian friendly environment within the city.
- The feasibility of introducing a City Bike scheme (as currently widely used in Amsterdam and elsewhere in Europe) could be investigated, especially since Swansea is a tourist destination and the geography of the central area could lend itself to cycle use.
- Finally, this Study has shown that future developments in Swansea will result in increased demand for transport on all corridors into the city centre. Investment in transport improvements is, therefore, a fundamental requirement to ensure prosperity for the City.

City Centre Action Plan 2005-2006

1.17 The City Centre Action Plan has been prepared by the Swansea City Centre Partnership. The Action Plan 2005-2006 sets out six priorities, the third of which relates to transport as follows:

Priority 3 – Improved Transport and Public Accesses To improve transport and public access into and within the City Centre

1.18 Objectives:

- Enhance the appearance of gateways and approaches to the City Centre;
- Provide high quality, accessible and affordable parking within the City Centre;
- Encourage greater use of public transport; and
- Improve access into and within the City Centre for all.

1.19 Actions:

- Construct Phase 3 of the Express Bus Route linking the City Centre to Landore Park and Ride;
- Construct the Express Bus Route linking Fabian Way Park and Ride to the City Centre, together with a new 'gateway' bridge over Fabian Way;
- Develop a Park and Ride site on Carmarthen Road;
- Progress the redevelopment of the Quadrant Bus Station;
- Refurbish the Quadrant multi-storey car park;
- Prevent illegal access and parking through the installation of bollards, revision of Traffic Orders, enhanced enforcement and a campaign against illegal parking; and
- Improve access within the City Centre through the installation of additional tactile road crossings.

1.20 The 2005-2006 Action Plan also outlines the following transport and access achievements to date since the launch of the City Centre Partnership in 2001:

- £2 million invested in improvements to Fabian Way, the main approach to the City Centre from the east;
- Work completed on the transport interchange and environmental improvements at Swansea Railway Station;
- Establishment of year-round Park and Ride services at Landore and Fabian Way;
- City and County of Swansea – winner of the Welsh Transport Award 2005 "Local Authority (Policy and Planning)" category for the development of Park and Ride" category;
- Fabian Way Park and Ride – winner of the British Parking Award 2005 "Park & Ride" category;
- Funding secured and outline planning permission granted for the redevelopment of the Quadrant Bus Station;
- Variable Message Signing introduced for the multi-storey car parks;
- Refurbishment of the car parks in Park Street, Oxford Street and the Strand;
- Introduction of pay-on-foot at the Quadrant and St David's multi-storey car parks; and
- Swansea Shopmobility – the busiest Shopmobility scheme in Wales.

Long Distance Transport

Road

1.21 Access to Swansea city centre is well served from the M4 motorway, with junctions 42 – 47 all linking to the centre via radial routes, as follows:

- Junction 42 – Fabian Way, the A483;
- Junction 44 – the A48/A4217;
- Junction 45 – the A4067; and
- Junction 47 – the A483.

Rail

1.22 Swansea Railway Station, located on the northern perimeter of the City Centre on High Street, acts as the focal point for the rail network within South West Wales and offers good links to many major cities including Cardiff, Manchester, Birmingham, Bristol and London. Swansea is served by two Train Operating Companies – First Great Western (with nearly twenty services per weekday from London Paddington) and Arriva Trains Wales (with 14 trains from Cardiff, 19 trains from West Wales and 4 trains from Central Wales per weekday).

Coach

1.23 Coaches leave from the south side of the Quadrant Shopping Centre and link Swansea into the national coach network, with direct services to London, Birmingham, Heathrow, Gatwick and other parts of the UK.

Port

1.24 Swansea has a direct ferry link with Cork operated by Swansea-Cork Ferries, sailing 11 months a year (March to January). There is one crossing per day, with a sailing time of 10 hours. The Ferry Port is to the east of the city centre, in the SA1 development area.

Airport

1.25 Air Wales was operating services from Swansea Airport (at Fairwood Common on the Gower) to London, Dublin, Cork and Jersey but services ceased in October 2004. The Airport remains open to private aircraft and is able to accept most turbo-prop planes and smaller jets.

Local Transport

Car

1.26 There are over 7,000 off-street car park spaces in Swansea city centre, as follows:

- 3,947 Council operated – 487 short stay and 3,430 long stay (although short stays are generally permitted in the long stay car parks), plus 30 permit only. Typical charges are £0.90 per hour for short stay and £3.00 per day for long stay, although the long stay charge is likely to increase to £5.00 per day this year;
- 1,088 in NCP car parks (all long stay); and
- 2,319 in other privately controlled public car parks (e.g. supermarkets, Parc Tawe).

1.27 There are also 1,100 spaces in Park & Ride sites which serve the city centre. In addition, there are some 400 on-street spaces (which are generally limited to a maximum waiting time, but free of charge). As well as the publicly available car parking spaces there is a significant amount of private non-residential (PNR) spaces e.g. employer parking.

Park & Ride

1.28 Swansea now has two Park & Ride sites, one from the north at Landore (which opened in 2001) and one from the east at Fabian Way (which opened in 2003); each site has 550 parking spaces. There are proposals for a third Park & Ride site, from the West on Carmarthen Road, and aspirations for a fourth site from the south at Mumbles. The Park & Ride services operate Monday to Saturday (0645-1930) with bus services every 12 to 15 minutes. The charge is £1.50 to park a car all day and up to 4 people can travel into Swansea and back on the dedicated Park & Ride bus. Usage of the sites is increasing and is currently about 8,000 vehicles per month for the Landore site (with a peak of 16,000 last December) and 5,000 vehicles per month for the Fabian Way site (with a peak of 11,000 last December).

Rail

1.29 Local railway stations are limited to those at Gowerton and Llansamlet, to the northwest and northeast of the city respectively. Both stations are served by Arriva Trains Wales services, with 11 trains per day calling at Gowerton and 8 trains per day calling at Llansamlet, providing connections to South West Wales and Cardiff as well as to the city centre.

Bus

1.30 First Group bus network links the city centre (where the main waiting locations are Kingsway and the Quadrant Bus Station) to the outlying areas. There is a high frequency service between the railway station and the bus station (as part of general bus service routes). There are plans to redevelop the Quadrant Bus Station, retaining its use as a bus station with upgraded facilities for passengers (to be implemented by 2007/8). Swansea Council is also currently investigating implementation of a rapid bus transit system along the Morriston – City Centre – Mumbles corridor. The bus system (termed 'ftr') is being developed in partnership with First Group and will involve significant changes to city centre traffic patterns. In particular a one-way system around Kingsway – Christina Street – Mansell Street – Orchard Street is proposed, in order to accommodate a two-way Busway on Kingsway. The 'ftr' project will significantly improve the accessibility of the city cente from areas to the north and west of the city.

Community Transport

1.31 There are four community transport schemes (in Swansea, Gower, Pontarddulais and District and Gorseinon). Two wheelchair accessible cars are owned by two of the schemes and these complement the use of volunteers' own cars. None of the schemes currently provides minibuses. Passengers are eligible to use a scheme if they are elderly or have restricted mobility and cannot make the journey by any other means.

Taxis

1.32 Hackney carriage and private hire services operate to and from the city centre. There are a number of taxi ranks within the city centre, a proportion of which only operate from late in the evening.

Cycling

1.33 The Celtic Trail (National Cycle Network Route 4) passes through Swansea from east to west. The section of the trail that runs along the Promenade is the most heavily used cycle path in Wales. Swansea also links into the National Cycle Network (Route 43) to Builth Wells. Within the City Centre parking provision for 236 bikes has been made via cycle racks spread over 29 sites. As part of the re-development of Swansea Point, a new river crossing and an upgraded section of promenade are to be constructed.

Walking

1.34 There is a number of pedestrianised areas within the city centre and work is underway to improve pedestrian facilities on Princess Way to improve pedestrian links between the city centre and the Marina and Museum areas. Pedestrian survey counts for Swansea's central shopping area are available for the period 1985-2004. The main concentrations of pedestrian activity within the city centre are focused on the Quadrant and Oxford Street (about 125,000 people per week). Overall however the survey findings suggest that there has been a net reduction in the number of pedestrians in the city centre over the last twenty years.

Shopmobility

1.35 The Swansea Shopmobility scheme, now managed by the City Centre Partnership, opened in December 1997. The service provides scooters and wheelchairs to help people with permanent or temporary mobility difficulties to access the City Centre. Since its opening there has been continuing and significant growth both in terms of membership and the usage of equipment. The Swansea Shopmobility scheme is now the busiest such scheme in Wales.

Tourist Transport

1.36 An off-road land train (called the Swansea Bay Rider) operates at weekends and bank holidays in May and June between St Helen's and Mumbles on the route of the foreshore cycleway / pedestrian walkway.

Management Issues

Information

1.37 The City & County of Swansea website contains comprehensive travel information, together with links to other relevant websites. More generally Traveline Cymru provides times and routes of all bus, coach, rail, ferry and air services in Wales.

Travel Plans

1.38 The City & County of Swansea is actively promoting Travel Plans. There is a car-share scheme for South West Wales called swwitch2share.com.

VMS

1.39 Variable Message Signing has recently been introduced for the multi-storey car parks to advise motorists on the availability of spaces.

Modal split

1.40 Modal split information for May to October 2004 is available from the City Centre User Survey. This gives the following modal split information for the City Centre:

- 52% private car;
- 25% bus;
- 16% walk;
- 3% train; and
- 2% Park & Ride.

Cycle access was negligible. In terms of accessibility, the majority of respondents (87%) stated that they found access to the City Centre either 'very' or 'fairly' easy.

Travel to work

1.41 Figures for the City and County as a whole reveal that 102,100 people normally work within the area, with 16,500 commuting out of the area and 23,100 commuting in – a net inflow of 6,600 people. This net inflow is the third highest in Wales, after Cardiff (46,800 net inflow) and Newport (10,100 net inflow).

Traffic Flows: AM Inbound Movements (0800 - 0900)

	Total Cars (Buses)	Car Person Trips	Bus Person Trips
A4067 Mumbles Road (St Helens)	1830 (14)	2067 (93.4%)	147 (6.6%)
A484 Carmarthen Road (Dyfatty Street)	1193 (31)	1585 (69.8%)	687 (30.2%)
A483 Fabian Way (Tawe Bridges)	1207 (16)	1458 (86.7%)	224 (13.3%)
A4217 Pentreguinea Road (Maesteg Street)	982 (9)	1248 (90.4%)	132 (9.6%)
A4118 Gower Road (Walter Road/St James Crescent)	894 (13)	1127 (86.3%)	179 (13.7%)
B4603 Neath Road (Jersey Street)	530 (19)	683 (68.5%)	314 (31.5%)
B4489 Llangyfelach Road (St Josephs)	714 (3)	972 (96.1%)	39 (3.9%)

PM Outbound Movements (1700 - 1800)

	Total Cars (Buses)	Car Person Trips	Bus Person Trips
A4067 Mumbles Road (St Helens)	1890 (22)	2393 (87.2%)	350 (12.8%)
A484 Carmarthen Road (Dyfatty Street)	1186 (24)	1809 (77.2%)	534 (22.8%)
A483 Fabian Way (Tawe Bridges)	1090 (15)	1525 (86.5%)	239 (13.5%)
A4217 Pentreguinea Road (Maesteg Street)	914 (11)	1331 (92.4%)	110 (7.6%)
A4118 Gower Road (Walter Road/St James Crescent)	754 (12)	996 (78.1%)	279 (21.9%)
B4603 Neath Road (Jersey Street)	594 (17)	903 (70.8%)	372 (29.2%)
B4489 Llangyfelach Road (St Josephs)	563 (5)	693 (93.4%)	49 (6.6%)

The results of the above surveys would appear to support the perception of Swansea as being a car dominated city, with a bus mode share significantly lower than that achieved in Cardiff, for example.

Highway Underpass Proposal

1.42 Victoria Road/Oystermouth Road (A4067) separates the City Centre from the Waterfront area, and acts as a 'barrier' to pedestrian movement between the two areas. Signalised pedestrian crossings do exist at a number of places.

1.43 In the past there have been a number of proposals to locate the A4067 into a tunnel some 300m long to enable direct connection between the City Centre and Waterfront and also create a new attractive urban environment and potentially valuable development area. However, the disadvantages mainly concerning the disruption and cost of the tunnel works have resulted in this proposal being shelved. Applications have been made for Lottery Funding but were rejected due to the significant proportion of the cost being allocated to the highway infrastructure.

1.44 Only preliminary details have been prepared and, therefore, the cost estimates must be viewed as 'ballpark'. Also further development has occurred in the area which would require amendments to the proposals resulting in further cost increases.

1.45 In summary the disadvantages of the construction are as follows:-

- Disruption to the area with regard to highway, pedestrian and cycle use.
- A need for temporary traffic diversions on an already busy highway. The minor works carried out for the National Waterfront Museum, Swansea caused lengthy traffic queues. Also, the temporary diversion route westbound which was proposed in the Lottery Funding Application cannot now be used due to the construction of the National Waterfront Museum, Swansea.
- There would be considerable noise and dust generated from the works.
- There would be impact on adjacent structures and buildings and, therefore, temporary and/or permanent support works are likely to be necessary.
- There are significant statutory services and drainage within the proposed tunnel area which would have to be diverted, abandoned or protected. These involve major works.

1.46 The programme for the construction is estimated at around 6 years from commencement of design to completion of the tunnel construction and top slab for development. The design/approvals period would be around 2 years with 2½ years for tunnel construction and 1½ years for top slab/development area construction.

1.47 The obvious advantage of creating this area is to provide a much improved link between the Waterfront and the City Centre and valuable development area. It also provides a better integrated transport solution although there is only minor benefit in pure highway terms, due to removal of interruptions from pedestrians crossing. It is questionable however, whether these advantages are sufficient to justify the expenditure on the tunnel construction and associated works. From previous work the range of cost for the engineering works is likely to be £25-£30 million.

1.48 During previous design work we have gathered information on the constraints and more detail of the necessary engineering works. This can be provided if required.

Key Issues

Topography/ geography

1.49 Probably the main constraint for transport in Swansea city centre is the geography and topography of the area, namely the impact of the coastline in terms of the development of the city centre (preventing a radial development) and the hilly nature of the terrain inland.

City Centre pedestrian environments and links to waterfront

1.50 One of the key problems in Swansea is that the city centre is not regarded as being pedestrian or cycle friendly, and the barrier to movement between the city centre and the waterfront area created by Oystermouth Road. While there is some traffic congestion, this is generally not significant, although matters such as congestion are of course relative and some might regard the congestion as a problem. There is a perception that Swansea is car dominated, and the Council would like to see the modal split by bus increase.

Car Parking in Swansea

Table 1.3: City Centre Car Parks

	No.	Name		Total	
Surface	1	Park Street East		31	Short-stay only
	2	Park Street West		23	Disabled only
	3	Picton Lane		42	Short-stay only
	4	Pell Street		30	Short-stay only
	5	Northampton Lane		84	Short-stay only
	6	Worcester Place		21	Short-stay only
	7	Princess Street (Grand Theatre)		123	Short-stay only
	8	YMCA		25	Short-stay only
	9	Salubrious Place		26	Permit holders
	10	Oxford Street		116	Short-stay only
	11	Mariner Street		164	
	12	Paxton Street		331	
	13	East Burrows Road		230	
	14	Trawler Road		200	
	15	Pockets Wharf		53	
	16	Post Office (Strand)		218	
	17	Clarence Terrace		77	
			Total	1,768	
Multi-storey	**No.**	**Name**		**Total**	
	1	Quadrant Multi-storey		569	Council
	2	St David's Multi-storey		489	Council
	3	High Street Multi-storey		742	Council
	4	Kingsway Multi-storey		320	NCP
	5	Orchard Street Multi-storey		512	NCP
	6	Salubrious Place Multi-storey		256	NCP
			Total	2,632	
Retail	**No.**	**Name**		**Total**	
	1	Tesco		486	
	2	Parc Tawe (S)		870	
	3	Parc Tawe (N)		418	
	4	Sainsbury's		551	
			Total	2,325	
Park & Ride	**No.**	**Name**		**Total**	
	1	Landore		550	
	2	Fabian Way		550	
			Total	1,100	

Table 1.4: Other City Centre Car Parking Supply				
City	**Population**	**City Centre Car Park Spaces**	**Park & Ride**	**Total car park spaces**
Exeter	111,000	8,800	2,.000	10,800
Plymouth	240,000	4,200	1,600	5,800
Aberdeen	212,000	7,500	1,800	9,300
Swansea	225,000	6,900	1,100	8,000

Parking enforcement

1.51 On-street parking enforcement is currently undertaken by Police Traffic Wardens, but this is not regarded as a core police activity. There is potential for the Council to take over responsibility for on-street enforcement from the police by applying to decriminalise parking enforcement. This would help to support transport initiatives in the city centre such as the provision of bus stops and lanes, cycle lanes, taxi ranks, pedestrianised areas, limited waiting parking and parking provision for disabled people.

2 INFRASTRUCTURE AND SITE ISSUES

Introduction

2.1 The efficient use of utilities and drainage infrastructure will play an important part in successfully delivering the Development Strategy. The proposals to redevelop Swansea City Centre will increase demands on the existing infrastructure and strategic amendments may be necessary to efficiently service development proposals. This Technical Appendix describes the strategic level infrastructure requirements before focusing on the Priority Sites within the City Centre. Reference to flooding and existing ground conditions in the development context is also examined throughout this Appendix.

Strategic Considerations

Flooding

2.2 The TAN15 Development Advice Map (DAM) shows Zone C2 (areas without significant flood infrastructure) extending across a significant part of Swansea City Centre. Under TAN15 no residential development is allowed within Zone C2, but other development can be accepted subject to an application of justification test. There are potentially problems with residential development planned for the Sailbridge site and, subject to EA agreement, residential development on this site will probably not be permitted unless it can be demonstrated the site is not within the extreme flood plain. This would need to be assessed upon completion of the flood study and addressed in a Flooding Consequences Assessment (FCA).

Contamination and Ground Investigation

2.3 The Priority Sites are generally located in and around Swansea docks. This area has a rich industrial heritage and since the early to mid 19th Century the area has housed residential development alongside heavy industry. Numerous potentially contaminated industries have been located in the various development areas, including a gas works, timber and saw mills, mineral ore storage, ship building yards, patent fuel works, railway sidings and service areas and road transport depots. However, the majority of the areas have been redeveloped during the 1970's and 1980's and little evidence of these heavy, contaminative industries remain.

2.4 It is anticipated that much of the heavier contamination associated with the past land use would have been remediated as part of the redevelopment works of the 1970's and 1980's. However, the quality and extent of the remedial works is not known and was likely limited to either off-site disposal or on-site burial.

2.5 The awareness and appreciation of the effect of contaminated land on proposed developments has increased considerably since the sites were last redeveloped and there is a significant risk that any residual contamination at the sites exceeds the requirements of current standards and guidelines in relation to contaminated land.

2.6 As a minimum, the following studies and investigations will be required prior to redevelopment of the sites within Swansea City Centre:

- A review of past land uses
- A review of previous ground investigations
- A review of any remedial works undertaken in the past
- A ground investigation to provide visual inspection and laboratory testing of potentially contaminated soils and groundwater

- The preparation of environmental and human health risk assessments for the proposed developments

2.7 In addition to contamination investigations, a site wide desk study and ground investigation will be required for each of the development areas to establish ground conditions and geotechnical constraints for the development. These studies could be combined in a single piece of work.

Sustainability

2.8 Sustainability can be achieved in a variety of ways and the use of energy-saving technologies such as solar hot water collection, rainwater harvesting and natural ventilation will go a long way in achieving sustainable development. However, the inclusion of any of these technologies must only be considered if their application is wholly appropriate. There is potential to reduce the energy consumption of buildings and this will help to free up capacity within the existing utilities infrastructure, which will benefit further development of the City Centre. All new buildings should strive to achieve BREEAM ratings that are a minimum of VERY GOOD to ensure that they are as sustainable as possible.

2.9 A holistic approach to the development sites, considering them together, is the key to providing sustainable development. Proposals for the sites should not be considered in isolation but rather as a series of inter-connected sites that need strategic links. Transportation upgrades and linkages are planned and the effects of these upgrades need to be assessed for the wider Swansea area rather than just the immediate site area.

2.10 Drainage of the sites is a key issue with the existing drainage infrastructure being of a combined nature. Combined systems are unsustainable, because they can be quickly overloaded in storm events, allowing sewage to be spilled to watercourses frequently. Most combined systems are old and at capacity. The development of sites that contribute surface water to these systems offers the opportunity to remove surface water. This is something that DCWW will almost certainly require in order for foul flows to be discharged back into the system.

2.11 The potential to implement Sustainable Drainage Systems (SuDS) for managing surface water runoff from the proposed development sites is limited, due to a lack of space. Also, the proximity of the marina and River Tawe to the sites means that surface water could be collected and discharged here probably without the need for much attenuation. However, if the EA impose discharge limitations, storage will have to be considered. The most likely form of storage for the sites would be in underground tanks as there is limited space at the surface. However, Paxton Street offers the opportunity to incorporate features such as an attenuation basin into the landscaping that can be used to control discharges or even allow infiltration where ground conditions are suitable.

2.12 The application of TAN 15 to the sites in relation to flooding will also help ensure that the development sites are sustainable and not at risk from flooding.

Utilities and Drainage Infrastructure

2.13 All of the relevant utility and drainage suppliers have been consulted with regard to the development proposals. All of the sites are already well serviced, with the exception of Paxton Street, which is undeveloped but is adjacent to the Oystermouth Road corridor that carries much of Swansea's primary infrastructure. Existing drainage and utilities infrastructure is extensive within the City Centre, and although it is likely that reinforcement of off-site utilities will be minimal to support the increased loads, Western Power Distribution have confirmed that strategic changes will need to be made to the electrical supply infrastructure within the City Centre.

Electricity

2.14 In order to efficiently service the City Centre, a new primary (33/11kV) sub station will be required, within a timetable to be established against the pace of development. It should preferably be centrally located but the exact location will need to be determined. To accommodate this, an area of land comprising approximately 40m x 40m will need to be set aside. If this cannot be located centrally, the amount of mains infrastructure is likely to increase as transmission losses will be higher.

Sewerage

2.15 The sewerage network in the City Centre is generally of a combined (foul and storm) type. The main sewers generally fall southwards with the topography of the area and collect in the 1650mm diameter sewer in Oystermouth/Victoria Road. This main sewer then follows Adelaide Street, Pier Street and discharges to the pumping station in East Burrows Road. The foul water is then directed towards the wastewater treatment works off Fabian Way via a network of pumping mains and gravity sewers in Langdon Road (to the east of River Tawe).

2.16 A storm sewer (culverted watercourse) does exist from the City Centre and is located in York Street, Victoria Road and Somerset Place before discharging its contents into the River Tawe.

2.17 The redevelopment of the City Centre will need to address the requirements of DCWW. Surface water from new development is no longer permitted to be drained into combined systems and new surface water infrastructure will need to be provided to keep flows separate. DCWW have indicated that if surface water can be removed from the existing combined systems, there should be enough capacity to receive the foul flows from the redevelopment sites without having to reinforce any of the existing infrastructure. The net increase in foul flows associated with the redevelopment will be offset by the removal of surface waters from the existing systems.

Water Supply

2.18 The City Centre is supplied from the Water Treatment Works at Felindre which is located approximately 10 miles to the north. Source water for the treatment works comes from the Llyn Brianne Reservoir. From here it is released into the River Towy then abstracted some 40 miles downstream. The water is then transferred via a system of pumps to the Lower Lliw Reservoir, a further 17 miles away. The water is finally pumped the remaining one mile to the Felindre Water Treatment Works, where it is treated and enters the drinking water distribution system. The Treatment Works were opened in October 2001.

2.19 The City Centre has a good network coverage of water mains in its streets and highways.

Telecommunications

2.20 The City Centre is well served by BT plant due to the proximity of the BT Tower Exchange in the Strand. Broadband (ADSL) technology is available from the Swansea Main telephone exchange and high speed ‘always on’ broadband internet access will soon be available. Enquiries for each individual phone number can be done on the BT website.

Gas

2.21 Gas is directed to the City Centre from the High Pressure Reduction Station (PRS) at Waunarlwydd. A 12”/300mm diameter Intermediate Pressure Main takes the gas south, and then east along Mumbles Road, Oystermouth Road and Victoria Road (all A4067). The PRS at the Tesco Superstore, Oystermouth Road outputs the gas in low pressure mains to the streets and roads within the City Centre. The largest low pressure gas mains are 18” in diameter and are located within Oystermouth Road, Victoria Road and the Strand.

Electricity

2.22 Electricity is transmitted to the City Centre from the 132kV substation located in the Port Tennant area (to the north of Fabian Way and the SA1 development). 33kV (Extra High Voltage) cables supply the primary substations at Gething Street and the Strand. These primary substations output 11kV (High Voltage) power to smaller substations around the City Centre, which output power at 240V or 415V (Low Voltage) for use by domestic and commercial residents/tenants.

Priority Sites

Introduction

2.23 The following sections set out the requirements for the individual Priority Sites with regard to drainage, utilities ground conditions and any other general civil engineering issues. Only those sites with significant infrastructure requirements are described.

St David's and East Car Park

Utilities

2.24 The St David's site is already developed and well served by utilities infrastructure. However, to accommodate the Development Strategy for the whole of Swansea City Centre it is possible that a new primary electrical sub-station will have to be located in or adjacent to this area as this is the most central site within the City Centre. The area required for such a facility is approximately 40m x 40m.

2.25 It has been confirmed by the statutory undertakers that gas, mains water and BT connections can be made into existing infrastructure within or close to the site boundary without the need for reinforcement.

Drainage

2.26 The drainage system in this are is of a combined nature and is the responsibility of Dwr Cymru Welsh Water (DCWW). DCWW have advised that foul flows from the redeveloped area could be accepted into the existing system, provided that surface water is taken out of the combined system to free up capacity and collected in a separate system. Therefore a new surface water drainage system will be required, which could either discharge to the marina or to the existing culverted watercourse in York Street. The former could be disruptive but could be incorporated into the proposed Oystermouth Road improvements, finally discharging to the marina.

2.27 Discussions with the Environment Agency (EA) will be required to confirm the allowable discharge rate to either the marina or the culverted watercourse. Any limits on this will drive the design of any on-site attenuation. If on-site attenuation is required it is probably best accommodated in underground tanks at this site to maximise the development space available in the heart of the City Centre.

Ground Conditions

2.28 This site was formerly occupied by a large gas works site, as well as timber and saw mills, and areas of residential housing, which was located to the north of the former railway sidings and storage sheds associated with Swansea South Dock. The site was subsequently redeveloped to its current use as a supermarket, car parking and commercial use.

2.29 Arup were employed as the engineers for the National Waterfront Museum, which is located to the south of the site. The geotechnical report for the site describes ground conditions of up to 2m of made ground comprising granular slag and clinker deposits, underlain by up to 4m of loose to medium dense blown sand, 1.5m of peat and up to 4m of alluvial clay. These deposits were underlain by up to 15m of dense granular glacial deposits. It is anticipated that similar ground conditions exist in the south of the proposed development areas, however, a reduction in thickness of the compressible near surface deposits may be anticipated with increasing distance from the coastline.

2.30 Foundation types for the development will be dictated by the thickness of the made ground and the compressible blown sand, peat and alluvium, as well as the proposed structural loadings and tolerable total and differential settlements.

2.31 Buried obstructions, including tanks, may be present from the former gas works and industrial buildings. The extent of the remediation of the gas works prior to previous redevelopment of the site is not known at this stage, however residual contamination may be anticipated.

Parc Tawe

Utilities

2.32 The Parc Tawe site is well served by existing utilities infrastructure and no significant problems are envisaged. Connections to existing gas, mains water and BT supplies have been confirmed by the relevant statutory undertakers but electrical connections will depend on the exact requirements associated with a new primary sub-station located (preferably) within the St David's site as new primary infrastructure routes may be identified by Western Power Distribution.

2.33 No significant diversions should be required to facilitate the redevelopment of the Parc Tawe site but the proposed realignment of New Cut Road means that utilities should be routed along the new road corridor where possible.

Drainage

2.34 The existing DCWW drainage at Parc Tawe is a combined system with no designated storm drainage infrastructure. Storm drainage currently discharges to the combined system. DCWW have confirmed that storm drainage from the proposed development will not be allowed to discharge to the combined system if capacity is to be made available for foul water discharge. This should not present too much of a problem as storm drainage could be collected separately and discharged to the adjacent River Tawe. Permission to do this will need to be sought from the EA, who will advise on a discharge limit, potentially dictating on-site storage requirements. If there are problems in discharging to the Tawe, DCWW would be prepared to consider receiving storm water in the combined system, subject to existing capacity and an assessment of areas currently draining into this system. They would, however, not accept an increase in area draining to the system.

2.35 The proposed development actually reduces the amount of hard surfacing with car parking located underground. However, there is likely to be some storm drainage required within the underground car park to drain ramps, open stairwells etc. Depending on final levels, there may be a need to pump this drainage up into the main system and this should be recognised as maintenance of any pumping equipment will need to be considered.

Ground Conditions

2.36 The Parc Tawe site was redeveloped to its current layout during the late 1980's. Ove Arup and Partners acted as engineers for the development and information on the ground conditions and site history has been obtained from a geotechnical report prepared in 1987.

2.37 The site is centred on the former Swansea North Dock, with its associated dock industries which included numerous warehouses, mineral ore wharves, ship building yards and a patent fuel works. The North Dock was infilled in the late 1950's, and the site was then used as a road transport depot. Much of the dock was infilled with end-tipped rubble from demolished buildings in the surrounding area; no dredging was carried out prior to infilling. The ground condition at the site are summarised as follows:

Infilled Dock		East & West of Dock	
Thickness (m)	Description	Thickness (m)	Description
6.5 - 11	Loose gravel and cobbles of brick and masonry (Dock Infill)	3.5 - 7	Loose to medium dense clayey gravely sand with occasional soft clay pockets (Fill
0.5 - 3	Very soft clay, silt and coal (dock sediment)	2.5 - 4.5	Very soft silty clay (alluvium)
0.0 - 2.5	Loose sands with soft clay horizons (alluvium)	1.5 - 2.5	Loose silty sand (alluvium)
15 (max proven)	Medium dense to dense sand, gravels and cobbles (Glacial)	16 (max proven)	Medium dense to dense sand, gravels and cobbles (Glacial)
Bedrock comprises the Carboniferous aged Middle Coal Measures, however, the northern part of the site is underlain by the Tormynydd Coal seam and some investigation will be required to determine if any shallow mine workings are present.			

2.38 Existing foundations at the site are as follows:

- Dynamic compaction of the made ground was carried out throughout the site
- Hothouse/Restaurant – piled foundations
- Retail and Leisure units – pad footings or lightly reinforced rafts
- Pedestrian footbridge – piled foundations

2.39 Due to the thick horizon of made ground at the site, and the presence of an underlying horizon of soft clay, foundations for the proposed development will be largely dictated by the proposed structural loads. Lightly loaded low rise structures up to 100kN/m² may be founded upon shallow pad or rafted foundations, however, greater structural loads, or any structures particularly sensitive to differential movements, are likely to require deep foundations such as piles or stone columns. Depending on building footprints and proposed loads, there may be a possibility for re-using existing piled foundations, following suitable investigations to determine the integrity and condition of the piles.

2.40 Buried obstructions will be present in the ground from the numerous phases of development of the site, the most significant of which are likely to be the old dock structures. The treatment of these obstructions will be dependant on the proposed foundation solution and basement construction, and will vary between avoidance, removal, lowering, or local pre-drilling.

Paxton Street

Utilities

2.41 The Paxton Street site is well served by the existing utilities infrastructure in Oystermouth Road and no significant problems have been identified from utility suppliers' responses to our initial enquiries. Connections will have to be brought onto the site from the primary infrastructure within Oystermouth Road as the site is currently undeveloped.

Drainage

2.42 Existing DCWW drainage infrastructure in this area is of the combined type, draining foul and storm water from adjacent developments. A 12-inch diameter sewer crosses the site, running south to north under the proposed location of the hotel and connecting into the 12-inch diameter combined system in Oystermouth Road. This could present a problem as DCWW will not accept a structure of this nature being constructed over the sewer and its easement. DCWW have advised that the easement associated with this sewer is likely to be 6m total; 3m either side of its centreline. If the hotel location is not flexible, the sewer will have to be diverted around the perimeter of the site and procured through DCWW. There is capacity within the foul drainage system to accept flows from this site.

2.43 DCWW have confirmed that they are unlikely to accept storm water discharges into their combined system as the area is currently undeveloped. If ground conditions are suitable, an infiltration solution, such as a wetland or pond could be incorporated in the landscaping to collect surface water. The large tidal range means that an outfall onto the beach would need to be carefully considered as discharges at low tide would mean water running onto the beach, which may be unacceptable. Any outfall would either need to be above the high tide level, or incorporate a flap valve below the high tide level. Additional storage would also be required if the outfall could be surcharged by the tide, which could take the form of underground storage tank(s) or a basin.

Tidal Pool

2.44 The feasibility of the proposed tidal pool at the waterfront is difficult to assess without site levels to compare to tide levels. However, there are certain principles that need to be considered:

- The level of the pool sill should be such that the pool receives 'fresh' seawater at every high tide to prevent stagnation of the water. Given the difference between Spring Tide (8.5m) and Neap Tide (4.1m) mean ranges for Swansea, this will be difficult to achieve
- A means of draining the pool should be incorporated into the design

2.45 To further assess the feasibility of the pool, site levels will be required to be considered with tide levels. A decision should be made on whether it should be designed to 'flush' at every high tide, or whether Neaps can be ignored.

Ground Conditions

2.46 The site is currently occupied by ground level car parks. Historical maps show that the southern part of the site housed industrial works and railway sidings associated with the Swansea South Dock. The central and northern site area was occupied by residential housing.

2.47 The published geology at the site is shown to comprise blown sand overlying glacial boulder clay and Middle Coal Measures bedrock; however, no coal seams are present at shallow depth below the site.

2.48 Ground conditions at the National Waterfront Museum, to the east of the site, comprise a sequence up to 8m thick of loose to medium dense blown sand, peat and soft alluvial clay. It is likely that these deposits also underlie this site; however, thicker sequences of compressible strata may be encountered given the sites close proximity to the coast.

It is possible that lightly loaded, low rise structures may be founded on shallow foundations in the loose to medium dense sand. However this would be dependant on acceptable settlement, in particular differential movements. Foundation requirements for medium to high rise buildings are likely to include deep foundations such as piles or stone columns. Some buried obstructions may be encountered associated with the former industrial buildings at the site and to a lesser degree by the former residential housing.

Sailbridge Site

Utilities

2.49 The Sailbridge site is well served with existing utilities infrastructure and the statutory undertakers have confirmed that gas, electric, mains water and BT connections can be made available from the existing networks. However, the electrical supply to the site is now subject to the wider strategic requirements of WPD and the need for a new primary sub-station.

2.50 Local diversion of a 4-inch water main may be required to facilitate the proposed development on this site, but this is not considered a significant constraint.

Drainage

2.51 The existing public sewerage system is of a combined type at this site and DCWW have confirmed that foul flows from the proposed development can be accommodated in the existing system. Surface water will not be permitted to discharge to this system and a separate system will have to be provided to discharge these flows to the marina.

2.52 Several public sewers cross the site and development would not be permitted within their easements. To maximise the development, these sewers will need to be diverted around the perimeter of the site, which is likely to be costly and should be procured by DCWW.

2.53 A Sewage Pumping Station is located at the western boundary of the site and no development will be permitted within 15m of its compound. This should, however, not be a significant constraint but pipes feeding it will require diversion as stated above.

Ground Conditions

2.54 This site is located to the south of the former Swansea North Dock, and is underlain by numerous former dock structures including the half-tide basin, a graving dock and two dry docks. The eastern site boundary is adjacent to the River Tawe and no details have currently been made available as to the type and construction of the retaining wall. A supermarket is currently located on the central site area, with the majority of the proposed development area to the north and south occupied by car parking.

2.55 The published geology at the site is shown to comprise blown sand and alluvium overlying glacial boulder clay and Middle Coal Measures bedrock, however no shallow coal seams are shown in the site area. A ground investigation at Pocketts Wharf; directly south east of the proposed development area encountered between 4.5m and 9m of fill comprising predominantly loose ashy sand with clayey horizons and bitumen, gravels, brick and timber also present; the deeper fill associated with infilled basins. The fill was underlain by up to 15m of dense to very dense glacial sands, gravels and cobbles, no bedrock was proven.

2.56 Foundation requirements at the site will be dependant on the proposed loads. Light, loaded, low rise buildings may be suitable for construction on shallow foundations, although some ground improvement is likely to be required and differential settlement may be an issue if the building footprints straddle infilled basins. Medium to high loaded buildings are likely to require deep foundations.

2.57 Buried obstructions will be present in the ground from the numerous phases of development at the site, the most significant of which are likely to be the old dock structures. The treatment of these, or other, obstructions will be dependant on the proposed foundation solution and basement construction, and will vary between avoidance, removal, lowering, or local pre-drilling.

3 OYSTERMOUTH ROAD: BOULEVARD CONCEPT

Introduction

3.1 A Framework for future development of Swansea City Centre has been developed. Included in the Framework are a number of recommendations for transport accessibility, one of which relates to creating a European Boulevard on Oystermouth Road / Victoria Road (see Figure 1). This Technical Note seeks to provide an outline approach to improving Oystermouth Road to achieve this vision.

Transport Analysis

3.2 Through traffic is a significant cause of congestion. However, there are few alternative routes for traffic with origins or destinations close to the City Centre. The Oystermouth Road corridor currently provides the main conduit for through-traffic. Its dual carriageway layout and direct alignment makes it the most suitable road to act as the principal east-west artery – and it should continue to do so. However, its operation as a road corridor and pedestrian barrier merits specific consideration, as it has a significant effect on accessibility to the south-eastern areas of the City Centre.

3.3 If traffic was relocated away from Oystermouth Road, for example to West Way / Kingsway and linked through to Tawe Bridges via Parc Tawe, the problem of severance would simply be transferred to this corridor. Instead, the transport strategy has been developed on the principle that traffic should be better managed on Oystermouth Road / Victoria Road, with measures to reduce the actual and perceived severance between the city centre and the waterfront.

3.4 Particular weaknesses associated with Oystermouth Road are identified as follows:

- **Pedestrian links to the Maritime Quarter, the waterfront and SA1 Swansea Waterfront:** Facilities for pedestrian movement on the edge of the Oystermouth Road / Kingsway / West Way 'box' are poor, particularly at road crossings, but with high quality routes thereafter, such as to SA1 Swansea Waterfront and along the foreshore. The Oystermouth Road corridor is traffic dominated, which supports the perception that pedestrians are given very little priority
- **Cycle links to foreshore route:** Cycle access between the City Centre and the foreshore route is poor due to the barrier created by Oystermouth Road
- **Pedestrian and cycling environment along Oystermouth Road:** The environment for walking or cycling along Oystermouth Road is poor, which further erodes the linkages between the waterfront and the City Centre.

3.5 However, key locations where pedestrians enter the core area are of poor quality and are environmentally unattractive. Crossings at the edge of the City Centre road system (Oystermouth Road / Victoria Road, Kingsway, Westway) are either via subway or overbridge, or via low capacity, at-grade, signal-controlled, staggered pedestrian crossings. Links into other surrounding areas like Parc Tawe, High Street and adjacent residential areas exhibit similar characteristics. Recent improvements have been made to the pedestrian routes to the Maritime Quarter, in particular along Princess Way, and at the new river crossing to SA1 Swansea Waterfront (the Sail Bridge), but there is scope for more widespread improvement.

Regeneration Framework

3.6 One of the priorities identified in the Regeneration Framework is "Creating a High Quality "European Boulevard" by changing the perception, experience and environment of the Oystermouth Road, Victoria Road and Quay Parade corridor, in order to “cross the divide” between the City and its waterfront. Whilst currently viewed as a busy east-west through road, it has the real potential to become a unique and interesting urban street, which although still used by traffic, will become a vitally important link between the City Centre, the sea and the River Tawe. This can be achieved by enlarging the City Centre Core to include land south of Oystermouth Road, thereby transforming a sterile road corridor into an exciting “European Boulevard”. Whilst achieving an effective balance between vehicular and pedestrian movement particularly at key crossing points, such a boulevard would be enclosed by buildings with active frontages of high architectural design quality, and excellent public realm and landscape.

Accessibility Strategy

3.7 In support of the Regeneration Framework, at the heart of the accessibility strategy is the proposal that Oystermouth Road/Victoria Road / Quay Parade remains as the main corridor for east-west movements. It will also provide access to some of the principal City Centre car parks. Traffic must be better managed along this corridor and infrastructure and environmental improvements need to reduce severance between the City Centre and waterfront areas.

3.8 Transformation of the corridor by adopting a “Boulevard” approach is critical to “Crossing the Divide” and thus integrating the whole City Centre into an attractive, functional urban centre,

3.9 The “boulevard” concept involves improvements along the length of Oystermouth Road / Victoria Road / Quay Parade to integrate it as a street within a City Centre, rather than acting as a physical boundary at the edge of it. Within the “Boulevard”, a series of key crossing locations (or “Crossing Squares”) would be created.

3.10 The overall concept for the Oystermouth Road corridor Boulevard is that the route would continue to carry high traffic flows but with greater roadspace and priority given to walking and cycling along and across the road, within a high quality landscaped environment.

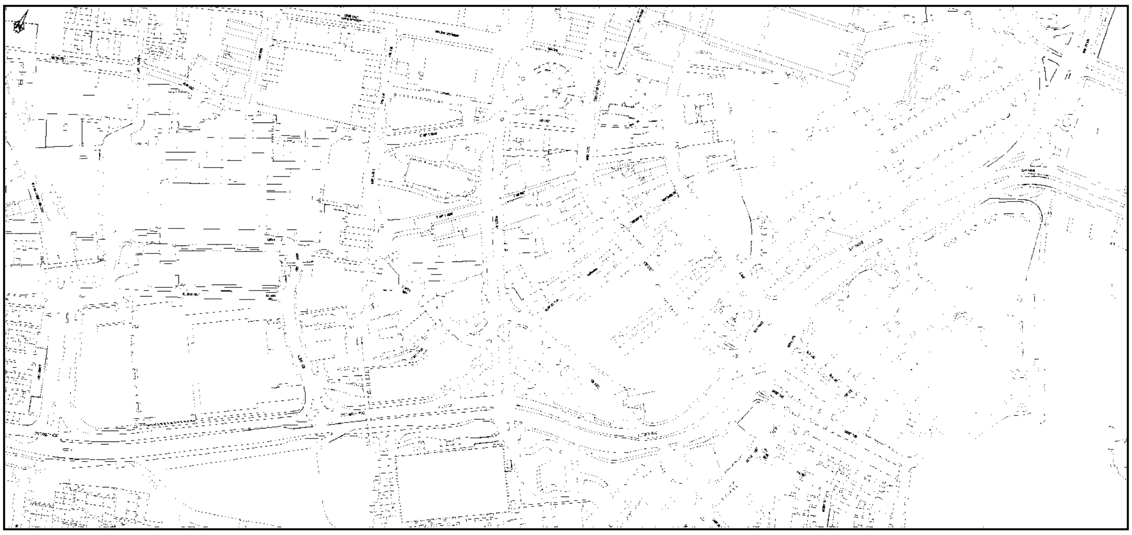


Figure 1: Oystermouth Road / Victoria Road, Swansea

Boulevard Concept

3.11 From an access and movement point of view, measures to create a Boulevard should include the following, along the length of the road:

- **Footways**: These should be improved throughout with new paving, kerbs and street furniture, and widened wherever possible to around 5m or more. On the south side this widening will include a cycleway to assist routing of cyclists travelling between the foreshore cycle route and the City Centre. A key consideration in detailed design will be the presence of underground services which will need to be accommodated.
- **Central reservation:** The central reservation currently varies in width and material specification along the corridor, and should be integrated into improved crossing facilities at some parts of the road. It could be widened generally along the whole corridor, and options for consideration include adopting narrower carriageways and shortening turning lanes.
- **Public Realm / Landscape:** The key element of the 'boulevard' is the urban environment created by active building frontages and high quality landscape.

Crossing Squares Concept

3.12 The Boulevard concept supports the provision of high quality pedestrian and cycle routes across Victoria Road / Oystermouth Road /Quay Parade, at several points where there will be strong "desire lines" between the retail core and the areas and facilities to the south. To achieve this, it is proposed to introduce Crossing Squares into the road alignment at key crossing points:

- "Museum Green" at the bottom of Wind Street • Princess Way, linking to the National Waterfront Museum Swansea
- "St. David's Plaza", adjacent to the refurbished Leisure Centre with enhanced use of the footbridge to the redeveloped St David's area
- "Gateway Plaza" at the West Way / Oystermouth Road junction, linking to the waterfront and the Civic Centre at County Hall

3.13 The form of Crossing Squares could be varied, but should be devised with the following principles in mind:

- High quality design and materials in landscaping, street furniture, footpaths, carriageway and crossing areas to create attractive places which balance the needs of pedestrians, cyclists, public transport and private vehicles
- Traffic lanes adjusted to accommodate the needs of pedestrians with traffic capacity largely unaffected
- New kerb areas on either side of the road and widened, attractive, pedestrian-friendly, central reservation areas or squares
- Split pedestrian crossing movements into separate movements (not staggered crossings), thus presenting a more comfortable environment for pedestrians at each crossing location
- Efficient linkage of traffic signals to ensure that traffic movement is 'platooned' through the local road system, to facilitate improved crossing times for pedestrians

Traffic Capacity

3.14 A key aspect of introducing Boulevard and Crossing Square treatments is the impact on traffic capacity. The Accessibility Strategy envisages maintaining capacity at or around current levels on Oystermouth Road.

3.15 Possible methods of maintaining capacity (when introducing pedestrian-friendly measures) are as follows:

- Maintain the same number of through lanes as at present;
- Rationalize turning movements by deleting some movements and combining other movements;
- Co-ordinate vehicle signals and pedestrian crossing signals such that non-conflicting traffic and pedestrians can move at the same time;
- Introduce local traffic gyratory system to minimize vehicle conflict points (such that all signals junctions are operated with only two stages – Entry and Circulating).

Outline Design Ideas

Introduction

3.16 The ideas for Boulevard and Crossing Square treatments outlined in this Technical Note are preliminary only, and are intended as a precursor to a full investigation of feasibility.

3.17 The ideas looked at in this Technical Note are as follows:

- Museum Square Gyratory
- Museum Green Boulevard / Crossing
- Oystermouth Road (west) Boulevard /Crossing

Precedents

3.18 In order to provide a context for ideas to be developed for Oystermouth Road it is beneficial to look at similar, relevant examples of treatment of road crossings and pedestrian realm elsewhere, where the conflicting demands of vehicular traffic and pedestrians environment have been addressed.

Signalised Gyratory with pedestrianised central island, Central Bilbao

3.19 Located in the city centre, this signalised gyratory is located at a large 'square' with heavy traffic and pedestrian movement. The central island is landscaped to a high quality and provides pedestrians with a pleasant route through an otherwise busy traffic junction (see Figure 2).

Example of Crossing Square Gyratory, Callaghan Square, Cardiff

3.20 A square has been newly created along the line of an urban dual carriageway, just south of the city centre. The area of the square is around 100m wide (building to building), with a 60m wide central island. The central area is landscaped with seating facilities, water features, and high quality lighting – which combine to create an attractive pedestrian environment. Pedestrians crossing the main through-road would do so in two separate crossings – on either side of the square. Traffic flows one-way around the square, and pedestrian crossing signals only therefore affect a single stream of traffic (see Figure 3).

Example of Boulevard, Rotterdam

3.21 An urban dual carriageway has been transformed into a community space by means of widening the central reservation and creating a large play area – with a skateboarding park at its centre. Although this example is not necessarily applicable elsewhere, it is an illustration of the benefit of integrating the road corridor into the pedestrian realm. The wide central reservation at crossing locations also assists in reducing the dominance of vehicular traffic on pedestrian activity (see Figure 4).

Example of Boulevard, Lloyd George Avenue, Cardiff

3.22 This dual carriageway route between the city centre and Cardiff Bay is a recently constructed corridor which from the outset seeks to provide a transport corridor which gives equal prominence to travel by vehicle and by non-motorised modes. A wide (>10m) verge area includes a walking ‘promenade’ and a 3m wide cycle lane. The verge includes hard and soft landscape and provides a community space for local residents as well as functioning as a travel corridor (see Figure 5).

Example of Crossing Square with wide central reservation, O’Connell Street, Dublin

3.23 This dual carriageway street has been transformed into a pedestrian friendly environment by introduction of raised crossings and high quality landscaping. Pedestrian crossings are wider than normal which increases pedestrian crossing capacity (see Figure 6).

Figure 2:
Signalised Gyratory with pedestrianised central island, Central Bilbao

Notes:

1.Upper Photograph: from edge of square.

2.Lower Photograph: from central island.

Figure 3:
Example of Crossing Square Gyratory
Callaghan Square, Cardiff

Notes:

1.View of diagonal pedestrian route across square.

2. Internal / external square is of high quality hard / soft landscape.

Figure 4:
Example of Boulevard, Rotterdam
Notes:
1.Use made of central reservation as community / playing space.
2.Wide central reservation at crossing locations.

Figure 5:
Example of Boulevard, Lloyd George Avenue, Cardiff
Notes:
1.Wide landscaped verge on east side, with pedestrian zone and cycle track
2.Signal junctions along its length have the effect of platooning vehicles along the link.
3.Avenue is new-build and therefore

Figure 6:
Example of Crossing Square, O'Connell Street, Dublin

Notes:

1. Paved Carriageway and Central Reservation.

2. Wider crossing area than standard crossing width.

3. Crossing facility creates a 'square'

Figure 7:

Example of Crossing Square, Strasbourg

Notes:

1. Signalised Gyratory Carriageway and Central Grassed Area.

2. Pedestrian Crossings across grassed square.

3. High traffic flows are accommodated

Museum Green Gyratory

3.24 A gyratory (or roundabout) system is located at road junction locations in many European cities. The success of this arrangement depends on the accessibility, attractiveness, and usage of the c

3.25 entral island by pedestrians.

3.26 A local example of use of the Crossing Square concept is at Callaghan Square at Cardiff, which consists of a clockwise gyratory with a 60m wide central island (see Figure 3). For Museum Green, an outline layout is shown in Figure 8a – which shows an arrangement similar to Callaghan Square. Application of a similar idea, but with a reduced width of island, is shown in Figure 8b.

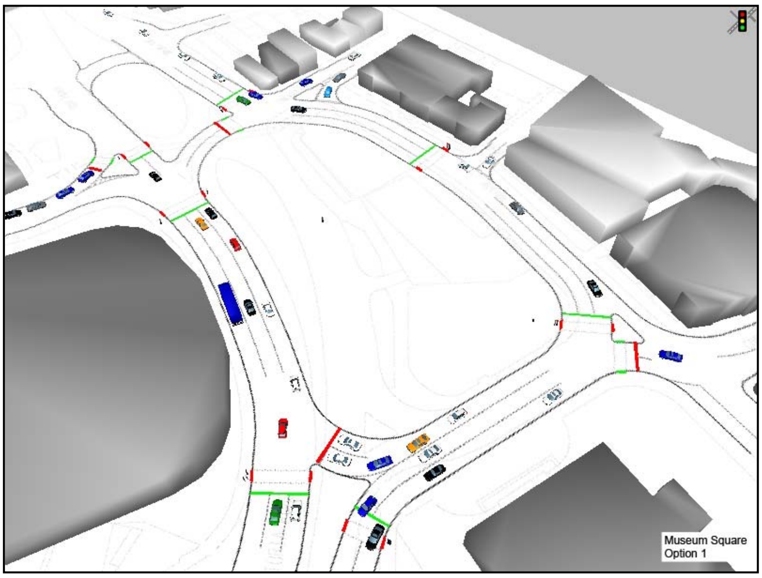


Figure 8a: Museum Green, Swansea

Crossing Square Gyratory using full width of 'square'

Notes:

1.All turning movements catered for.

2.Pedestrian Crossings are all single crossings (not staggered).

3. Area of square is similar to Callaghan Square.

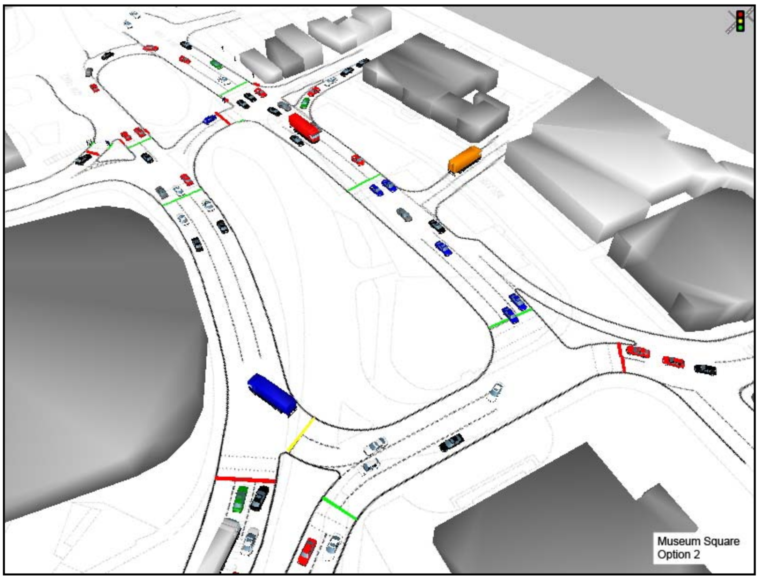


Figure 8b: Museum Green, Swansea

Crossing Square Gyratory using half- width of 'square'

Notes:

1.All turning movements catered for.

2.Pedestrian Crossings are all single crossings (not staggered).

Potential benefits of a gyratory 'square' are as follows:

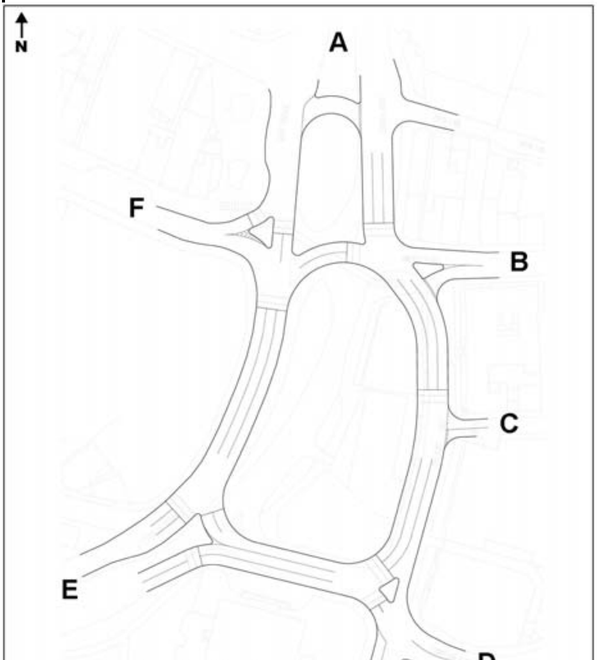
- The 'square' is a space where pedestrian environment dominates the vehicle environment;
- Potential for high quality public realm landscape;
- Safe pedestrian crossings (with only one carriageway to cross at any one time);
- High quality environment which attracts pedestrians (rather than a standard crossing which merely provides a facility for crossing pedestrians); for example, seated areas could be provided in the centre of the square;
- High traffic capacity – especially for turning movements

3.27 A potential disbenefit is that the 'square' is predominantly formed of the gyratory island, and thus would not be suited to narrow corridors.

3.28 Preliminary traffic capacity analysis has been undertaken for a potential gyratory 'square' at Museum Green. A typical peak hour traffic flow (based on an average of AM and PM traffic) has been developed, with assumed turning movements to side roads.

3.29 Initially a TRANSYT (a TRL program which optimises signal timings and offsets between adjacent signals) analysis was undertaken to assess the capacity of the arrangement, and to provide signals timings for input to a micro-simulation model. The gyratory system was then modelled using the VISSIM micro-simulation software. This modelling analysis showed that the arrangement was feasible (in terms of traffic capacity). A 'still' from the VISSIM model is shown in Figures 8a and b.

3.30 The modelling analysis showed that the arrangement was feasible (in terms of traffic capacity).



	A	B	C	D	E	F
A	-	100	50	50	1800	150
B	100	-	10	10	100	50
C	50	10	-	10	50	50
D	50	10	10	-	50	10
E	1800	100	50	50	-	150
F	150	50	10	10	150	-

Figure 9:
Museum Green, Swansea
Peak Hour Traffic Flows

Notes:

1.Based on average of AM and PM traffic

2.Assumed flows for side roads.

Museum Green Boulevard / Crossings

3.31 An alternative layout from a crossing square is to provide a widened pedestrian island, cuch that crossing by pedestrians is made into a more comfortable experience with a reducted perception of exposure to traffic.

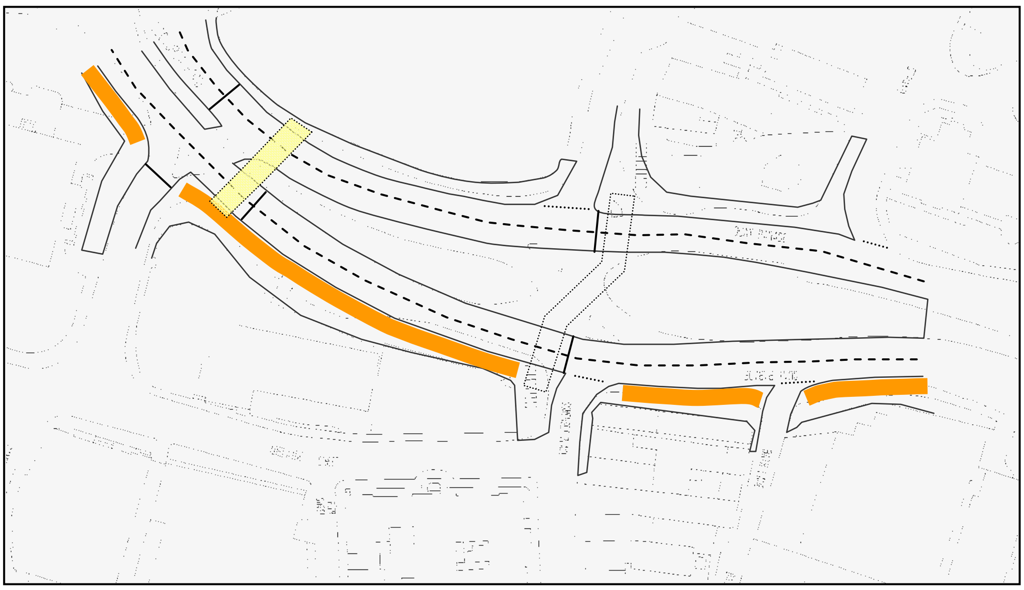
3.32 Figure 10 shows an example of a potential boulevarding treatment. The treatment provides an opportunity to create an attractive pedestrian friendly area, with a wide central reservation.

3.33 Potential benefits of a Boulevard / Crossing Square are as follows:

- Substantial areas of carriageway given over to pedestrians to reduce the dominance of vehicles on the local environment;
- Potential for high quality public realm landscape, which attracts pedestrians (rather than a standard crossing which merely provides a facility for crossing pedestrians); for example, seated areas could be provided in the centre of the square;
- Use of previously trafficked areas for footway / cycleway on east side of road;
- Direct pedestrian crossing routes (with only one carriageway to cross at any one time);

Figure 10: Museum Green, Swansea; Crossing Square / Boulevard

Notes: 1.Wide Central Reservation with some turning movements removed 2.Limit side road entries 3.Maintain through-traffic capacity



3.34 In order to maintain traffic capacity at a level similar to the present, and to allow the 'urban environment' improvements to take place, the following measures are suggested:

- Maintain the same number of through lanes as at present;
- Rationalize turning movements to ensure that overall capacity for through movements is maintained ie. delete right-turn to Wind Street, and re-route this movement via Somerset Place, Adelaide Street and Burrows Place; delete

movement out of Somerset Place to Oystermouth Road and re-route to Burrows Place; delete left turn lanes on Oystermouth Road which have little impact on capacity and can be replaced with footway / cycleway;

- Co-ordination of vehicle signals and pedestrian crossing signals such that vehicles are platooned through the area – this will allow introduction of pedestrian crossings with 'straight-through' characteristics (with a wide central reservation) with little impact on traffic capacity.

3.35 It should be noted that by creating an attractive 'place' for pedestrians, the potential inconvenience to some motorists (wishing to park locally) of removal of some turning movements will be offset by the improved pedestrian crossing environment; that is, drivers will have the opportunity to park on one side of Oystermouth Road and cross on foot to the other side to reach their desired destination.

Oystermouth Road (west) Boulevard

3.36 The Oystermouth Road corridor varies in width along its length, but is generally 25m – 30m wide (from back of footway). There is also a 'buffer' strip on most of the east side of the adopted highway – generally consisting of car park edges and landscaped areas at Museum Green and in front of the Museum. There is thus an opportunity to establish a 'boulevard' consisting of, say, 4 x 3m lanes, with a hard landscaped edge including wide pedestrian and cycle routes.

3.37 Figures 11 and 12 show a typical treatment for Oystermouth Road. The cross-section and plans shown are notional only, but illustrate the opportunity for improving the environment for all road users along Oystermouth Road, and critically, make it a more attractive location for pedestrians to inhabit.

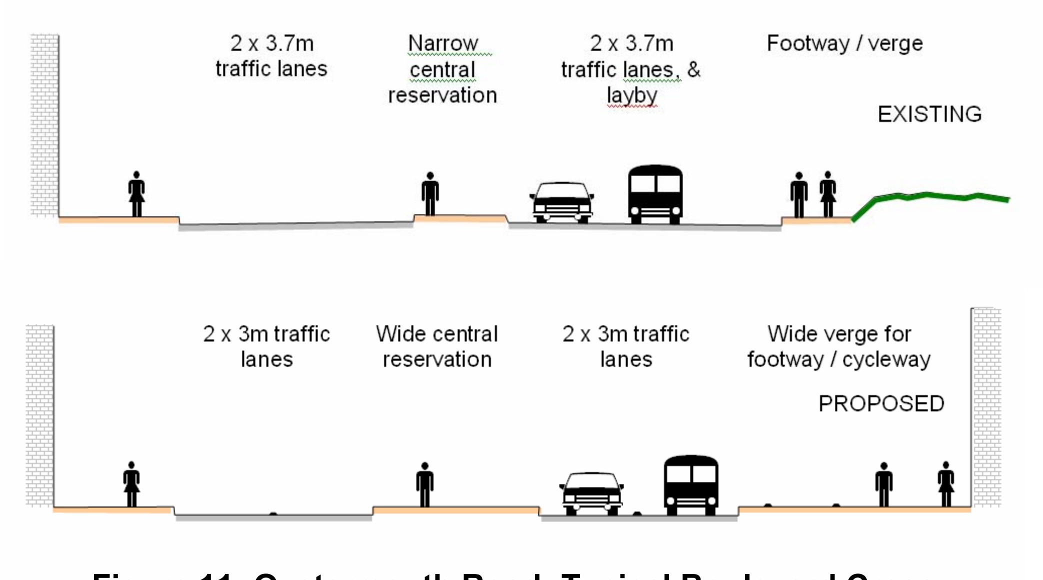


Figure 11: Oystermouth Road; Typical Boulevard Cross - Section

Notes: 1.View is looking east, with wide verge on eastern (foreshore) side 2.Narrowed lanes (3m) provide more

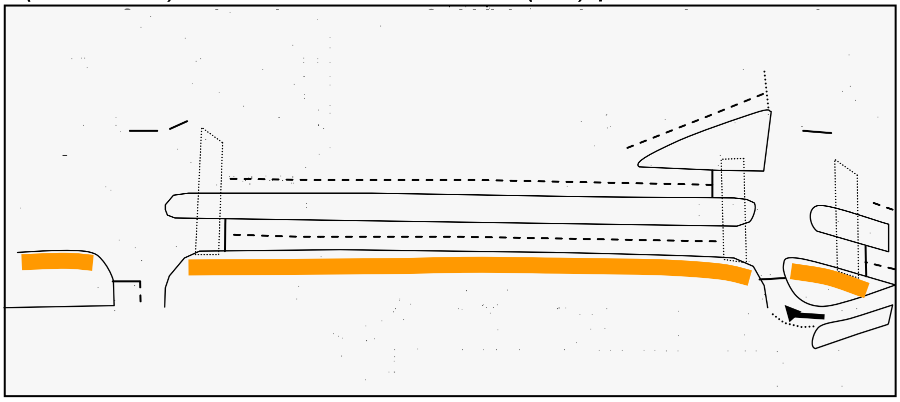


Figure 12: Oystermouth Road (at Leisure Centre), Swansea; Crossing / Boulevard Treatment

Notes: 1.Potential treatments with some turning movements removed 2.Use made of layby as traffic lane 3. Widened central reservation 4. Footway / Cycle lane on east side

Conclusion

The Need for Boulevarding and Crossing squares

3.38 One of the priorities identified for Swansea is "Creating a High Quality European Boulevard" by changing the perception, experience and environment of the Oystermouth Road / Victoria Road corridor, and thereby to "cross the divide" between the City and its waterfront.

3.39 A boulevard with high quality, landscaped, crossing areas ('crossing squares') would provide an effective balance between vehicular and pedestrian movement.

Concepts

3.40 Outline principles for creating boulevard and crossing square environments along Oystermouth Road are:

Boulevard

- Improve footways with new paving, kerbs and street furniture, and widened wherever possible to around 5m or more, including cycleway to assist routing of cyclists travelling between the foreshore cycle route and the City Centre.
- The central reservation should be widened generally along the whole corridor, and options for consideration include adopting narrower carriageways and shortening turning lanes.
- The key element of the 'boulevard' is the urban environment created by active building frontages and high quality landscape.

Crossing Squares

- High quality landscaping materials to create attractive places which balance the needs of pedestrians, cyclists, public transport and private vehicles.
- Traffic lanes adjusted to accommodate the needs of pedestrians with traffic capacity largely unaffected.
- Pedestrian crossing movements split into distinct separate movements (not staggered crossings), thus presenting a more comfortable environment for pedestrians at each crossing location, within a widened, attractive, pedestrian-friendly, central reservation area or square,
- Linkage of traffic signals to ensure that traffic movement is 'platooned' through the local road system, to facilitate improved crossing times for pedestrians.

Precedents from elsewhere

3.41 There are numerous examples of principal dual carriageway roads which as well are operating as a traffic artery also provide a comfortable space for pedestrians to walk along and across. Boulevard and crossing treatments would generally involve signal control of both vehicular and pedestrian movement, but with a significant proportion of the corridor space given over to pedestrian (and cycle) use.

3.42 Local examples of high quality landscaped 'traffic corridors' are in Callaghan Square and Lloyd George Avenue in Cardiff.

Application of boulevard and crossing squares to Oystermouth Road

Traffic Capacity

3.43 Ideas for Boulevarding and provision of crossing squares have been developed (in outline only) which indicate that treatments may be possible without significantly impacting on traffic capacity. Methods of altering the road layout while maintaining capacity (when introducing pedestrian-friendly measures) have been identified, as follows:

- Maintain the same number of through lanes as at present;
- Rationalize turning movements by deleting some movements and combining other movements;
- Co-ordinate vehicle signals and pedestrian crossing signals such that non-conflicting traffic and pedestrians can move at the same time;
- Introduce local traffic gyratory system to minimize vehicle conflict points (such that all signals junctions are operated with only two stages – Entry and Circulating).

Layout ideas

3.44 Preliminary investigations suggest that the following ideas would be feasible:

- Crossing Square at Museum Green: Utilise the large area from Adelaide Street to Oystermouth Road to create ‘square’ with high quality landscape and at-grade pedestrian crossings. Possible layouts include a gyratory which creates simple ‘one-way’ pedestrian crossings, and a widened central reservation which separates crossing movements.
- Boulevard along Oystermouth Road: By rationalising turning movements (and removing some turning lanes) it is possible to increase the width of pedestrian islands and / or footways (and cycleways). There is also space to the east of the road where car park and verge could be converted to a widened footway / cycleway.

Further Investigation

3.45 Further detailed investigation is necessary to fully establish the feasibility of an enhanced pedestrian / cycle environment along Oystermouth Road in the form of boulevarding and / or crossing squares. Particular issues which will require attention include:

- Traffic capacity: Likely to require investigation using micro-simulation modelling techniques;
- Urban design issues: High quality treatment to both the pedestrian and motorised traffic environment will be fundamental to changing the perception, and hence patterns of use, of Oystermouth Road;
- Road safety: All ideas will need to be subject to road safety reviews.

Swansea City Centre: Strategic Framework

Technical Appendix 3

PHYSICAL STRUCTURE AND URBAN DESIGN ISSUES

CONTENTS

Swansea City Centre: Strategic Framework

Technical Appendix 3:
PHYSICAL STRUCTURE AND URBAN DESIGN ISSUES

3.1 Physical Structure and Urban Design Analysis

1 LOCATION

Swansea, or Abertawe meaning 'at the mouth of the Tawe' is strategically located at the mouth of the River Tawe on the northern coast of the Bristol Channel. Located approximately 50 miles west of Cardiff the title 'Gateway to South West Wales' is well founded.

The City of Swansea itself is on the northernmost point of the bay and partially protected from the currents of the Atlantic by the Mumbles Peninsula. Mumbles and the Gower area are important to Swansea, being the primary tourist destinations in the City's catchment area. Mumbles is easily accessible from Swansea and is a feature on the panoramic landscape from the marina area. Equally, Swansea can be seen from the Peninsula.

To the east of Swansea lies Port Talbot. A commuter town and also the site of the areas primary industry in the British Steel/Corus works. These works are hidden by hillsides dotted between but its skyline is remarkable by both scarring the landscape and providing an impressive engineering spectacle.

The northern areas of Swansea are the City's residential districts, villages and towns encompassed by the expansion of the urban area. Notably, the River Tawe is lined with light and heavier industrial units and railway land. The only areas in northern urban Swansea where the river is public is the Mofra Stadium and Retail Park.

The Morfa area is split by the River Tawe. The stadium to the west with its associated car parking turns its back on the river. There is an impressive footbridge across the River and footpath along, however, the imposing structure of the Stadium has no direct relationship with the waters edge. The retail park to the east side again ignores the river and partly encloses the large swathes of car parking. The landscape treatment is handled well, however.

The Enterprise Park and Fforestfach Retail Park are similar in nature also set within landscaped areas but incorporating standard retail warehouse/office layouts without utilising the existing topography or landscape. They present car orientated sites.

Figure 1 Location of Swansea in South Wales

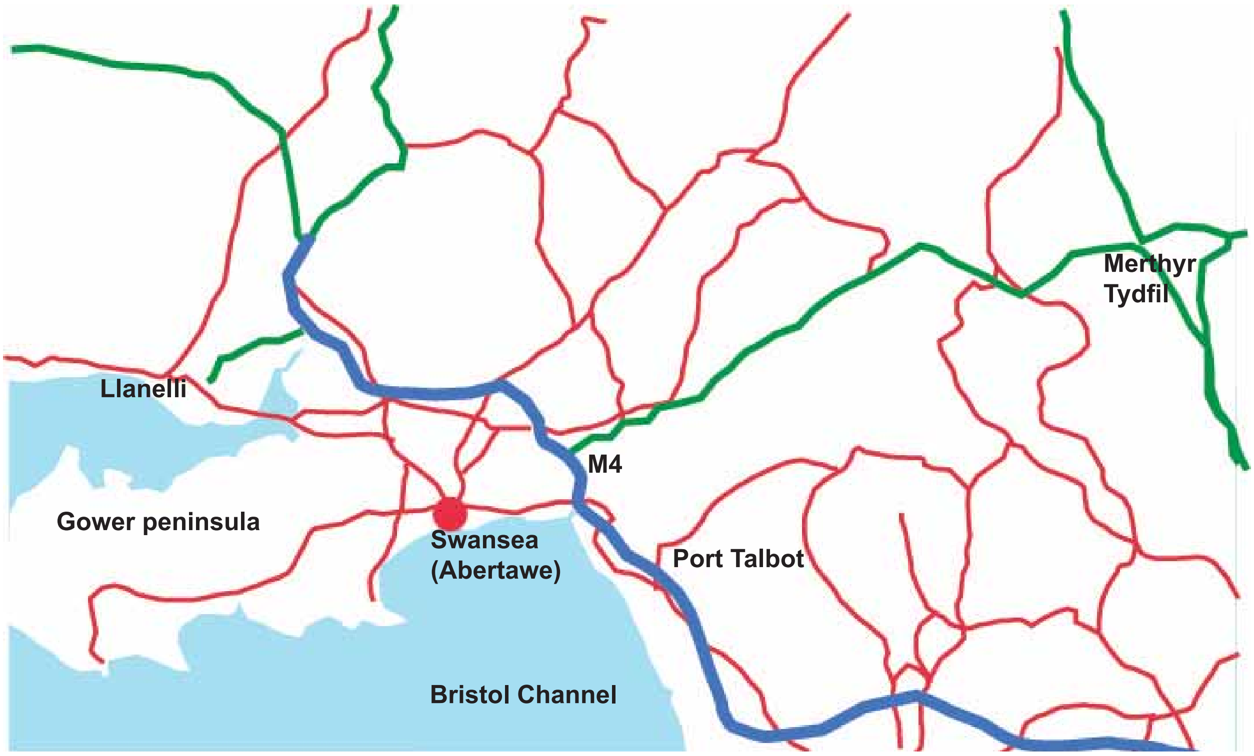


Figure 2 Swansea as the 'Gateway to South West Wales'

Figure 3 The Greater Swansea urban area

2 HISTORIC REVIEW OF THE CITY CENTRE

Swansea's City Centre has grown and changed over centuries, and continues to evolve today in response to changing economic and social circumstances.

The shape and character of the City Centre was substantially determined by industrial development of South Wales from the mid-18th century. The growth of mining and metal industries stimulated major investment in new docks and railways and led to high levels of industrial employment and new urban growth. The population of Swansea (now over 220,000) grew to 10,000 in the early 1800s; to around 20,000 in mid-1800s; and to nearly 100,000 by 1900.

The early urban growth of Swansea is still evident in the smaller area of Georgian streets and buildings near the Old Town Hall (now the Dylan Thomas Centre), and the civic pride of later phases is evident in some surviving public buildings such as the former Head Post Office, Wind Street (now a café bar/restaurant, offices and housing by Swansea Housing Association), the Swansea Harbour Trust Office (now Morgan’s Hotel), and the Carlton Cinema in Oxford Street (now Waterstone’s bookshop).

Bombing in the early 1940s flattened much of the established retail and commercial areas of the City Centre, and resulted in the loss of many attractive streets and buildings. The new City Centre, planned on a grid-pattern of roads including the main thoroughfares of Kingsway, Princess Way, West Way and Oystermouth Road, created an urban structure which is still a major influence on the functions, environment and perceptions of the City Centre. Other areas such as the River Tawe riverfront and the South Dock (now the “Maritime Quarter”) were still very much port and industrial areas, separated from the City Centre by railway viaducts and roads.

Redevelopment continued in the 1960s, 70s and 80s, including the construction of the Quadrant Centre, St. David’s Centre, County Hall, Parc Tawe and the demolition of railway viaducts at Victoria Road. These developments reinforced the structure of the City Centre as a largely retail centre (with only limited office accommodation and housing) based on the post-war road grid.

Recent developments have begun to re-establish some diversity and distinctiveness in the City Centre. Rejuvenation of Wind Street and Princess Way, including Salubrious Place, has made a major difference, with links across Oystermouth Road to the Maritime Quarter. The National Waterfront Museum, more housing in the Maritime Quarter, and the planned refurbishment of the Leisure Centre will draw more people and bring more life to this part of the City Centre. Development is also progressing across the river in SA1, with substantial development of new office buildings, housing, cafes/restaurants/bars, and other facilities all contributing to a new focus of city life.

The economic context and competition for the City Centre have changed and hardened dramatically in recent years. Cardiff has become established as the much larger City of South Wales, with a stronger City Centre and the structure of a modern urban economy. Global change has restructured the national and regional economy, creating different demands on the City Centre. Swansea’s economic role has changed dramatically in the past 20 years. The City Centre needs to respond to that change, and lead the City and County, and the wider sub-region in the 21st Century.

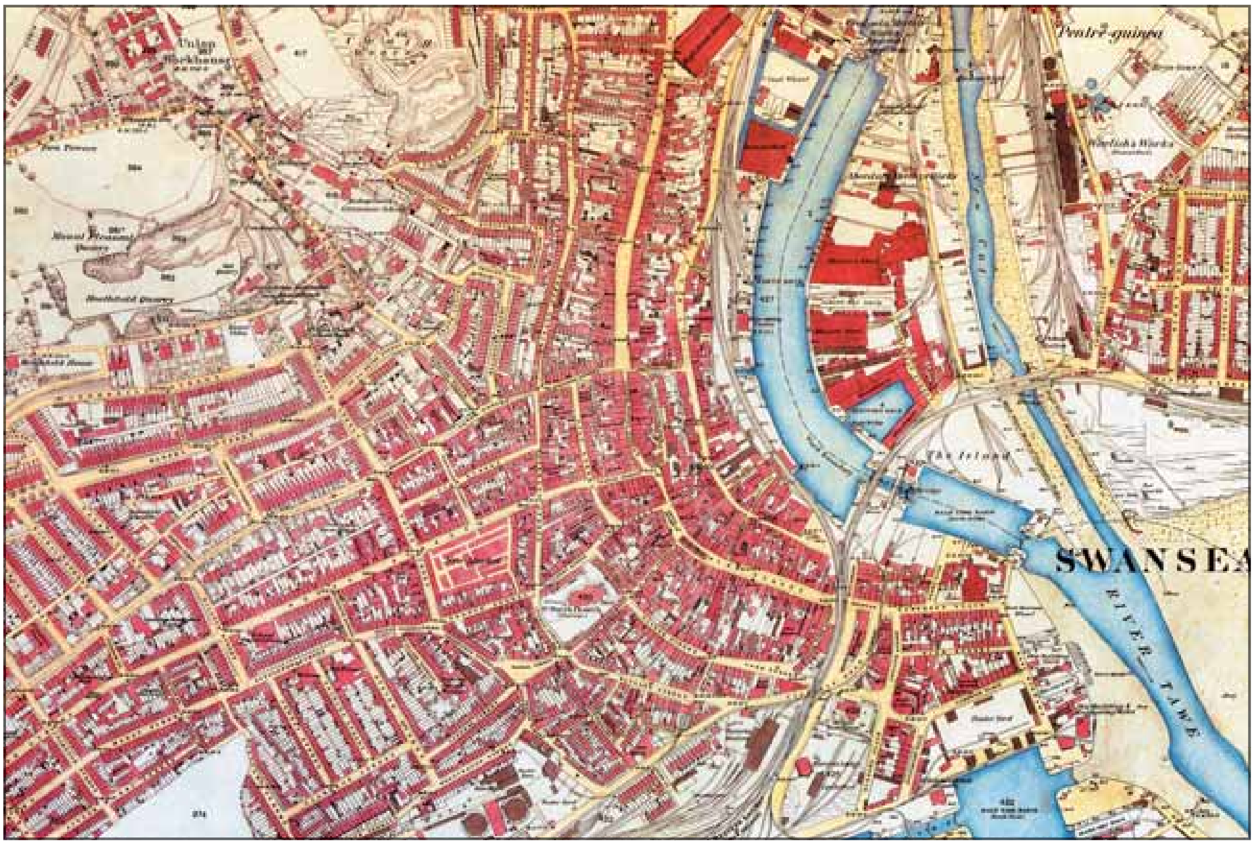


Figure 4 Historical map of Swansea dated 1878 (not to scale)

3 STUDY AREA

The Study Area was defined to encompass all of the main retail and commercial areas of the City Centre.

The main focus of the City Centre is the area around Oxford Street, Castle Square, and the Quadrant Shopping Centre. It is constrained by key transport corridors at Kingsway, West Way, Oystermouth Road/Victoria Road and Wind Street. It also includes more established areas around Alexandra Road, High Street, Wind Street and the Castle. A more recent edge of centre retail area is situated immediately to the east at Parc Tawe.

The City Centre includes the "Maritime Quarter" extending down to the seafront, developed around the old South Dock. Predominantly a residential area, it includes some important heritage buildings and structures and is also an important leisure and cultural part of the City Centre, linking to the beach and promenade. Swansea Museum, the Leisure Centre, which is currently being refurbished, and the new National Waterfront Museum Swansea now comprise an important group of facilities which serve the City and surrounding areas.

County Hall is situated southwest of the City Centre and on the seafront, whilst SA1 Swansea Waterfront is located to the east across the River Tawe. Both are outside but adjacent to the study area, and the Strategic Framework clearly acknowledges their importance, and the need to improve connections between them and the City Centre.

Proposals in the Strategic Framework are intended to secure the future of each of the component parts of the City Centre, to enhance the synergy between them, and to integrate them into a vibrant, successful City Centre.

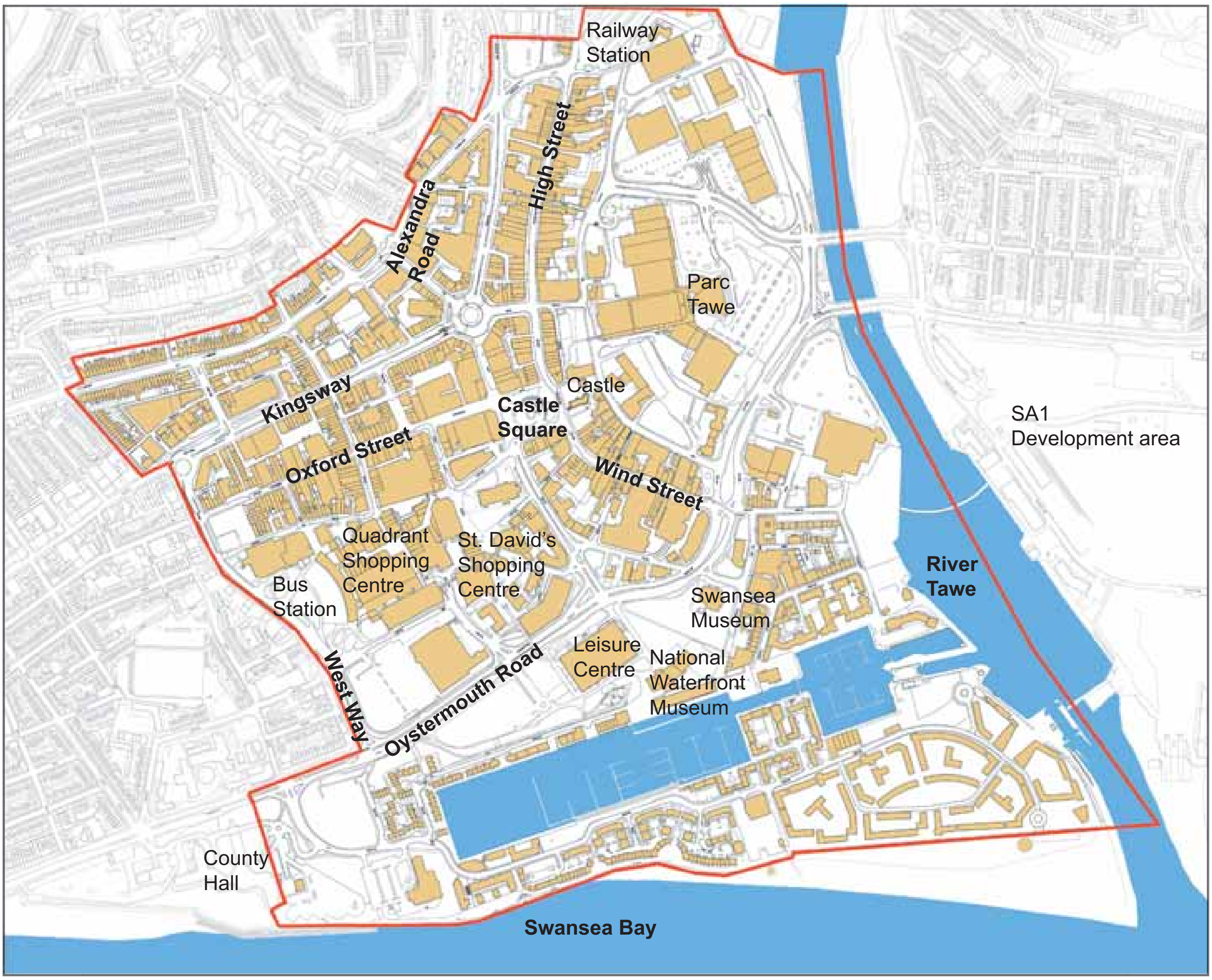


Figure 5 Study area (not to scale)

4 CONSERVATION AREAS AND LISTED BUILDINGS

As a city with a rich history dating back to medieval times Swansea has a range of significant historical buildings that have survived. This is despite the heavy bombing it suffered in the Second World War, and the extensive post-war programme of highway infrastructure works, which gave rise to the extensive rebuilding of the central retail area.

Swansea has four Conservation Areas within its City Centre boundary. These are Alexandra Road, Oxford Street/ Nelson Street, Wind Street and the Maritime Quarter. In addition, the City Centre has one Grade 1 listed building; the medieval Swansea Castle. The Castle ruin is both Grade 1 listed and a Scheduled Ancient Monument. It is well sited on the edge of the eastern escarpment that once looked directly over the River Tawe before land was reclaimed. It is, however, overshadowed by the greatly larger landmark of the BT building, the tallest in the city and also lies next to a derelict site and blank facades. This compromises the setting of the Castle in this location.

Most of Swansea's better historic buildings - there are over 70 Grade 2 listed buildings in the City Centre - date from its historic industrial past and are good quality examples of the sort of civic, residential and commercial buildings developed at the time. They are also, therefore, very varied in style as the older medieval character was not retained and new building materials and styles allowed greater variety.

The Alexandra Road Conservation Area covers 2.4 hectares of land on the northern edge of the City Centre. The Conservation Area respects the cluster of distinguished, mostly Victorian and Edwardian, buildings in rich classical and baroque styles, largely built in brick and portland stone. They originally lined the Alexandra Road Grand Boulevard.

The Oxford Street/Nelson Street Conservation Area covers 1.3 hectares of land in the centre of the City and incorporates part of what is the primary retail street. This Conservation Area respects the individual properties of historic and architectural merit rather than a specific defining character, largely as this was one of the areas worst hit by the bombings.

The Wind Street Conservation Area covers 5.4 hectares of land and is located in that part of the City Centre leading down to the Maritime Quarter. The Conservation Area contains a group of high quality, stone and terracotta built historic buildings. These have now mainly been converted into eating and drinking establishments, but the visual character as a distinctive area of a prosperous Victorian and Edwardian city where banks and commercial establishments were situated, has been maintained. The new Salubrious Place development at the bottom of Wind Street echoes this rich, diverse character.

The Maritime Quarter Conservation Area covers 5.1 hectares to the southern edge of the city centre and lies strategically between the main retail heart of the City and the waterfront to both Swansea Bay and the River Tawe. The area was known as ‘The Burrows’. It is dominated by late Victorian and Edwardian office buildings generally constructed of brick and stone. The maritime Quarter contains several Georgian terraces from early 19th Century Swansea, in addition to the former industrial buildings now converted into the Pump House pub/restaurant and the National Waterfront Museum Swansea.

Overall the City Centre is well stocked with listed buildings, such as the variety of gothic and classical styled churches, however, with the exclusion of Wind Street and the historic maritime areas, the listed buildings are dispersed and do not form a cohesive historic centre. This is not to say that key buildings may not in the future set the tone for an area being redeveloped.

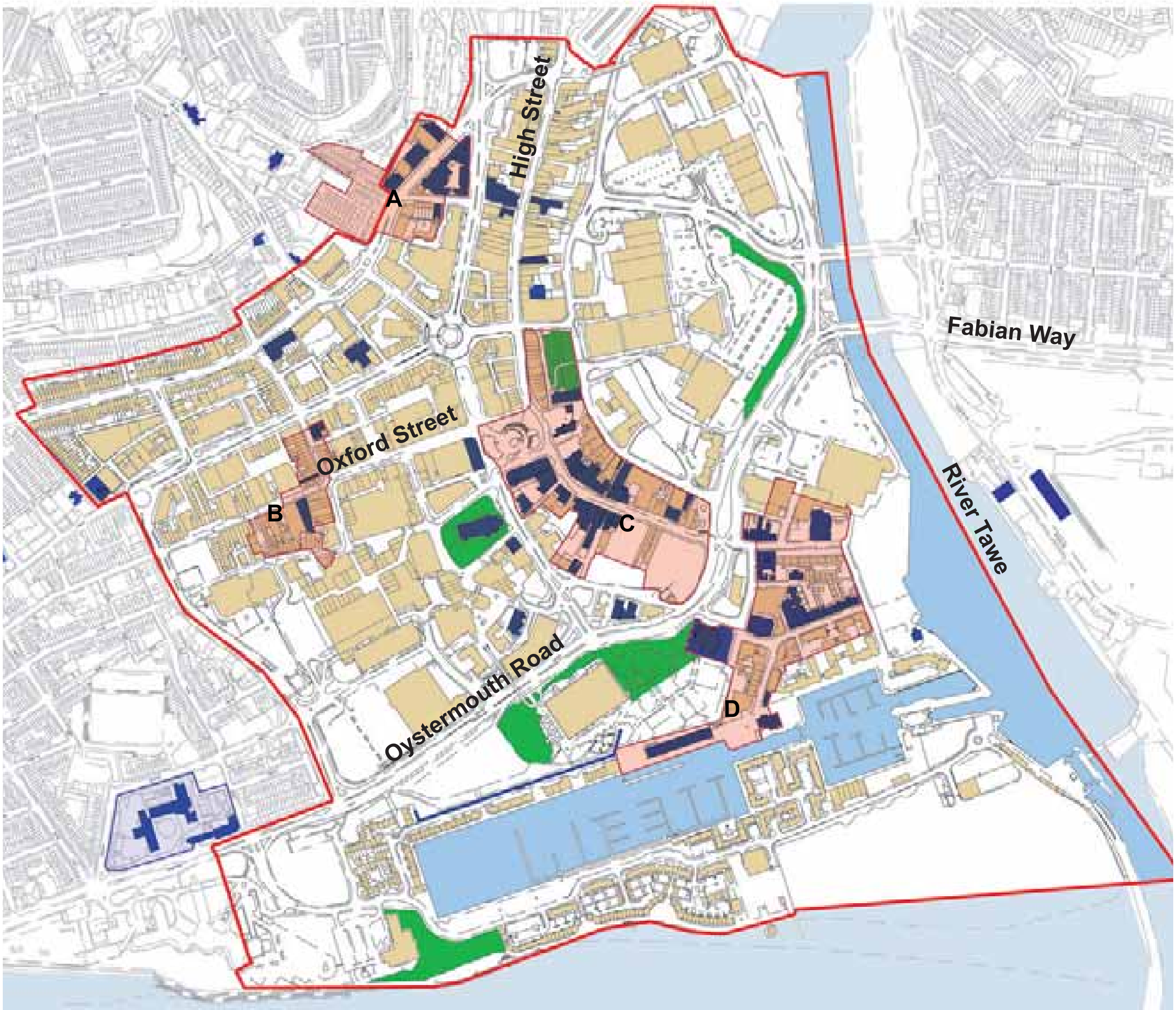


Figure 6 Conservation Area Plan indicating listed buildings (1:10000 scale)

Key:

- Conservation Area
- Listed Building
- Listed wall

A Alexandra Road Conservation Area
B Oxford Street/Nelson Street Conservation Area
C Wind Street Conservation Area
D Maritime Quarter Conservation Area

5 PHYSICAL ANALYSIS

Topography and the Flood Plain

Flood risk is potentially a serious development issue within important parts of the City Centre. The plan extract from TAN15 printed below indicates that a section of the study area is designated as Zone C1 (protected by flood defences) and a section as Zone C2 (unprotected). Both areas are considered to be at risk by the Environment Agency.

Hyder Consulting (UK) has, however, been commissioned by the City and County of Swansea to carry out a Flood Consequences Assessment in respect of key City Centre locations. The 1 in 200 and 1 in 1000 tidal flood levels have been determined and agreed with the Environment Agency Wales as 6.55m and 6.85m above ordnance datum (AOD) respectively (with allowance made for global warming).

The results of the assessment show that at the extreme event, flooding would be localised around the bank of the River Tawe. It follows, therefore, that the flood zone classification as defined in TAN15 is considered to be incorrect and that consequently, allowing for the one exception referred to above, the study area.

Figure 7 Maritime quarter without defence

Figure 8 Seafront with flood defence

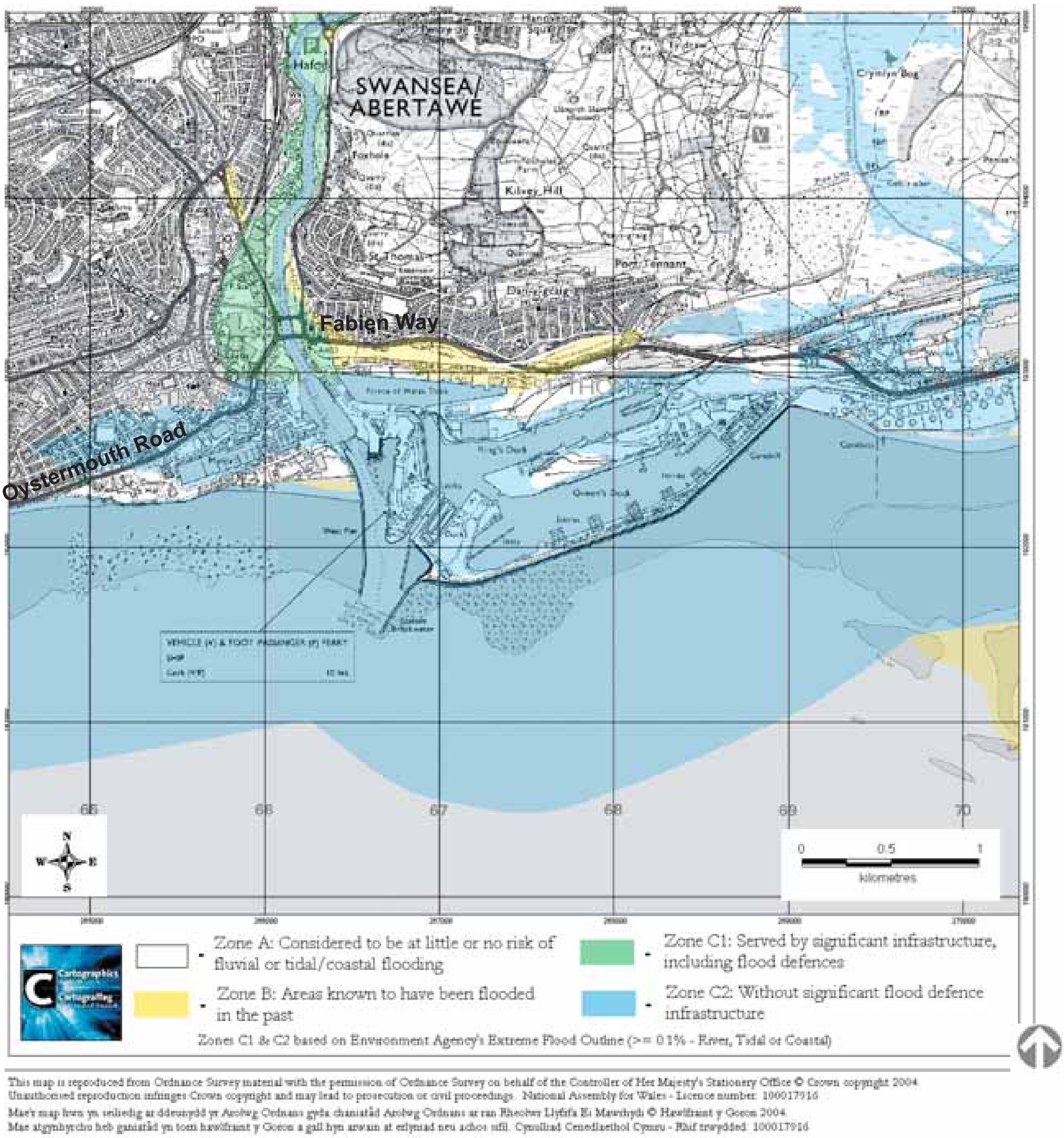


Figure 9 Plan indicating the Swansea flood plain (nts)

Figure 10 The northern topography

Figure 11 Strand embankment

Districts and Land Use

The City Centre area has a number of distinctive districts largely based on different land uses. At the heart of the City is the retail core. This area contains a lot of post Second World War 2 and 3-storey retail development. The edges of the retail core, particularly to the north and west are of low quality, built stock with secondary retail at best.

Parc Tawe retail park is situated immediately east of the City Centre on flat lower lying land separated by topography from the retail core. It is composed of out of town warehouse format retail buildings which are inappropriate in a prime gateway location so close to the City Centre, and has no relationship with the river.

The Maritime Quarter incorporates a variety of uses with new residential developments around the marina areas and civic, office and residential uses in the historic area. The quarter as a district functions against a waterside backdrop and incorporates all the particular maritime characteristics of restored docks, moored boats and good open views.

A distinctive evening entertainment district has grown up along Wind Street, one of the most homogeneous and high quality Victorian Streets left in the City. The former banks and other commercial buildings have been sensitively converted to eating and drinking establishments which do well to retain the character of the street. The other evening entertainment district is centred around the Kingsway, which is a wide “boulevard” street, laid out in the post-war period, now home to a number of nightclubs and similar venues, the street has some poor quality buildings and surfaces.

The High Street area is a secondary retail district with a generally good level of built stock and forms the main route from the railway station to the city centre. Even so, some buildings are poorly maintained plus a few poor quality buildings along the street bring down its environmental attractiveness as a whole.

There are two civic clusters in the City itself which are big enough to form districts. To the north, the Swansea Institute, Glynn Vivian Art Gallery, police station, magistrates’ court, and central library offices make up one area around Alexandra Road. Several grand buildings are situated here, some of which have immediate requirements in terms of maintaining their condition. To the west, the Civic Centre at County Hall, prison, and theatre, around West Way and Oystermouth Road make up the other. The latter district has a lack of cohesiveness and a very disjointed character as a result of its dispersed facilities.

Figure 12 Retail district


Figure 13 Edge of centre district

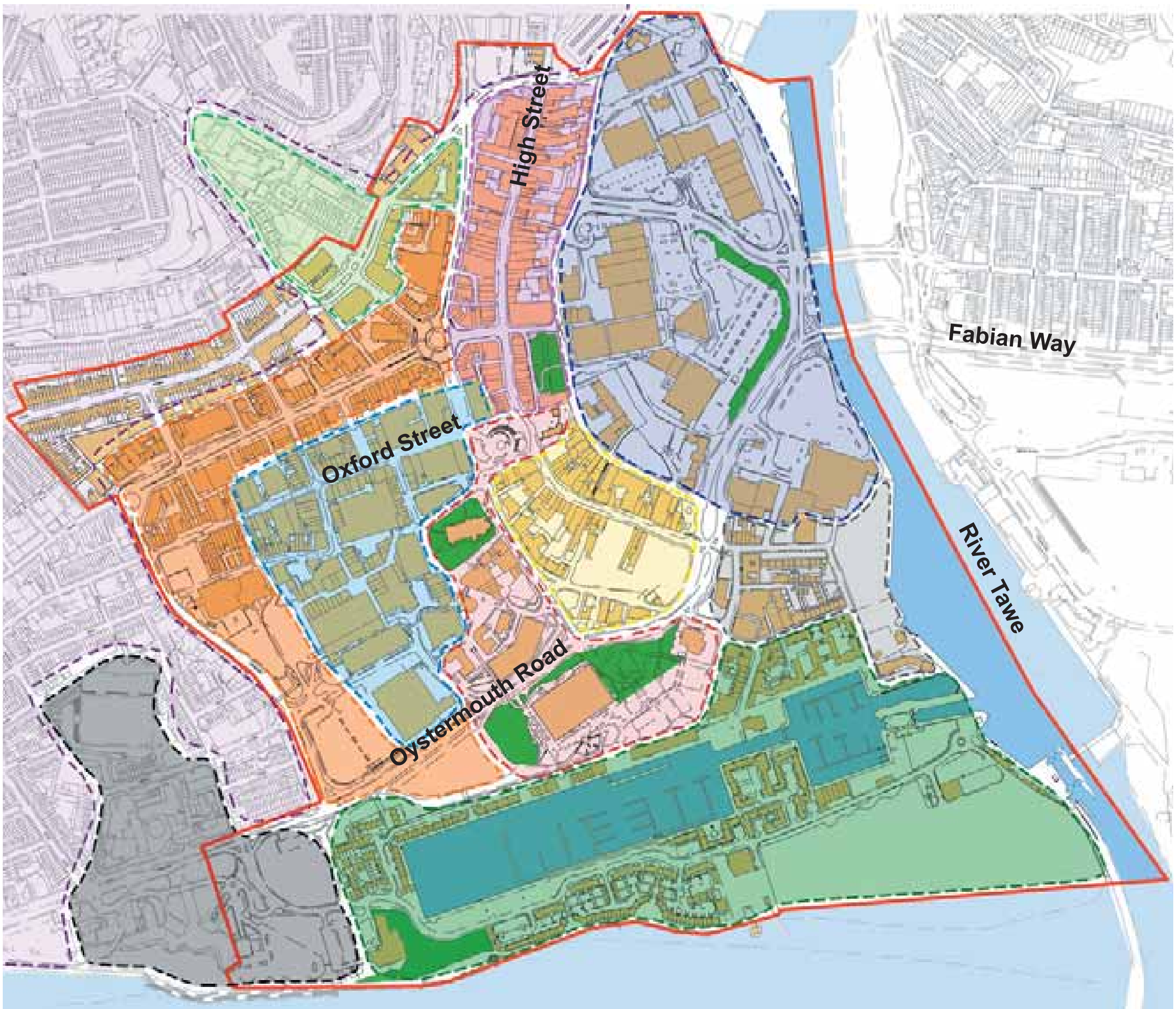


Figure 14 Districts and land use plan (1:10000 scale)

Key:

- Retail warehousing
- Historic Maritime mixed use
- Maritime district
- The High Street secondary retail
- Evening entertainment
- Civic leisure area
- The retail centre
- Edge of centre secondary services
- Civic cluster 1
- Surrounding residential districts
- Civic cluster 2

Figure 15 Maritime district

Linkages

The main line railway station sits at the top of the historic embankment at the end of the High Street and overlooking the Parc Tawe and River Tawe to the east. This is now a peripheral location in relation to the retail core, which shifted down to Oxford Street some years ago. The bus station is better located next to the retail core, but its separation from the railway station is such that interchange between transport modes is difficult.

Movement within the City Centre core is generally easy. There is a large area of pedestrianised or shared surface streets from Castle Square along Oxford Street and its neighbouring streets. The Kingsway to the north is a wide street (originally intended as a boulevard) which now presents a barrier to the adjacent residential areas. Traffic engineering at the Kingsway Roundabout has created an environmentally unfriendly underpass system that detracts from what could be a strong and focused space. The West Way presents a similar road barrier on the western edge of the City Centre.

The historic escarpment to the East of the Castle and overlooking Parc Tawe is poorly negotiated by existing pedestrian routes. The main access to Parc Tawe from the castle dodges around the back of it and then has to pass through the shopping building itself to get down to the lower level.

The most significant barrier to movement between the City Centre retail core and the waterfront is Oystermouth Road. It has been engineered to give priority to vehicular traffic traveling around the Bay, and gives little consideration to the pedestrian, and no views over the Bay. The psychological impact of this barrier is increased by the looseness of the space around it - lack of enclosure, blank facades and car parking dominate perception of this road. Even with a subway, footbridge and various traffic light junctions, pedestrian access across is an unpleasant and uninviting route to the City's key waterfronts locations. The treatment and perception of Oystermouth Road as a bypass is a primary reason for the generally held view that Swansea has a lack of quality in terms of its linkages and environmental routes.

Figure 16 Oystermouth Road - a major barrier

Figure 17 The Station square gateway

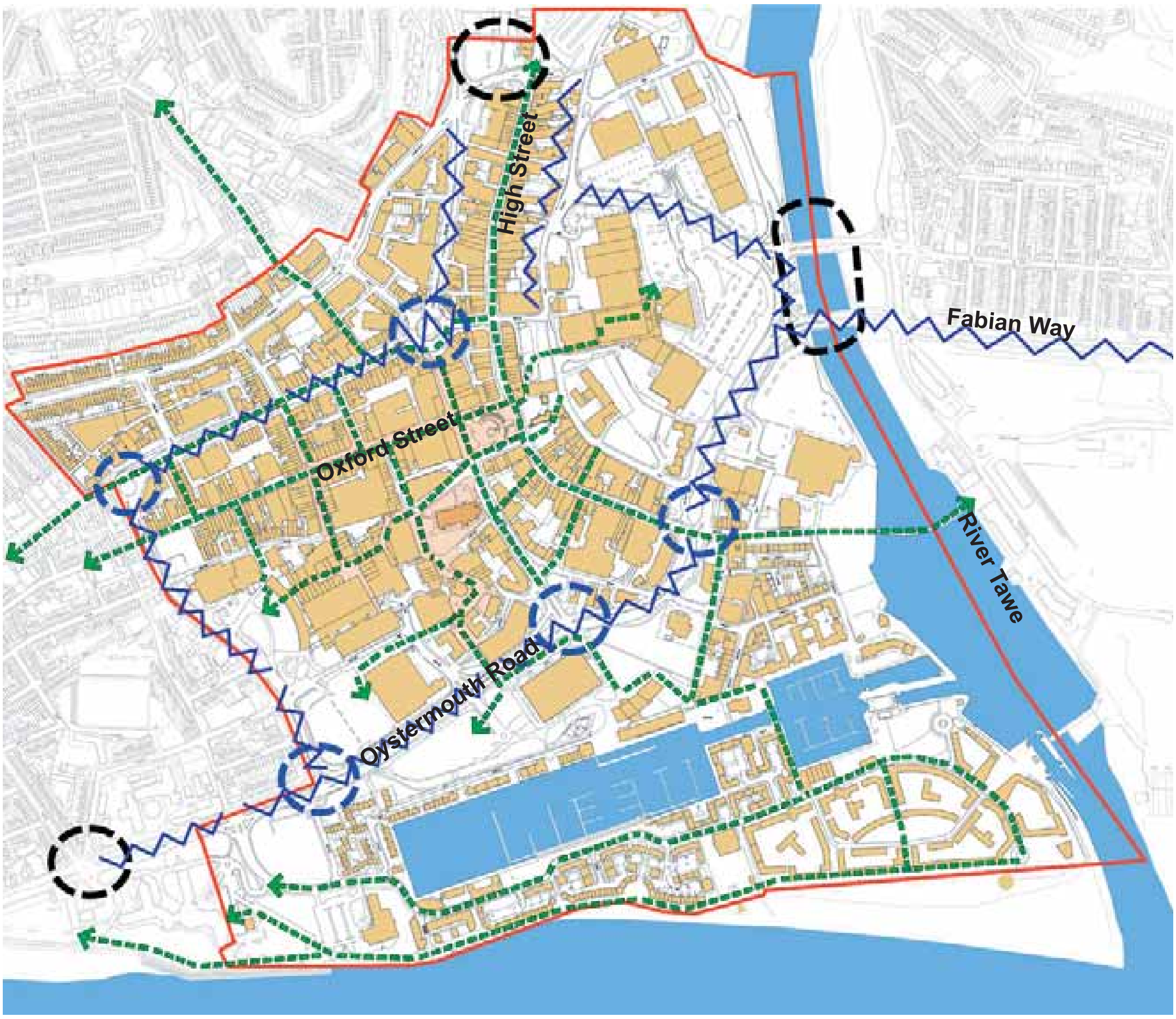


Figure 18 Access and movement plan (1:10000 scale)

Key:

- Pedestrian/shared surface
- Surface car park
- Pedestrian route
- Barriers to ped movement
- Pedestrian subways
- Pedestrian bridges
- Gateways into the City
- Nodes around the city
- Multi storey car park

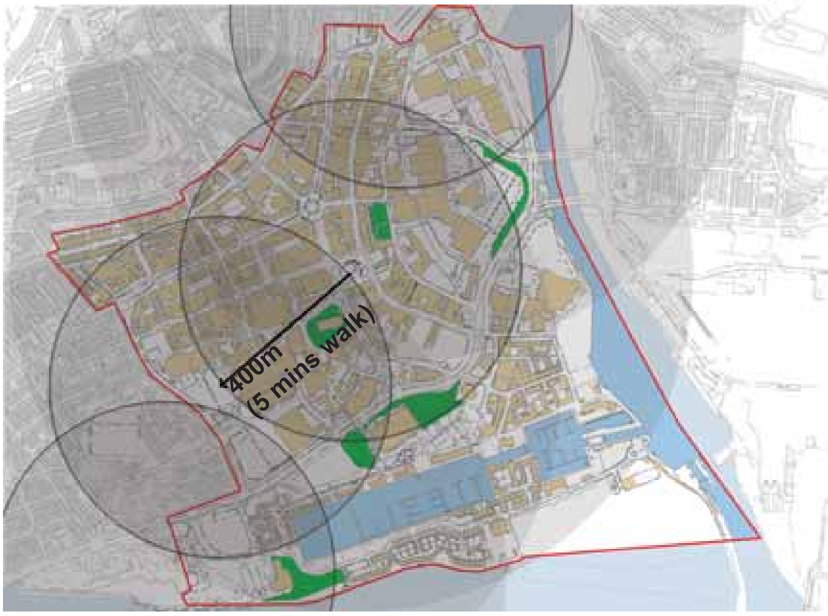


Figure 19 Walking distances around the City Centre

Quality of Edges and Spaces

The low quality environment along Oystermouth Road, the Parc Tawe development, and most of the Kingsway, caused by the dominance of wide roads, large areas of car parking, and poor quality architecture dilutes the perception of Swansea as a City with any urban quality in the eyes of visitors.

Generally, within the City Centre retail core, the edges are active and built to pavement lines. Of particular quality is Wind Street which retains its medieval urban grain. The primary retail streets such as Oxford Street and Nelson Street have active edges too, however the general quality of buildings lets down the overall perception of what is a vibrant and well used space. Oxford Street proportionally works well with generous spatial widths to accommodate large numbers of pedestrians, although there is too much street clutter and the hard landscaping is tired. Other streets around this area such as Kingsway and Princess Way north are significantly wider than Oxford Street yet do not encourage the same amount of footfall. Therefore, they appear spatially open and awkward in scale. The High Street is another well proportioned street, but the quality of the buildings here brings down its visual appearance, despite some notable attempts at improvement in individual cases.

The St David's Shopping Centre is poorly conceived in retail and in urban design terms. The development is too far from the retail circuit and therefore suffers from low footfall. It only attracts lower quality retail units and has a significant vacancy rate, and in turn this has resulted in the poor environmental quality of the spaces.

Oystermouth Road and West Way are negative environments. They are composed predominantly of car parks building rears, footbridges, underused open spaces, and large monolithic buildings that fail to provide active frontages. As a result they present ineffective and inconsistent edges and spaces. These encourage faster driving and are reminiscent of the Fabian Way bypass, not a city centre street. Several large spaces have been created along Oystermouth Road where the roadside has been treated with landscape.

Once into the maritime areas, the environmental quality improves considerably with the historic built area to the east and positive edges to buildings around the marinas and seafront.

Figure 20 Retall core - active edges

Figure 21 St Davids retail - illegible edges

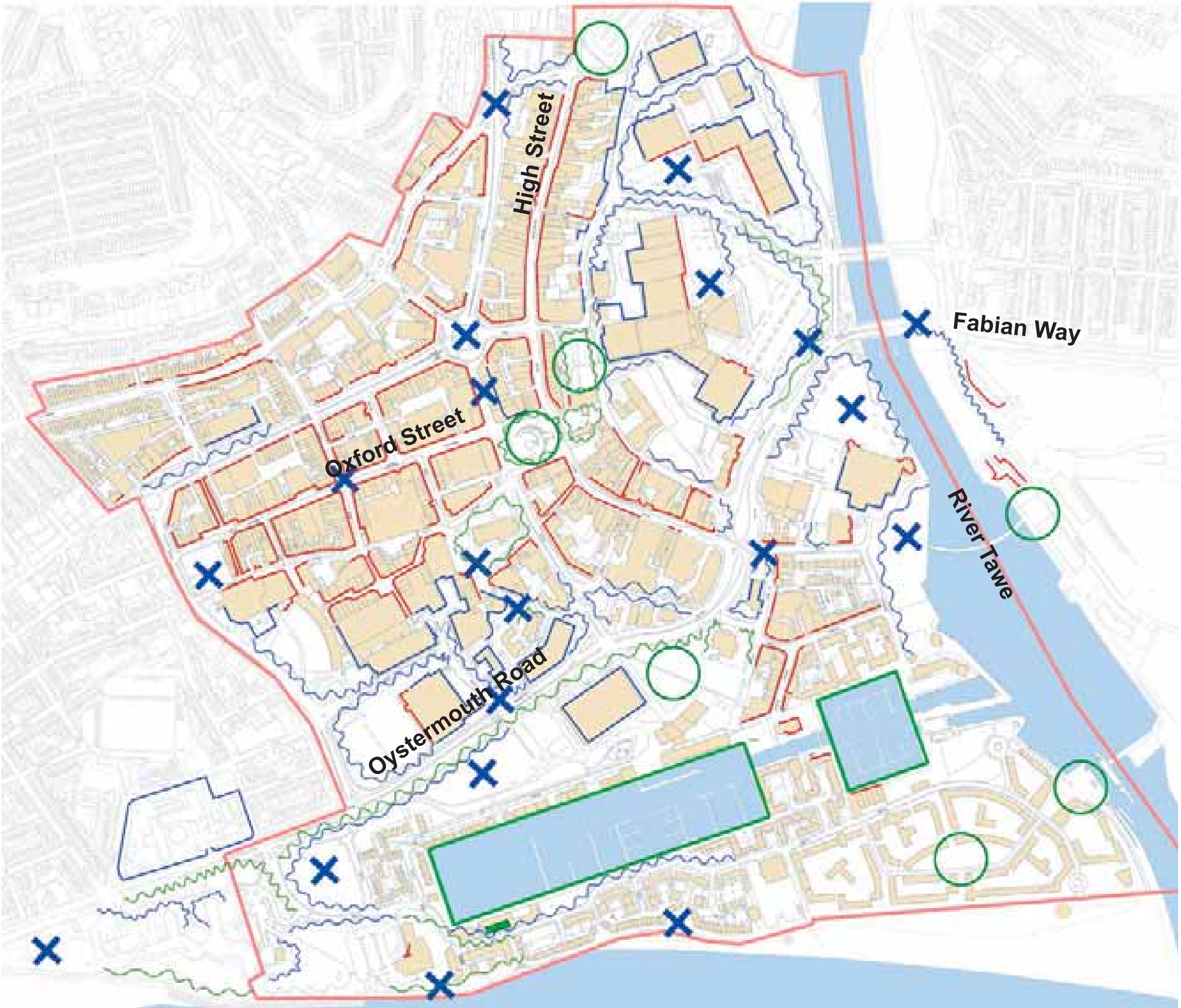


Figure 22 Access and movement plan (1:10000 scale)

Key:

Negative spaces

Active/positive edges

Negative edges

Green/positive open spaces

Figure 23 Active yet negative space

Figure 24 Maritime - inactive yet positive edges

Legibility

The City is located on a hillside rising steeply above the central core. There are therefore many opportunities to move legibly around the City.

Swansea has numerous landmarks. These are all dispersed. Of these landmarks, few are of good design which would give the City a positive image. The BT building and DVLA office are both tall buildings which stand out in the townscape. They are both of poor quality design and so it is eyesore landmarks rather than positively contributing to the townscape. The leisure centre and Plantasia are landmarks by virtue of their visibility along the bypass at some distance, however, Plantasia is of reasonable and interesting design. The Civic Centre and libraries are also seen from distance but they have a certain strength of design which dominate the surrounding buildings. The footbridge adjoining SA1 with the maritime quarter is the only positive image making landmark in the centre of Swansea.

Located as it is, there are many opportunities for panoramic views of the City, its surroundings and waterfronts. The embankment along Strand is an ideal location. Unfortunately, the pedestrian links cross over to the retail centre rather than the River Tawe itself so the views are wasted as access is difficult. The seafront is another ideal location for panoramic views. Along the seafront there is a promenade leading to Mumbles. This is a fantastic opportunity which currently stops before the mouth of the River Tawe.

With the rectilinear nature of the City Centre redevelopment after the WWII bombing, the opportunity to walk through Swansea through interesting places and spaces is reduced. The City is, however, based on a clear structure with axial routes leading from the railway station south to Wind Street, the maritime quarter and to the seafront. Oxford Street runs perpendicular and connects at the Castle Square. This is a legible connection of the City's major routes. The loss of opportunity for linkages through small streets, into interesting courtyards whilst following a landmark, glimpse or vista weakens the experience of Swansea's townscape.

With better and more appropriately located landmarks, routes and spaces to link into the small areas of quality, Swansea can regenerate into a hugely successful, vibrant and playful City.

Figure 25 View through the Castle Square to the landmark BT building

Figure 26 The seafront panorama

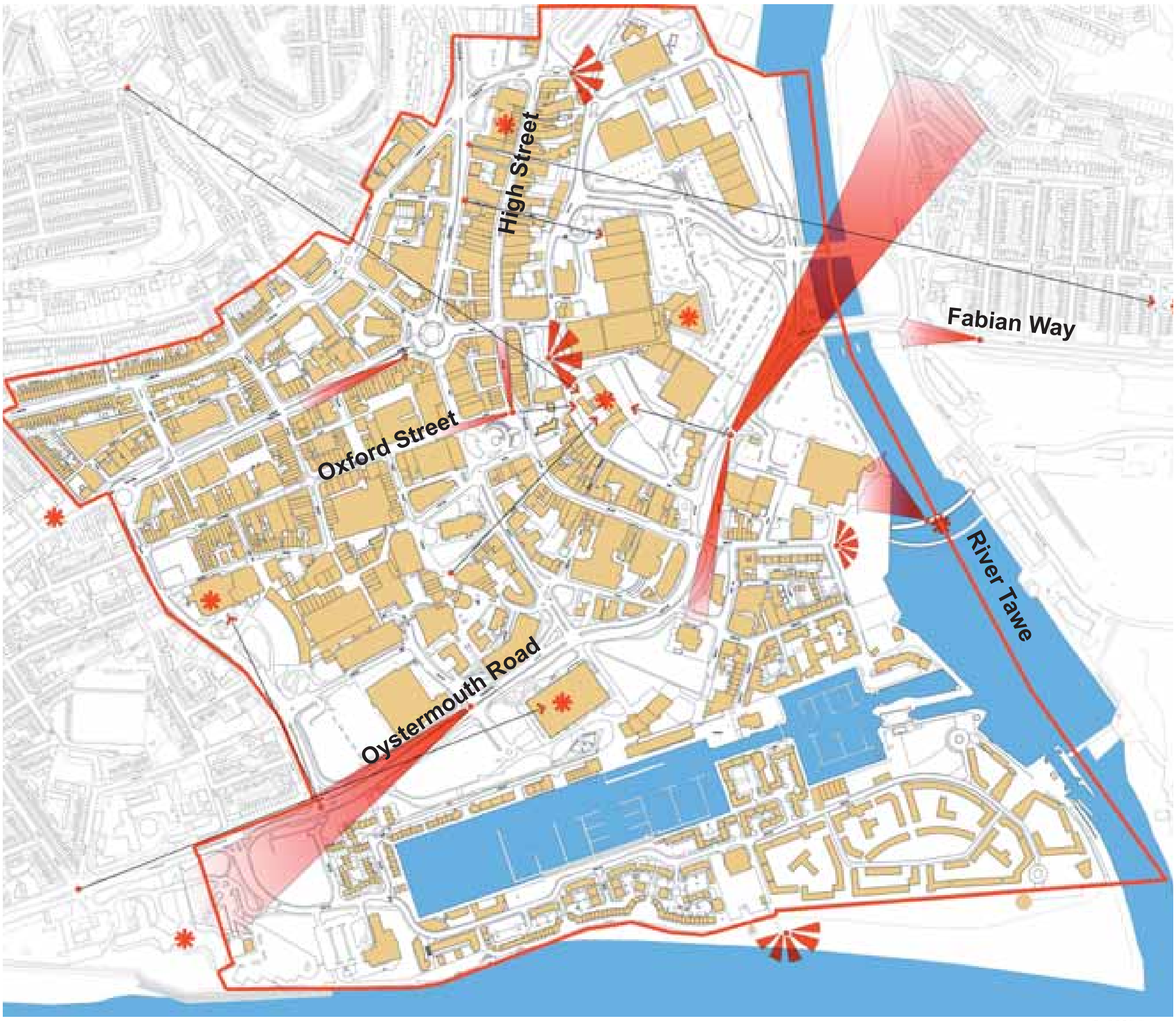


Figure 27 Legibility plan (1:10000 scale)

Key:

Landmark buildings

Panoramas

Vistas of views

Glimpses of views

Figure 28 The footbridge landmark

Quality of the Public Realm

As suggested in the 2004 Swansea Healthcheck, the quality of the public realm plays a vital role in influencing impressions of the City Centre. The public realm is defined by buildings and uses, but can be broken down into the following elements, each of which are discussed below: street furniture, lighting, surface materials, landscape, signage and public art.

Street furniture influences the users of public space and is the most interactive feature in the street. Swansea has clearly invested considerably in its furniture over a period of time. There is a sense of continuity in the colours and forms of furniture in the environs of Oxford Street, however this is of a somewhat standard format and usually not specific to the nature or location of Swansea. Generally, the furniture is kept to the centre of the streets so as not to interfere with the shopping experience, but can still prevent the free flow of pedestrians. The furniture in the northern section of Princess Way is very low quality, unused and an eyesore in a street whose proportion is already too open. The most disappointing areas in Swansea are situated along lengths of the seafront and riverside. There has been no attempt for the furniture to interact with the use, nature and image of the sea (refer to figure).This is one of the reasons the seafront is not working. There are occasions throughout the City Centre, where highway signage style conflicts with furniture, and the preponderance of guardrail does have a negative effect.

Lighting in the City Centre is generally of a good quality. The lamp posts have been removed in Oxford Street in favour of building mounted lights. This frees space at ground level and reduces clutter. Elsewhere, the street lights are of standard format. Again there is no lighting along the seafront promenade to encourage evening use. Some attempt at a seafront theme has been made adjacent to the marina (see figure), yet along Kingsway even this has dated. The Conservation Areas of Wind Street and the Historic Maritime have appropriate low level lantern type light fittings which sit well against the quality building backdrop. The feature lighting is also well handled, specifically at the Castle, Morgan's Hotel and the River Tawe footbridge. If there was a fault here, it would be that not enough feature lighting has been used.

Whilst buildings form a backdrop for the public realm, surface materials are a significant contributor to its quality. The City Centre seems to be suffering from an uncoordinated approach to materials that has created a patchwork quilt effect. There are some areas, recently refurbished with good quality stone, connecting with other materials of different shade, colour, texture, size and shape. A good example is the station plaza. It has had a recent makeover which makes the space a pleasant and interesting one when exiting from the station. This connects to the road hierarchy where standard highway materials have been used (i.e. tarmacadam etc) and the quality stops abruptly. The Oxford Street area has another mismatch of materials creating a confusing public realm (refer to figure). The connecting Castle Square is a high quality space with an interesting connection to the Castle itself (see figure).

As would be expected, the materials used in the Conservation Area of Wind Street are high quality, (see figure) however, at the historic Maritime Quarter area they are generally of a standard or even lower quality (see figure). The area around southern Princess Way seems to have been treated to a good quality range of materials, yet it is questioned where else these materials are used and if they will help to define a character area, or are simply another small area in the patchwork quilt of the City Centre material range.

Planted and green space areas in the City Centre are sparse, with landscaping otherwise limited to car parks and embankments. There are, however, a few notable exceptions in terms of public spaces -

1 Castle Square is the City's most central and prominent space. It steps down from Castle Street and the Castle into the major retail Centre of Oxford Street. There are four plant beds raised above the ground with integral seating. These raised beds do not interfere with the pedestrian desire lines, nor do they detract from legible movement through the space. As a result, the space generally functions well. Central to it is a feature waterfall. This unfortunately reduces the quality of the space as the structure is not well maintained, and it could, therefore, simply be seen as a vandalised barrier. Also, the planting along the north side of the space is another barrier to movement and detaches the building on this side of the square from the space.

2 The entrance to the National Waterfront Museum is of high quality. This entrance has recently been planted but is a well considered space providing areas for lounging and relaxing in front of the museum. However, it is located between the Leisure Centre and Swansea Museum, both of which back on to it, and it is essentially a 'walk-through' as opposed to 'walk to' space. Now that the museum has opened, and once the Leisure Centre is refurbished, this will be a well used space despite the inactive edges, and future improvements should seek to encourage more activity.

3 The marinas have a certain quality due to the focus provided by the historic docks around which they are built. Generally hard landscaped to reflect the nature of the space and their historic use, the marinas are a fantastic amenity which could become a hub of activity through proper use.

4 Museum Green is a recently landscaped public space critical to the movement of pedestrians from the core area to the historic Maritime area and riverfront. It is seen as one of the most important spaces in Swansea.

The statutory requirements for highway signage means that there is a multitude of highway signs littering the streetscape. These can be consolidated with careful thought. Ironically, on the High Street, there are banners to introduce visitors to the fact that Swansea is a seaside resort but there are no vistas to the waterfront.

Public Art is often seen as an add-on to a development or public enhancement, but can make a significant statement regarding a city centre. Swansea has a tradition of public art and has a few interesting pieces which genuinely contribute to the image of the City. One of these is the Police sign on Alexandra Road (figure). Another is the Glass shard topping the fountain in Castle Square. It encourages thought into the use of glass and how it is connected to the history of Swansea.

The plan on the previous page indicating positive and negative public spaces demonstrates that there are only a handful of areas with satisfactory large scale public space in the City. This implies that the rest of the City requires a completely fresh approach and substantial investment in the public realm. It also indicates that in areas where redevelopment can take place there is the opportunity for new public spaces linking together.

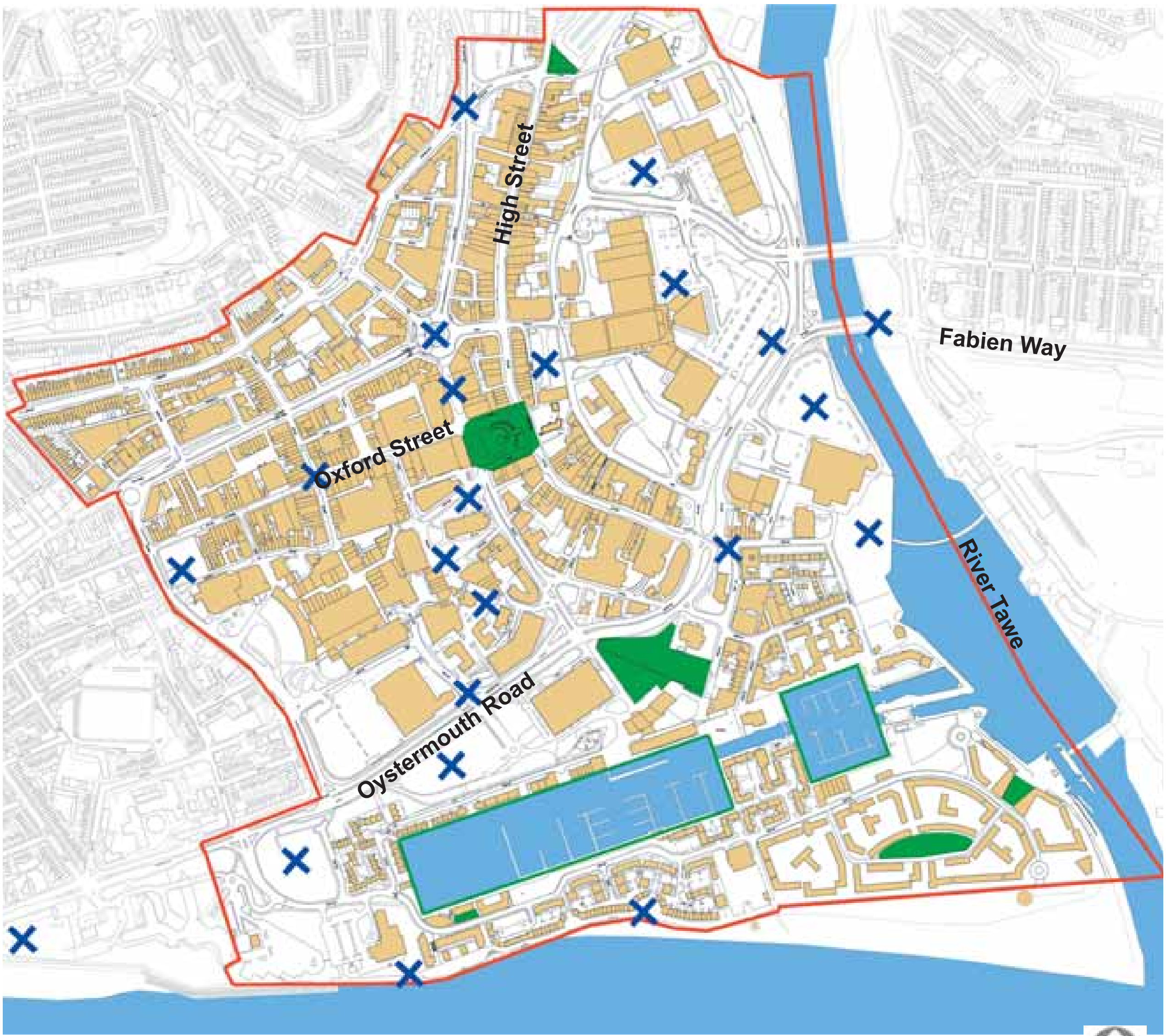


Figure 31 Positive and negative public space plan (1:10000 scale)

Key:

High quality spaces

Poor quality spaces

Figure 32 Lighting at the marina seafront


Figure 33 Materials at Oxford Street


Figure 34 Linkage between the Castle and Sq.

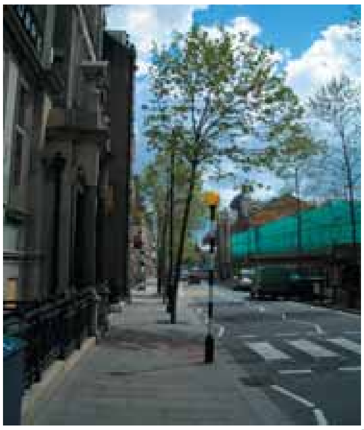


Figure 35 Materials at Wind Street


Figure 36 Materials at the Historic Maritime


Figure 37 Art on Alexandra Road


Figures 38-40 Art at the marina

ExistingTall Building Study

The plan opposite shows that Swansea is predominantly three to four storeys with occasional taller buildings. This scale is indicative of larger market towns rather than regional cities.

Tall buildings work well to improve legibility and promote an image of the place. Swansea's tall buildings do not do this. The majority of the taller buildings are tired looking or concrete structures which contribute little to Swansea's image. There is no cohesive structure to the location of the buildings (i.e. clusters of taller buildings become a magnet for movement and interest). The buildings do not correspond with important vistas, sit appropriately in a panorama or even highlight the location of an important place.

The tallest buildings in Swansea are the BT building and Alexandra House. These stand at approximately fourteen storeys. They are separated with the BT sat between Park Tawe and the Castle and the Alexandra House close to the railway station. The BT building forms the backdrop to the Castle when viewed from Castle Square. This contrast in styles could be argued to create an interesting juxtaposition of styles, however, the BT building is too imposing in height and form so close to a scheduled ancient monument. The there building over ten storeys is the nineteen sixties/ seventies office on lower Princess Way. This is a poor building on all accounts and negatively affects the setting of St. Mary's Church, Crosskeys public house and lowers the environmental quality of an important north-south route.

The less tall buildings between seven and ten storeys are also offices. These, whilst not being of good quality, are not detrimental to the environment around them as these areas are generally poor in streetscape terms. The one deviation from this is the nine storey residential building to the marina. It is sat in a good location at the end of the marina development and forms a landmark into the maritime quarter. It is also of residential and maritime character and a good addition to the townscape.

There are numerous buildings of five and six storeys dispersed around the City. Generally though, there are not enough buildings of this height to transform the image of Swansea from a town into city scale. This is one of Swansea's main failings, it's physical scale does not currently live up to it's aspirations.


Figures 41/42 The BT building

Figure 43 Alexandra House

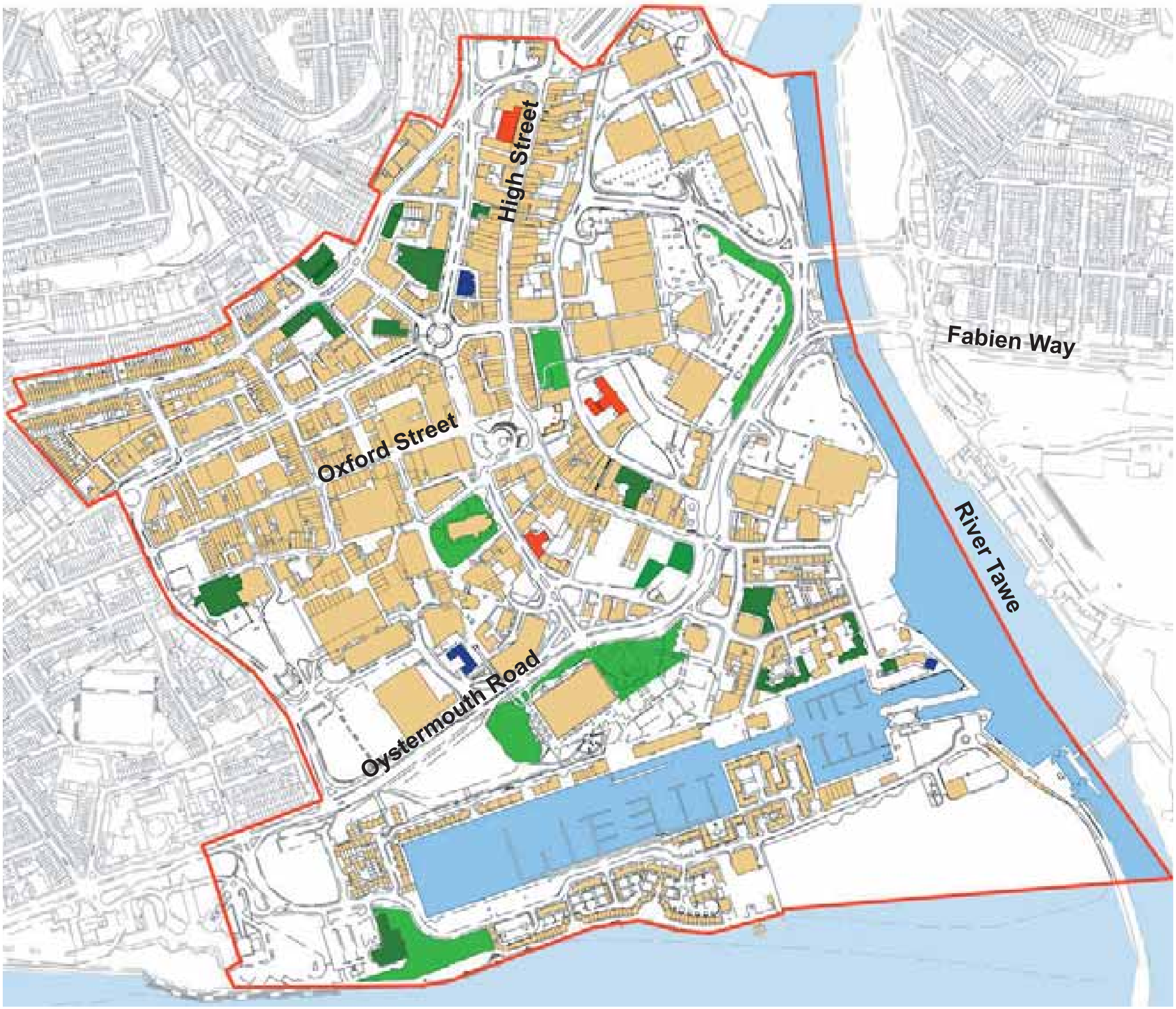


Figure 44 Tall building plan (1:10000 scale)

Key:

- Buildings 10+ storeys
- Buildings 7-9 storeys
- Buildings 5-6 storeys

Figure 45 The Grand Theatre

Figure 46 Bland office building

Figure 47 Waterfront living

Strategic Views towards the City Centre

There are three important views of the City Centre from which its various envronmental, topographical and aesthetic qualities can be determined. These are: looking south west from St. Thomas hillside; looking south from Townhill, and; looking north east from the Mumbles peninsula.

The view from St.Thomas captures the magnificent sweep of the peninsula as it extends round to Mumbles. It captures the SA1 area, maritime and River Tawe before rising slowly towards the City Centre core. This view currently shows a trilogy of taller landmarks. Firstly the BT building, secondly, the maritime residential building, and thirdly All Saint's Church in St. Thomas.

The view from Townhill looks directly down slope over the City Centre and towards the Port Talbot Steelworks. As the view of the City is at an oblique angle, the taller buildings at set against the general mele of the townscape and as such become less important landmarks. The main issue with this view is the seafront edge and the prominence of the Tawe valley as it interacts with the Centre.

The view from the Mumbles highlights the importance of the view along the Tawe valley. The BT building and Alexandra House are prominent on the skyline between the two hillsides. This view will become the benchmark for the locations of tall buildings in Swansea.

Figure 48 View A: Panorama from St. Thomas

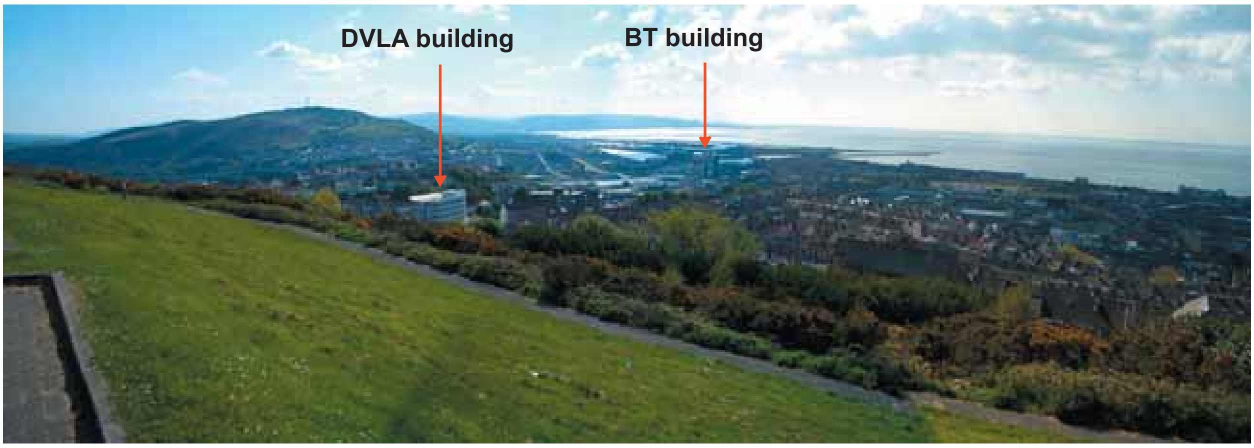


Figure 49 View B: Panorama from Townhill

Figure 50 Plan of strategic view locations (nts)

Figure 51 View C: View from Mumbles seafront

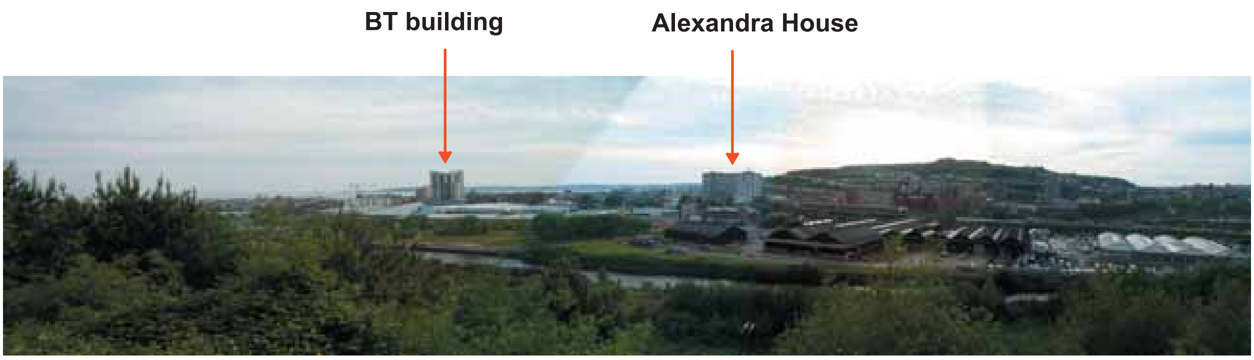


Figure 52 View D: View from the Tawe valley

Current Planning Applications and Enquiries

1. Tesco retail extension
2. Redevelopment of bus station
3. Salubrious Place phase 1 - mixed use development
4. Salubrious Place phase 2 - mixed use development
5. Conversion of school into arts complex
6. 1-7 Princess Way - a 7 storey mixed use development
7. Princess Way strategic link - arts project
8. Demolition of Uniflock building
9. Vetch redevelopment
10. New department store development
11. Seagate/Ferrarra Quay - high density residential/commercial development
12. National Waterfront Museum development
13. Refurbishment of the leisure centre
14. Swansea Point - mixed use development
15. SA1 Swansea Waterfront - mixed use development
16. Old Police Station into arts centre development
17. High Street Urban Village - retail/residential development
18. St.Thomas Station into residential
19. Urban loft development

Other sites for consideration:

20. The station gateway potential site
21. The DLVLA site
22. The Park Tawe area
23. Wind Street infil site
24. Partial redevelopment of the retail core
25. Oxford Street infil sites
26. Princess Way node
27. Extension of the Civic Centre
28. Car park sites along Oystermouth Road
29. Dunvant Place car parks
30. River Tawe car park site


Figure 53 SA1 area


Figure 54 The Salubrious Place development

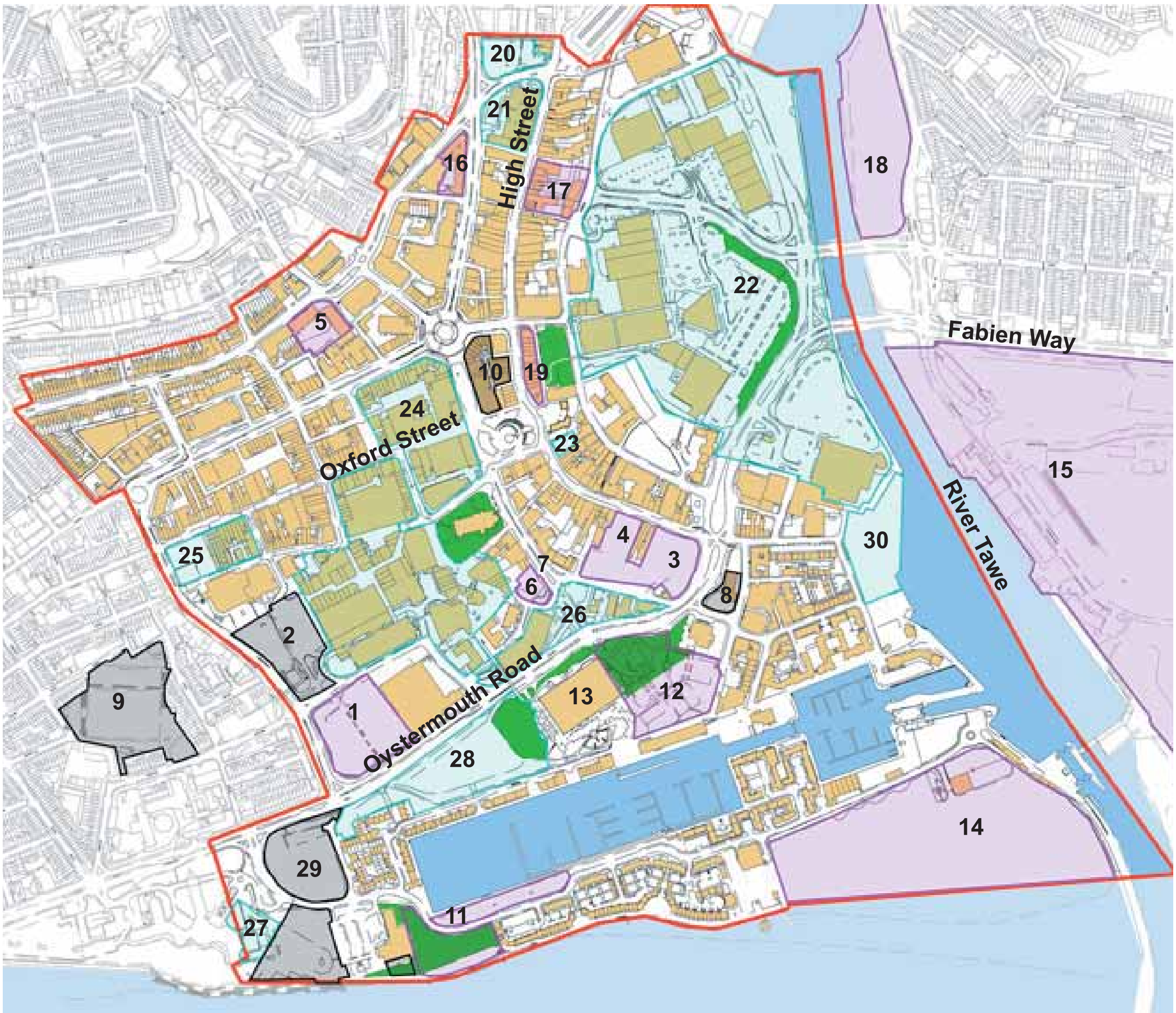


Figure 55 Development sites plan (1:10000 scale)

Key:

Site with developer interest

Sites submitted for planning/received consent

Potential development sites

Figure 56 The Stadium redevelopment

Figure 57 A department store?

6 POTENTIAL DEVELOPMENT SITES

The Baseline Report highlighted the number of sites currently under consideration for development in the City Centre. Of the future development sites highlighted, their nature have been further considered and the potential are defined below:

A **Princess Way Buildings (retail/residential)**
This block represents a hugley important site in terms of the future regeneration potential of Swansea City Centre. It is centrally focussed, opposite the City's most important historic monument, adjacent to the City's premier public space and with the correct density will begin a retail rennaissance in the immediate surroundings.

B **Dunvant Place car park (leisure/hotel/retail/residential)**
The last remaining seafront site available on the periphery of the City Centre. Adjacent to the County Hall and the Marriott Hotel, the site should be a lynchpin in generating strong pedestrian flow from the City Centre out to the seafont. This site holds the key to the leisure regeneration of the beach and improving the tourist potential of the City.

C **The River Tawe car park (office/leisure)**
The many subterranean constraints have prevented this site from being developed. A key pedestrian link from the SA1 area into the City Centre. The site should have a strong civic presence together with leisure activities to make better use of the River's leisure potential.

D **Oystermouth Road car parks (culture/residential/hotel)**
The car park is another site on the route from the city centre towards Dunvant Place. This is an opportunity to begin the regeneration of the dualled carriageway from a road into an urban place with positive buildings and a green environment.

E **St Davids Centre (retail/residential)**
The site is indicated as soft as it fails as a shooping centre and requires urgent attention to stop the decline of retail in Swansea.

F **The station Gateway (hotel/transport/civic/residential)**
These two sites of soft and hard potential form the gateway into Swansea. The initial impression of the City is presented here. The gateway to the second City of Wales should be bold yet inviting.

G **The City Centre (retail/residential/office)**
The site is highlighted at the primary external retail centre of Swansea. Considerable measures need to be taken to prevent the decline of retail. Once the softer areas of Princess Way and St. Davids have begun, the main priority is to draw in the range of retail offer a City such as Swansea should have.

H **Parc Tawe (retail/residential/office/leisure/community)**
This is the largest area highlighted for potential development. The site is central in the City yet it turns its back to the centre. The site does not respond to the other major asset, the River Tawe. This needs to become part of the Swansea experience reconnecting the Centre with the River.

J **Tesco site (retail/residential/hotel)**
This site sits between the City Centre and the final remaining undeveloped strip of land along the seafront at its periphery. The site is important in improving the linkages across Oystermouth Road.

K **South Princess Way (culture/residential/hotel)**
The environment around this road is dominated by vehicles. Large access points, multistorey car parks and overengineered junctions make for an uninviting entrance to the City Centre.

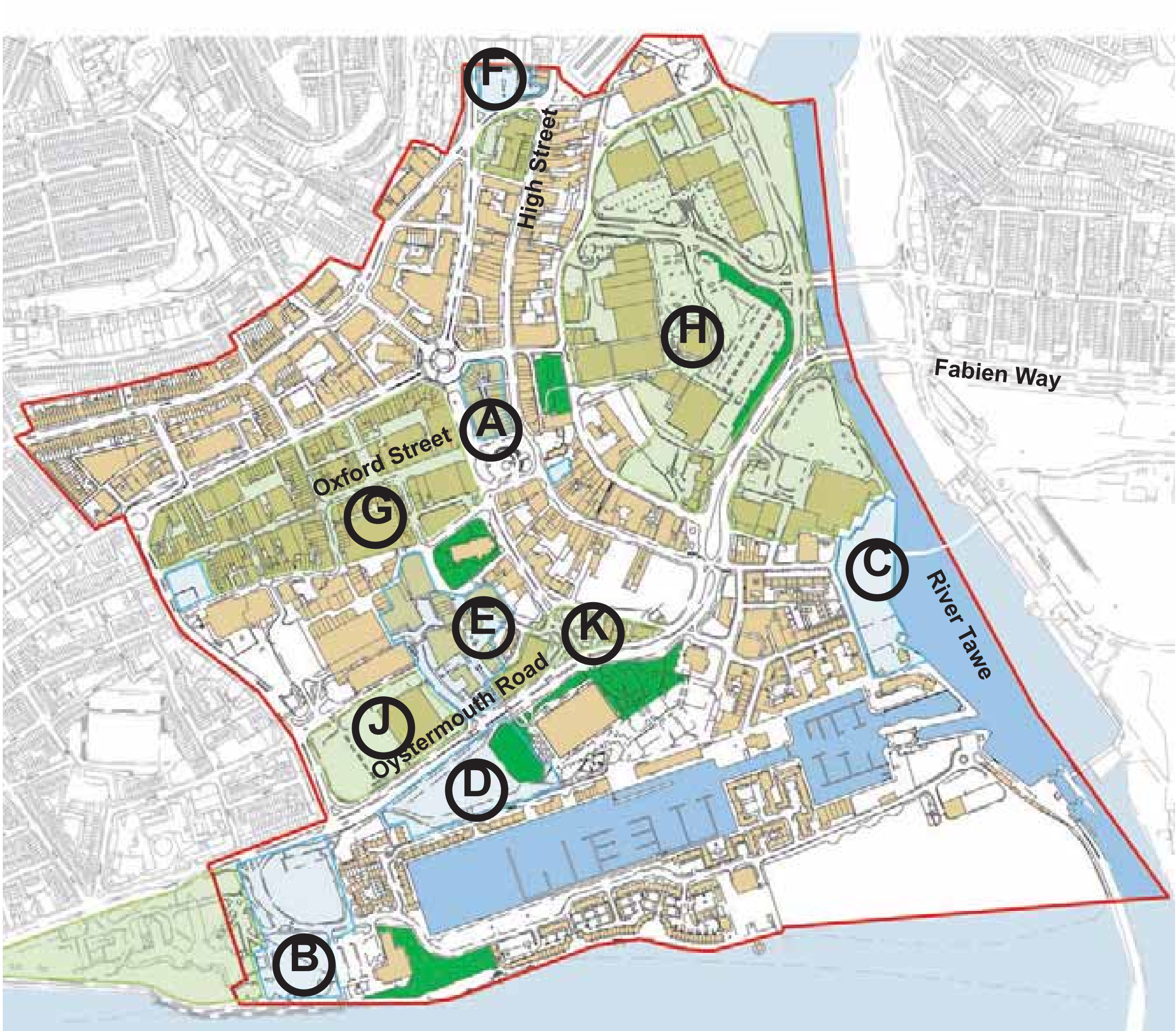


Figure 58 Future development sites (1:10000 scale)

Key:

Soft development sites

Hard development sites

7 ISSUES IN THE CITY

The stage 1a Baseline Report details the specific physical issues with the City of Swansea. Many of these issues can be condensed into a few major issues or constraints which will need to be dealt with before the regeneration of Swansea is accomplished. The issues, highlighted below, are both constraints (such as the dislocation of public transport) which are more difficult to solve, and difficult situations (such as the nature of Oystermouth Road).

There are two other issues, not highlighted here as they affect the entire City. The first is that of scale. The building heights are those of between two and four storeys in the City Centre. This is reflective of a large town. In order to achieve a true renaissance the density needs to increase. The other city wide issue is the nature and location of tall buildings. These help to define the character of Swansea. Currently there is a dispersed array of locations and aesthetic which negatively affects the image of the City.

The other major issues are:

A **Victoria Road/Oystermouth Road**
Heavy traffic is a deterrent to movement. The route also contains major subterranean services. These constraints and the general environement along the route form the biggest visual deterrent to stopping in Swansea.

B **The Strand escarpment**
This escarpment is a major physical barrier. Although it presents an interesting skyline, particularly from the east, and affords good views from the north, the escarpment prevents easy and reasonable access east west into the City Centre, particularly for vehicles.

C **Parc Tawe**
The nature of Parc Tawe, from its use, layout, design and location is deterimental to the future development of Swansea.

D **The City Centre**
The lack of retail choice and experience is a constraint to the City. This is the reason out of town retail parks are thriving. The City has much to offer, this needs to be harnessed in the Centre to prevent the slow downfall of the retail core.

E **The County Hall and Guildhall**
The civic functions of the Swansea are on the periphery of the City Centre. With the major barrier of Oystermouth Road preventing reasonable movement between the two, Swansea has lost another function of its Centre to the edge. This only increases the sence of loss and lack of identity in the Centre.

F **Dislocation of public transport hubs**
In a City with many of its services around the fringes, the public transport network needs to be fast and efficient. The bus station is well used, however, the interaction between trains and buses makes travel between two points an arduous task. This only discourages use of public transport. Potentially Futurebus is a solution to be welcomed.

G **The southern marina**
This area has fantastic aspect for the residents. Access to a good beachfront and surrounding by water. Unfortunately, there is nothing to attract any other member of the public, particularly not the tourists. There are no facilities for leisure or tourism which renders a large section of the seafront unusable for the majority of Swansea's population and visitors.

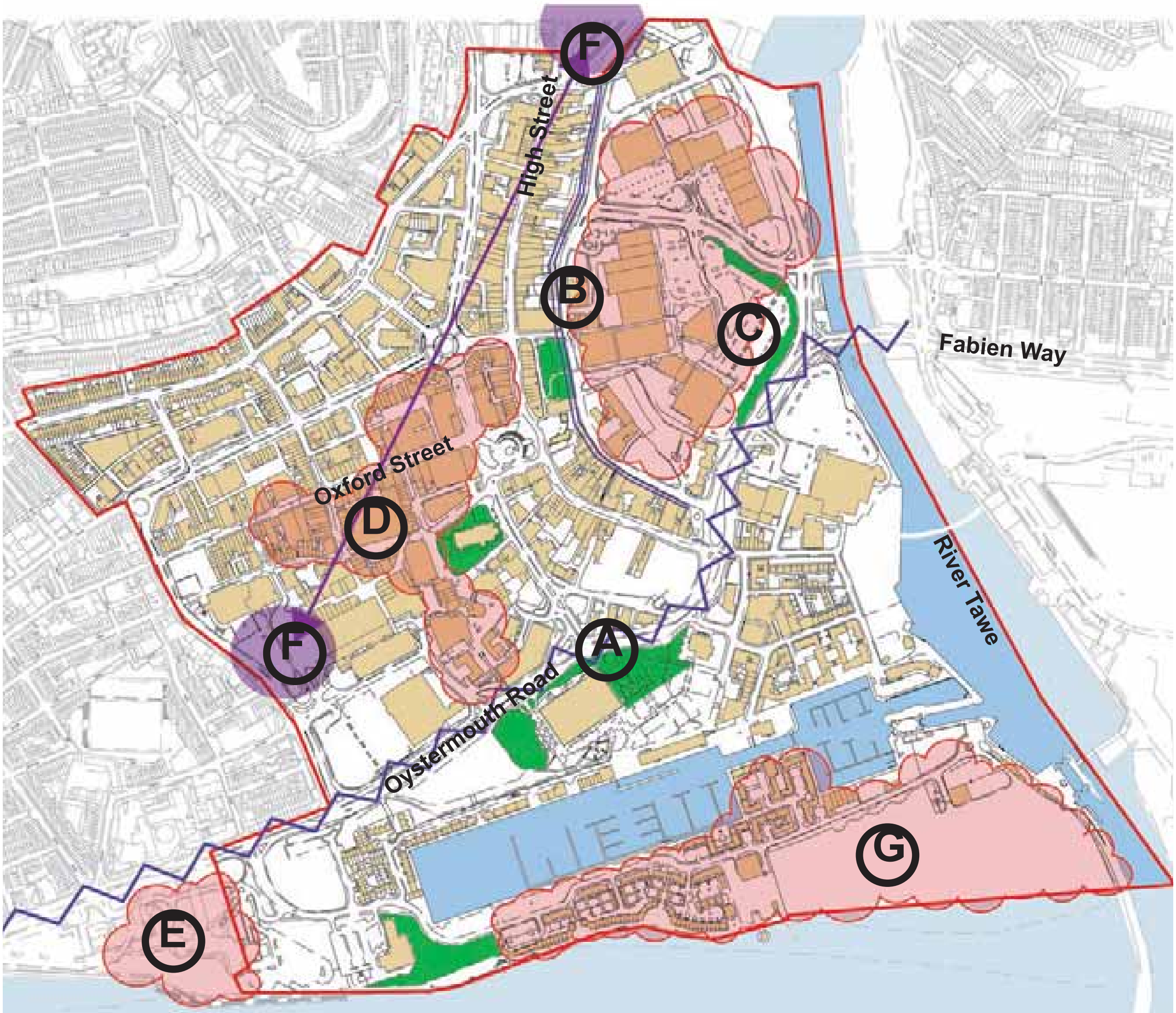


Figure 59 Issues diagram (1:10000 scale)

Key:

- Site constraints
- Access/barrier constraints
- Location constraints
- Physical barrier constraints
- Proximity constraints

8 OPPORTUNITIES IN THE CITY

In order to define a clear, flexible and achievable vision for Swansea the main opportunities need to have been determined. These opportunities represent the significant development sites, their linkages and relationship to each other and Swansea's existing fabric.

Castle Square
There is the opportunity to turn the Castle Square from a meeting space to an events place. This square can indeed become the central focus of the City.

Oystermouth Road/Victoria Road
A The City Promenade. There is an enormous amount of space along the fringes of the road. These spaces should be contained within a comprehensive strategy to change the nature of the road from a duelled carriageway into an urban street with different, interesting spaces connected to it which
B respond to the character of the district within which they lie. This street could become an artery, not simply a vein and reconnect Swansea with its waterfront.

The retail core
Complimenting the Castle Square and Historic setting of the Castle, the retail core has the potential to regenerate the City, improve the built stock, add interest, vitality and identity back into the heart of Swansea.

C **The Waterfront Museum and leisure centre**
These buildings, once completed form visual landmarks along the passage through the City. Connecting Castle Square along Princess Way, the route passes two churches and forms a cultural linkage out from the core area. From these buildings a rich and interesting built heritage is adjacent.

D **Dunvant Place**
The area, adjacent to County Hall, is connected to the civic function of the CIty. It is also an opportunity to explore the playful nature of swansea as a tourist destination. Next to the seafront, the site is ripe for connecting the City Centre with the sea in a vigorous and exciting manner.

E **The River Tawe**
For too long the River and its connecting spaces have been dominated by industrial or unresponsive uses. The River represents an opportunity to improve the interaction between people and nature. The exploration and activity focus linked to the marina and harbour could see the River giving
F something back to the City. The car park site is the opprtunity to begin this interaction.

Parc Tawe
As its name suggests, this site is an opportunity to connect in a more interesting fashion the City Centre and the River Tawe. Partially developed, partially freed up for a proper experience of the Riverside. The lack of green spaces withing the CIty Centre could be resolved in this area.

G

B.6 These opportunities form an arc of development potential in Swansea. Each with interesting features, identities, uses and experiences. These would give swansea its identity, heart and respect.

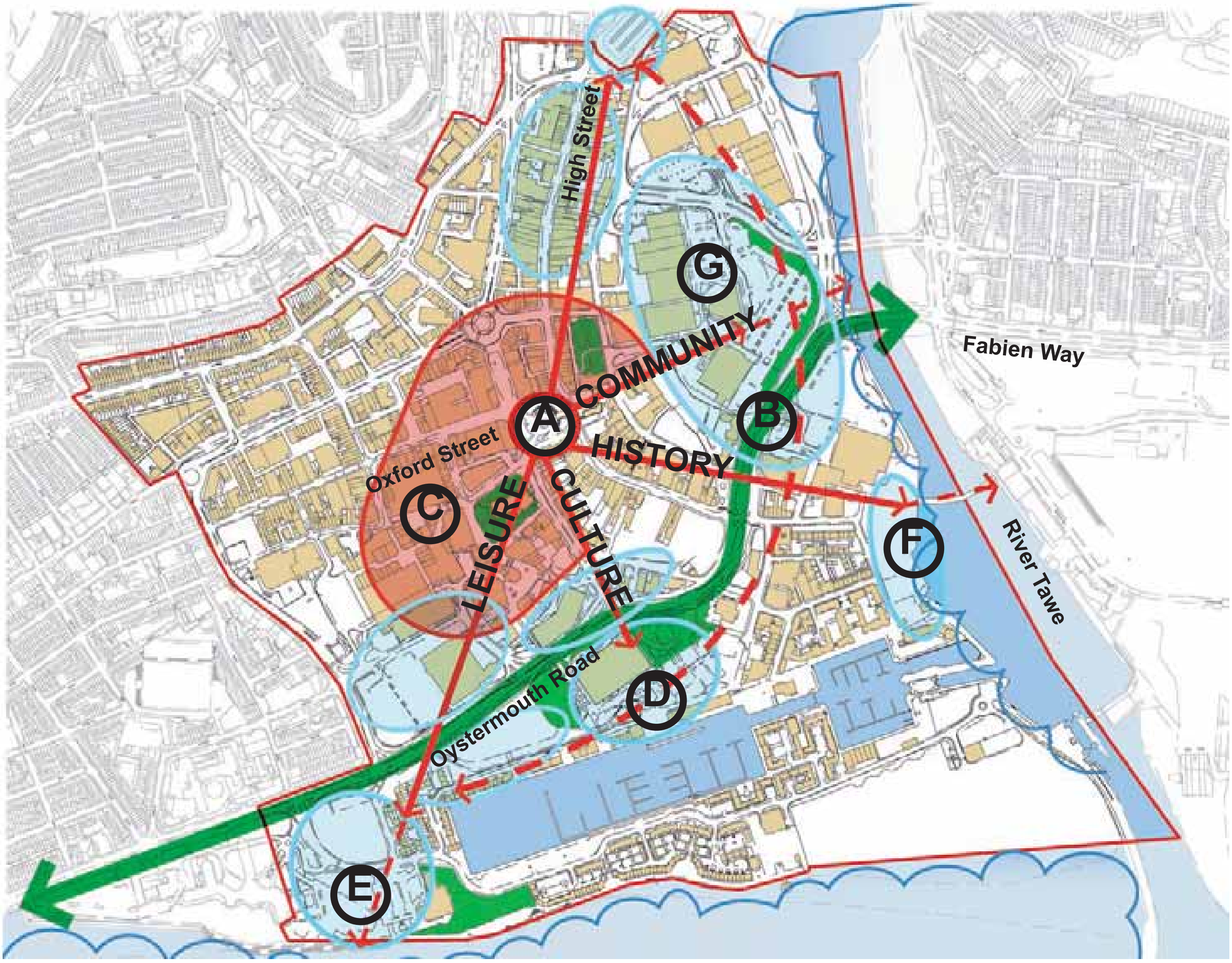


Figure 60 Opportunity diagram (1:10000 scale)

Key:

- Major road improvement potential
- The playful edge of the city
- Connecting routes through interesting spaces
- Destinations of identity
- The link between the sites

9 A VISION FOR SWANSEA BAY

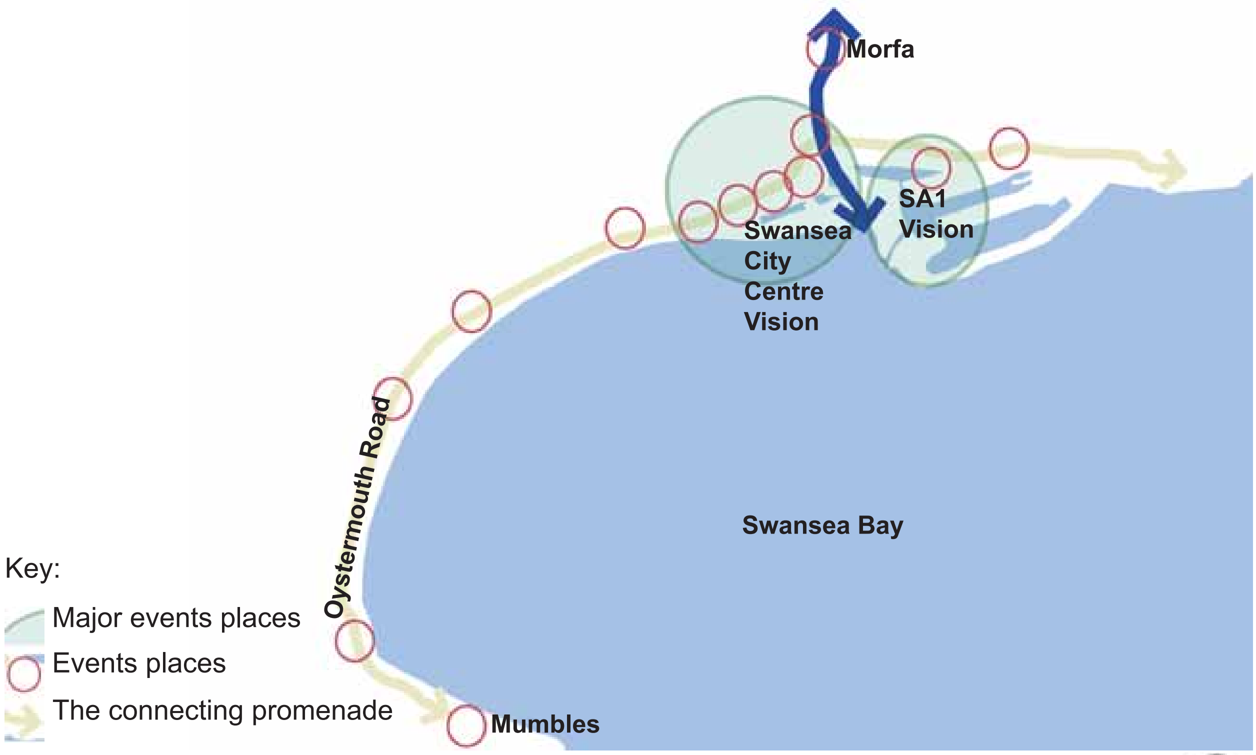


Figure B.5 The Swansea Bay Vision

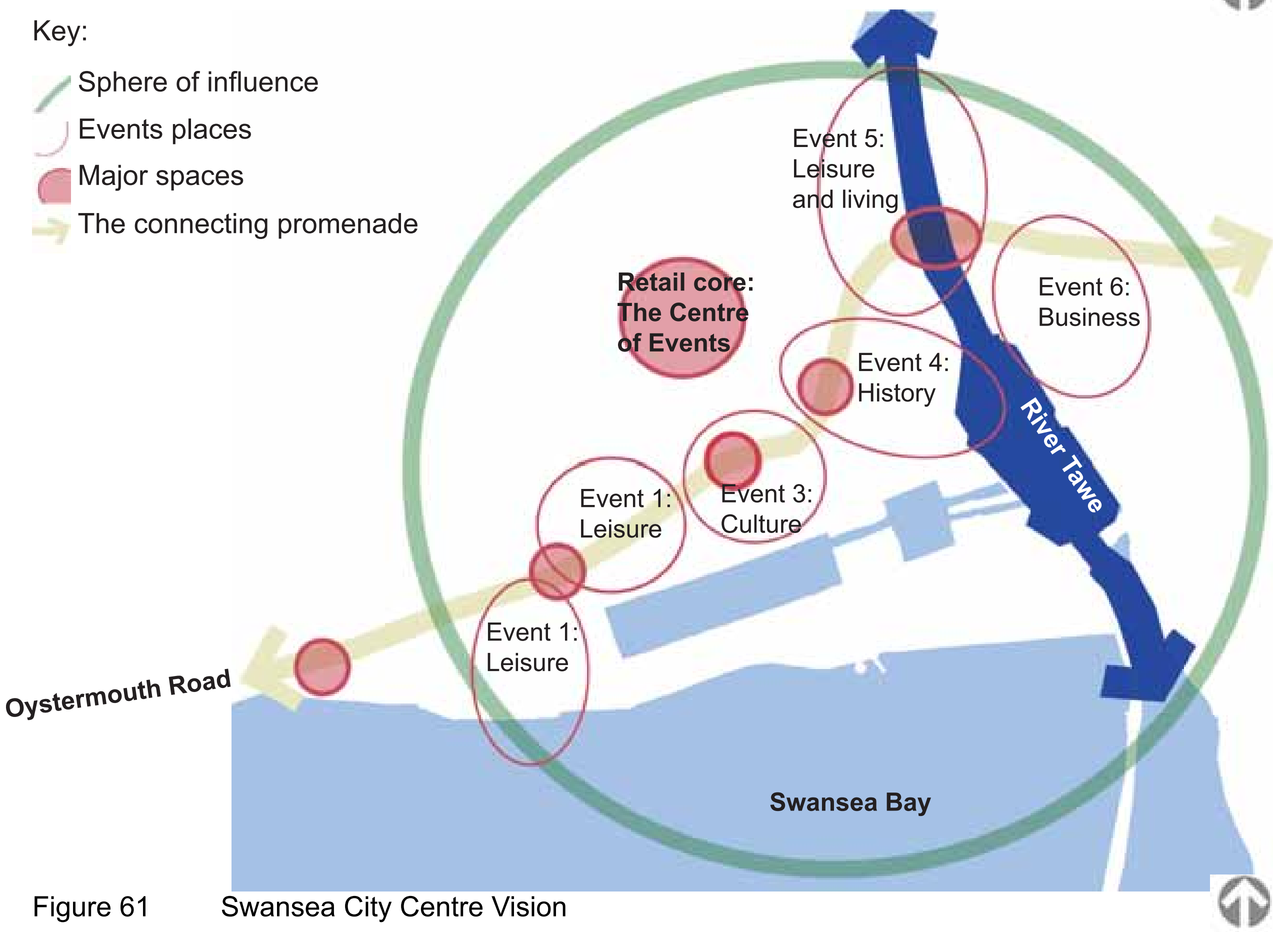


Figure 61 Swansea City Centre Vision

The Swansea bay encompasses the metropolitan area of Swansea together with the beautifual seaside resort of Mumbles and the heavy industrial town of Port Talbot. Although, three polar places in terms of scale and environment, they all lie on the same stretch of coastline.

The coastline, south facing, is a tremendous amenity to be experienced. This experience can be in the nature of events lined along the Oystermouth Road Promenade. The events grow in intensity towards the City of Swansea...

'A distinctive European Waterfront City...'

Swansea will be a City filled with events. A concentrated ensemble of variety arranged around a distinctive waterfront.

The City will encompass this waterfront by:

- creating a high quality, publically accessible waterfront which changes in use, nature and character as it winds around the Bay and into the River Tawe
- developing modern, high quality buildings at key locations to raise the profile, legibility and identity of Swansea City Centre
- introducing a diverse, mixed, high quality range of activities, particularly shops, offices, housing, leisure/cultural activities, public services, hotels and business services
- creating a modern transport infrastructure including new bus station, improved rail services, modern public transport services for the City Centre and links to other key locations
- improving the diversity and quality range of modern shops together with a central market focussing on local produce

...building on its natural assets to enliven, encourage and enable the experience of a true waterfront City in an interesting and contemporary manner.

Swansea City Centre: Strategic Framework

Technical Appendix 3: PHYSICAL STRUCTURE AND URBAN DESIGN ISSUES

3.2 Option Analysis

BDP

1 A VISION FOR SWANSEA CITY

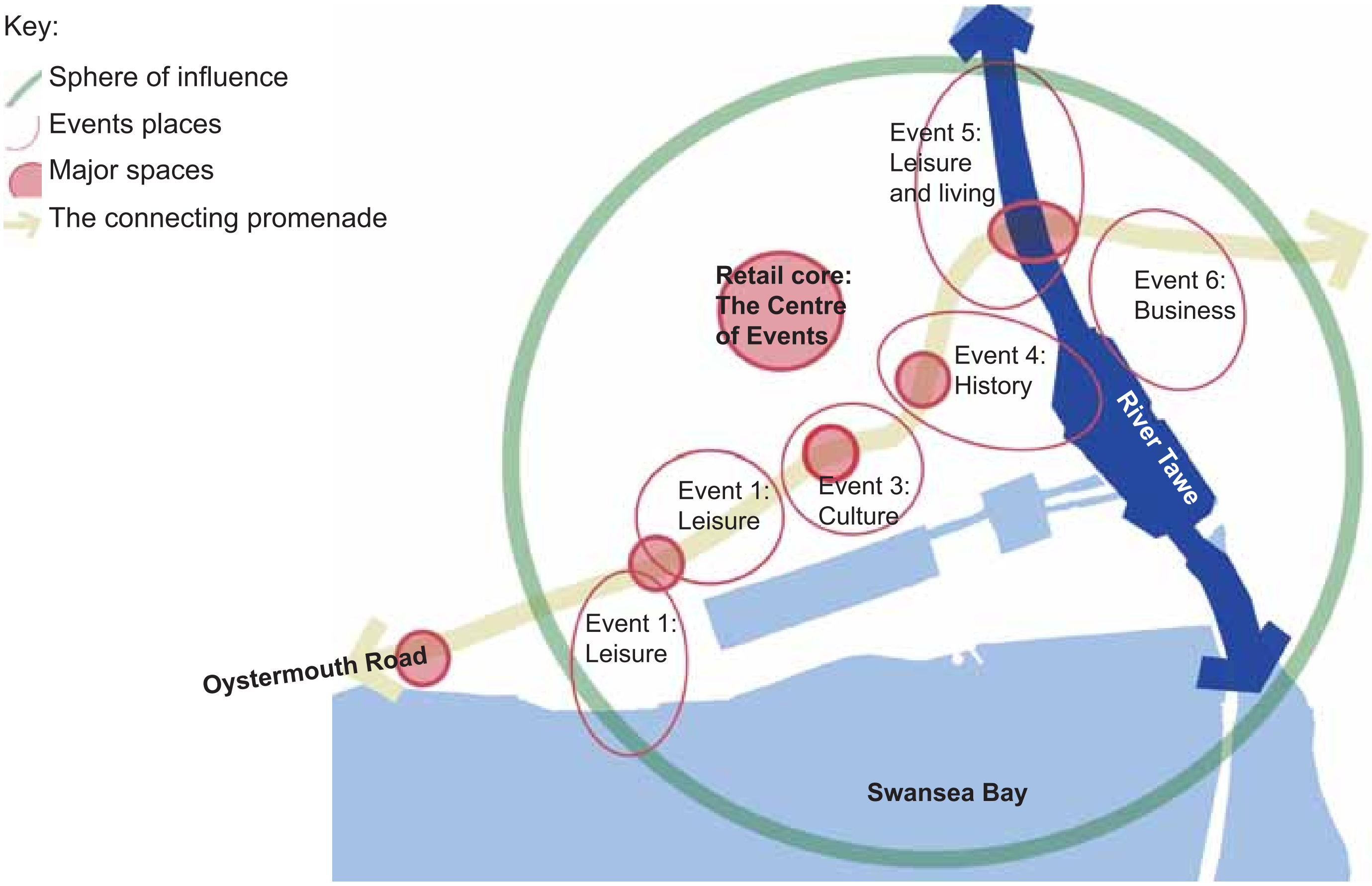


Figure 1 Swansea City Centre Vision

Figure 2 Event spaces - Madrid

Figure 3 Manchester

Swansea will be a City filled with events. A concentrated ensemble of variety arranged around a distinctive waterfront.

The City will encompass this waterfront by:

- creating a high quality, publically accessible waterfront which changes in use, nature and character as it winds around the Bay and into the River Tawe
- developing modern, high quality buildings at key locations to raise the profile, legibility and identity of Swansea City Centre
- introducing a diverse, mixed, high quality range of activities, particularly shops, offices, housing, leisure/cultural activities, public services, hotels and business services
- creating a modern transport infrastructure including new bus station, improved rail services, modern public transport services for the City Centre and links to other key locations
- improving the diversity and quality range of modern shops together with a central market focussing on local produce

“A vibrant, exciting, attractive, sustainable, cultured European Waterfront City Centre, attracting businesses and visitors, driving the economy and enhancing the quality of life of residents of Swansea and South West Wales.”


Figure 4 Barcelona

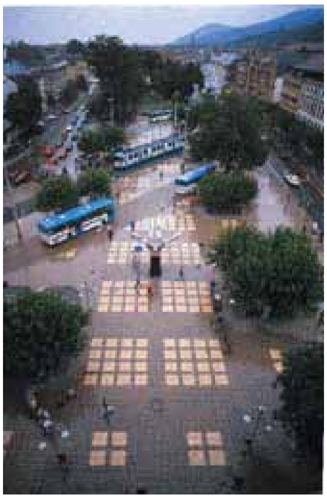


Figure 5 Heidleberg


Figure 6 Catanzaro

2 PRIORITY SITES FOR OPTION APPRAISAL

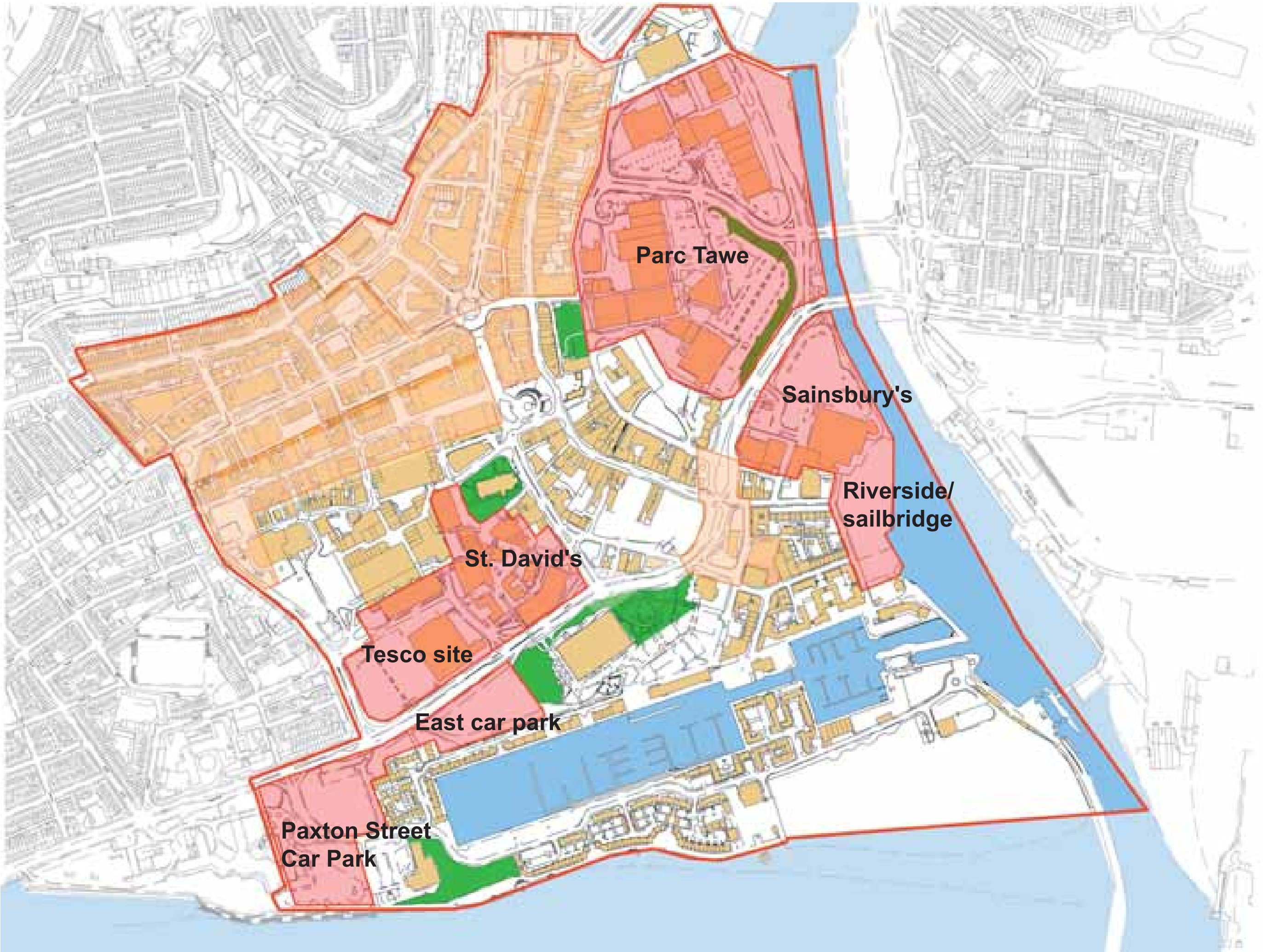


Figure 7 Priority sites

Key:

Priority sites

Important sites

Figure 8 Priority sites: Parc Tawe

Figure 9 Riverside/Sailbridge

Parc Tawe site (17 Ha)

Option 1: New retail warehouse district and supermarket with improved River Tawe waterfront

Option 2: Reconfigured retail warehouse district with improved River Tawe waterfront

Option 3: Residential led, mixed use waterfront development with eating and drinking, anchored by a supermarket

Option 4: New integrated retail centre, eating and drinking with high density residential along improved River Tawe waterfront

Sainsbury's/Riverside/Sailbridge sites (5.3 Ha)

All options: Small scale residential, leisure, eating and drinking uses

St. David's/Tesco sites (5.52 Ha)

Option1: Existing Tesco with anchor store attached and Market in existing location

Option 2: Reconfigured Tesco and relocated Market with two anchor stores between

Option 3: Relocated Tesco and existing Market retained with A1 retail loop and a strong link to Paxton Street

Option 4: Relocated Tesco and Market with A1 retail loop and increased retail provision around St. David's

East/Paxton Street car park sites (6.4 Ha)

Option: Mixed use leisure and commercial World Trade Centre with retail and leisure facilities

The options

These separate options for each site are in part dependant on each other. Therefore the next few pages are intended to inform the reader how the options might read as an entire City Centre redevelopment.

They centre around two main issues. Firstly the location of the major supermarkets in the City Centre, and secondly where the main retail anchor stores are located.

Figure 10 St David's

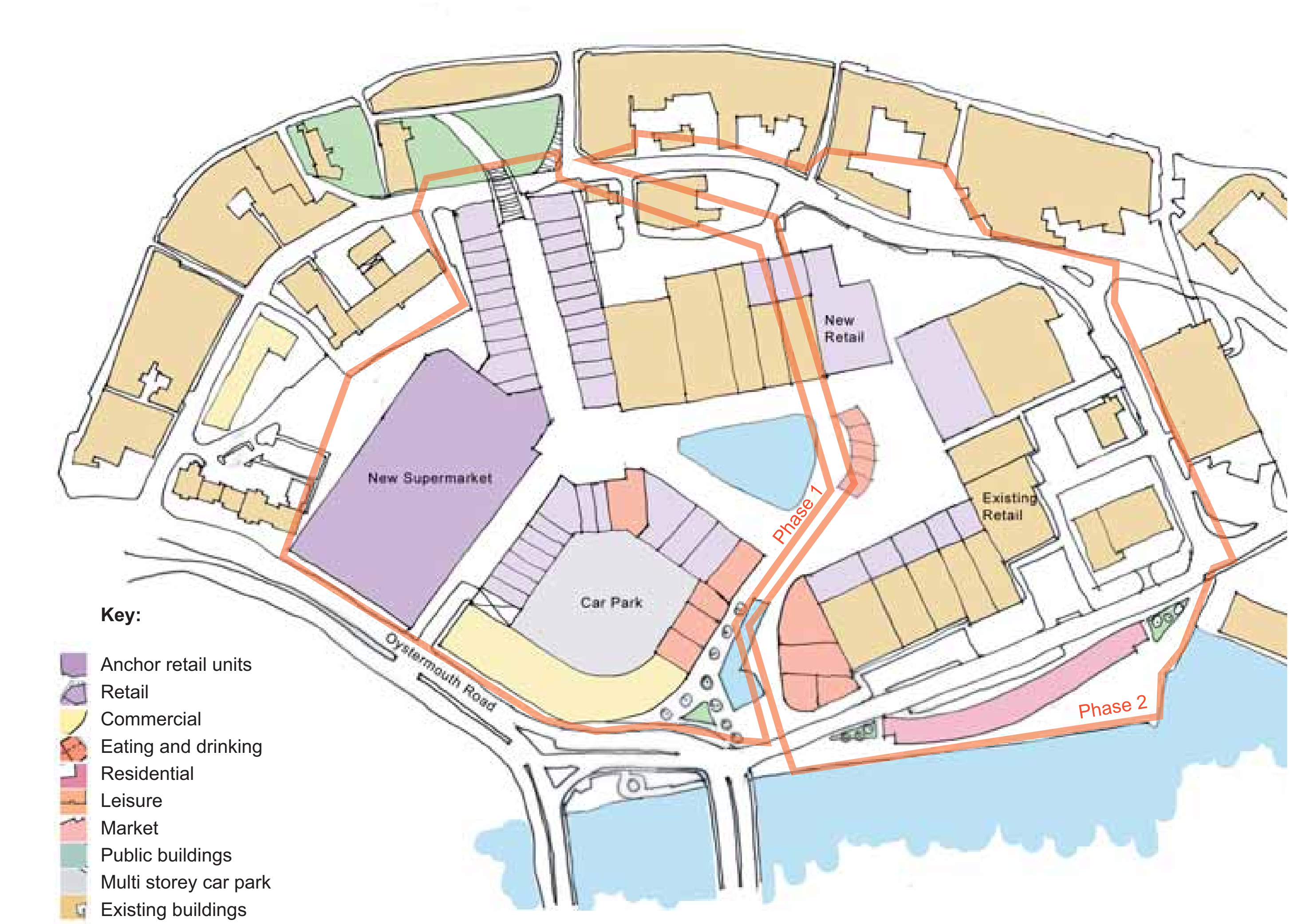
Figure 11 Tesco

Figure 12 Paxton Street/East car parks

Parc Tawe Site (17 Ha)

Option 1: New fashion retail district with improved River Tawe waterfront

Parc Tawe Option 1 (phase 1)			(phase 2)	
	Total floor area (sqm)	Number of units	Total floor area (sqm)	Number of units
Supermarket				
Retail Anchor	21500			
Retail	14600			
A3	3900		2400	
Commercial	42400			
Residential	35200	460	103600	1355
Car Park	33600	1344		

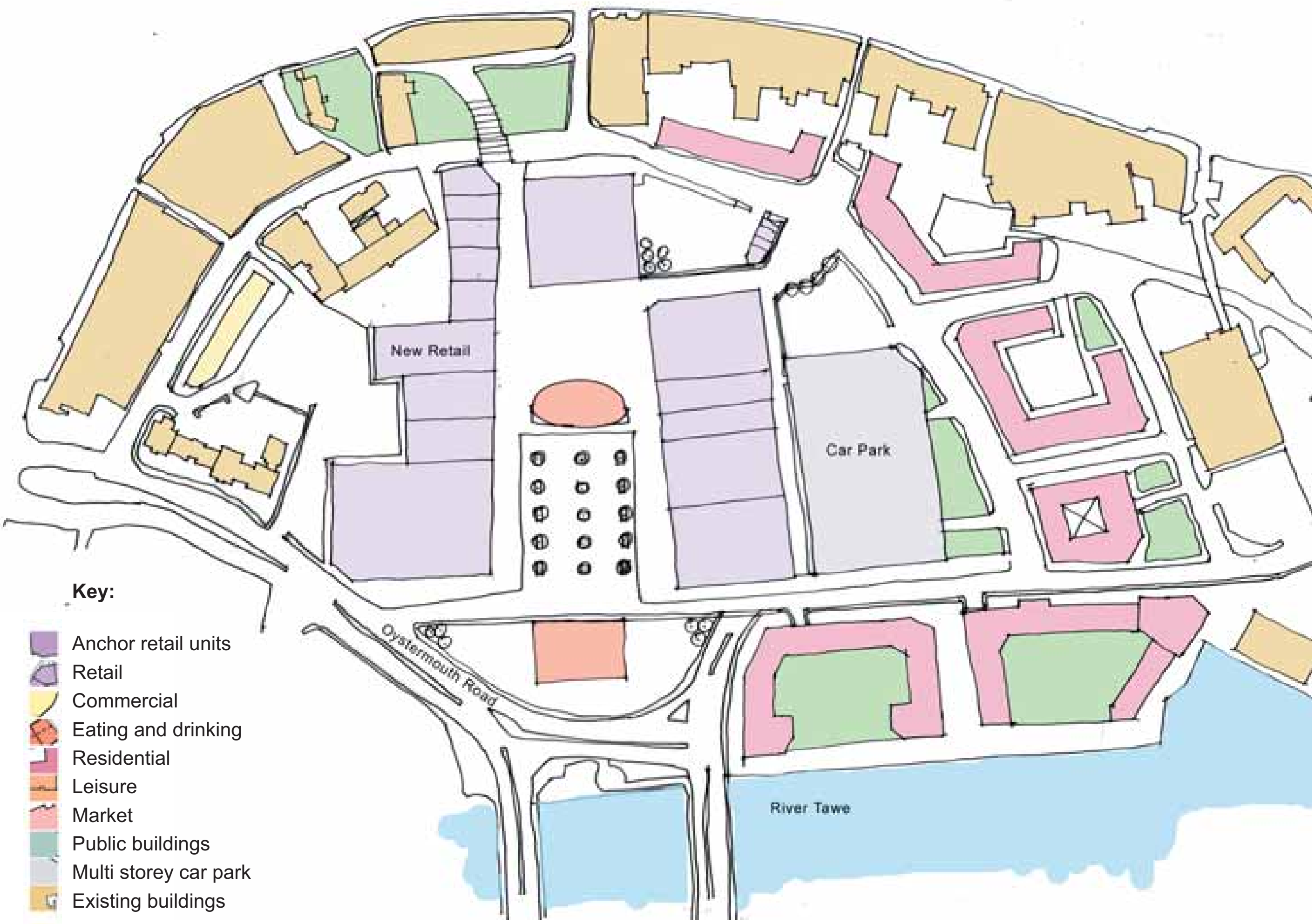


Option 2: Reconfigured retail warehouse district with improved River Tawe waterfront

Parc Tawe Option 2 (phase 1)			(phase 2)	
	Total floor area (sqm)	Number of units	Total floor area (sqm)	Number of units
Supermarket	12000			
Retail Anchor				
Retail	20900		15900	
A3	2600		2500	
Commercial	42000			
Residential			12000	157
Car Park	43000	1720		

Option 3: Residential led, mixed use waterfront development with eating and drinking, anchored by a supermarket

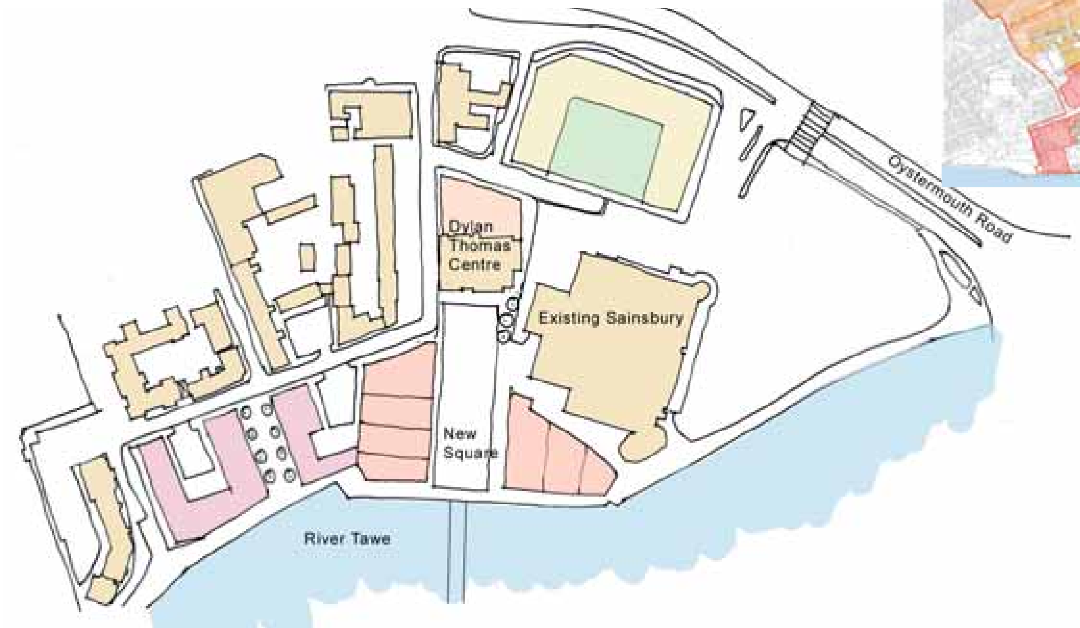
Parc Tawe Option 3 (phase 1)			(phase 2)	
	Total floor area (sqm)	Number of units	Total floor area (sqm)	Number of units
Supermarket	12000			
Retail Anchor				
Retail	7200			
A3	3800			
Commercial	43600			
Residential	37400	489	134000	1752
Car Park	36000	1440		



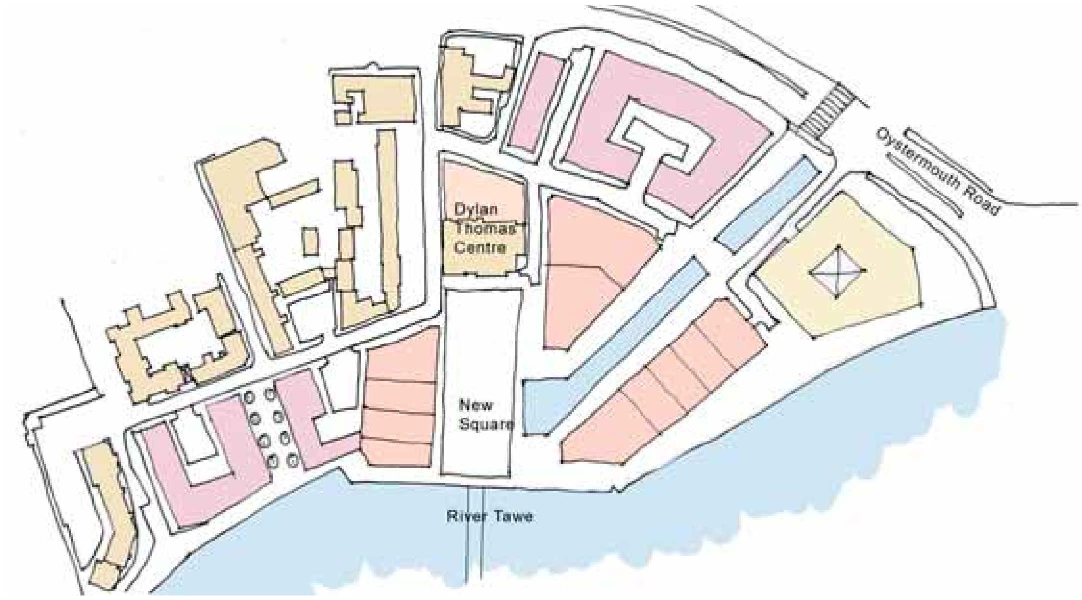
Option 4: New integrated retail centre, eating and drinking with high density residential along improved River Tawe waterfront

Parc Tawe Option 4		
	Total floor area (sqm)	Number of units
Supermarket		
Retail Anchor		
Retail	26600	
A3	2500	
Commercial	4800	
Residential	150300	1965
Car Park	36000	1440

Sainsbury's/Riverside/ Sailbridge sites (5.3 Ha)



Option 1: Small scale residential, eating and drinking with commercial fronting Victoria Road



Option 2: Maximised residential, eating and drinking along an intensified public edge to the River Tawe

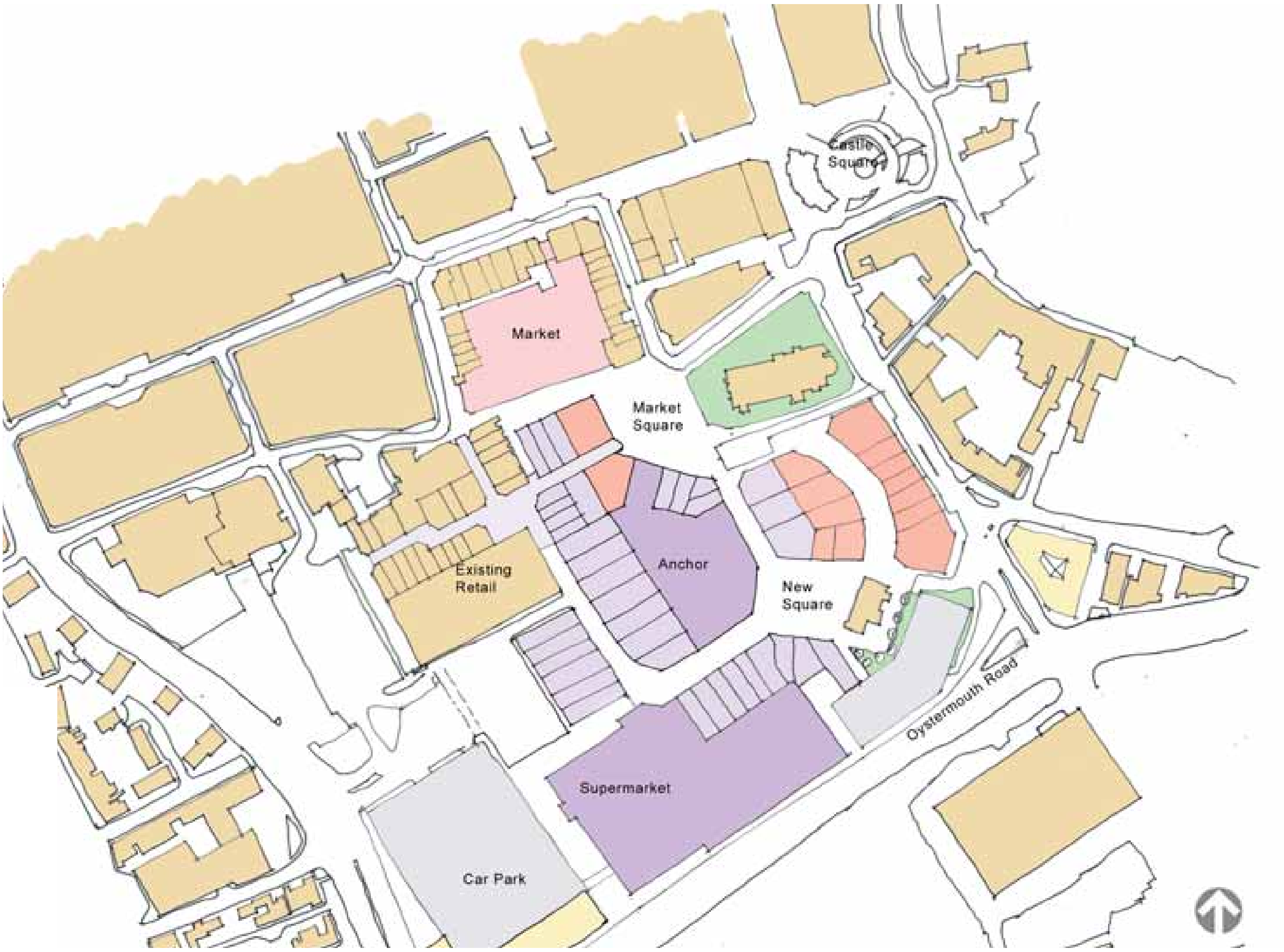
Key:

- Anchor retail units
- Retail
- Commercial
- Eating and drinking
- Residential
- Leisure
- Market
- Public buildings
- Multi storey car park
- Existing buildings

Sainsbury's Option 1		
	Total floor area (sqm)	Number of units
A3	4200	
Commercial	10200	
Leisure	900	
Residential	38600	505

Sainsbury's Option 2		
	Total floor area (sqm)	Number of units
A3	8800	
Commercial	53400	
Leisure	900	
Residential	60800	795

St. David's Sites (5.52 Ha)

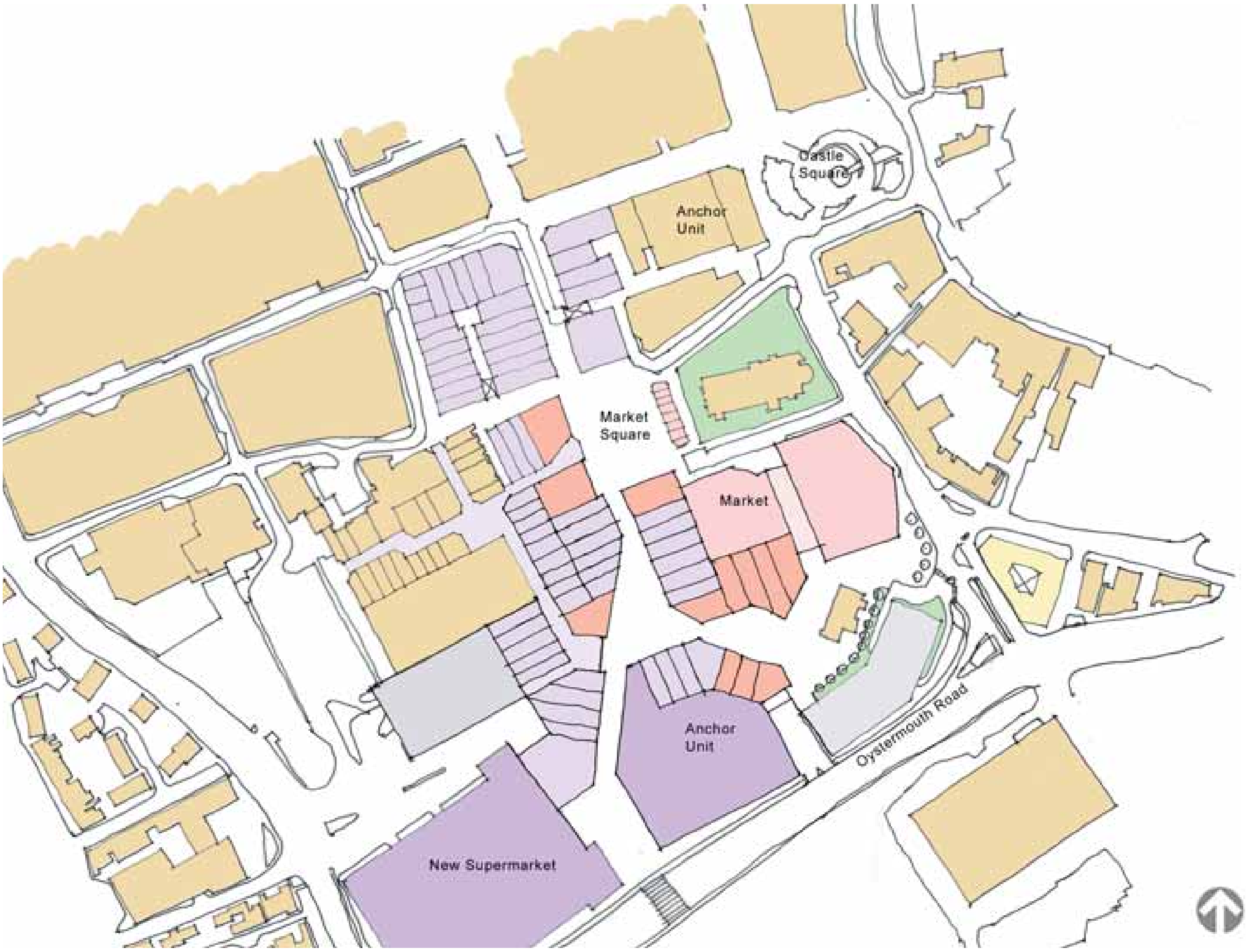


Option1: Existing Tesco with anchor store attached and Market in existing location

Key:

- Anchor retail units
- Retail
- Commercial
- Eating and drinking
- Residential
- Leisure
- Market
- Public buildings
- Multi storey car park
- Existing buildings

Tesco/St. Davids Option 1		
	Total floor area (sqm)	Number of units
Supermarket	12400	(incl extn)
Retail Anchor	14550	
Retail	9350	
Market		
A3	5550	
Commercial	8200	
Residential	33050	432
Car Park	31500	1260

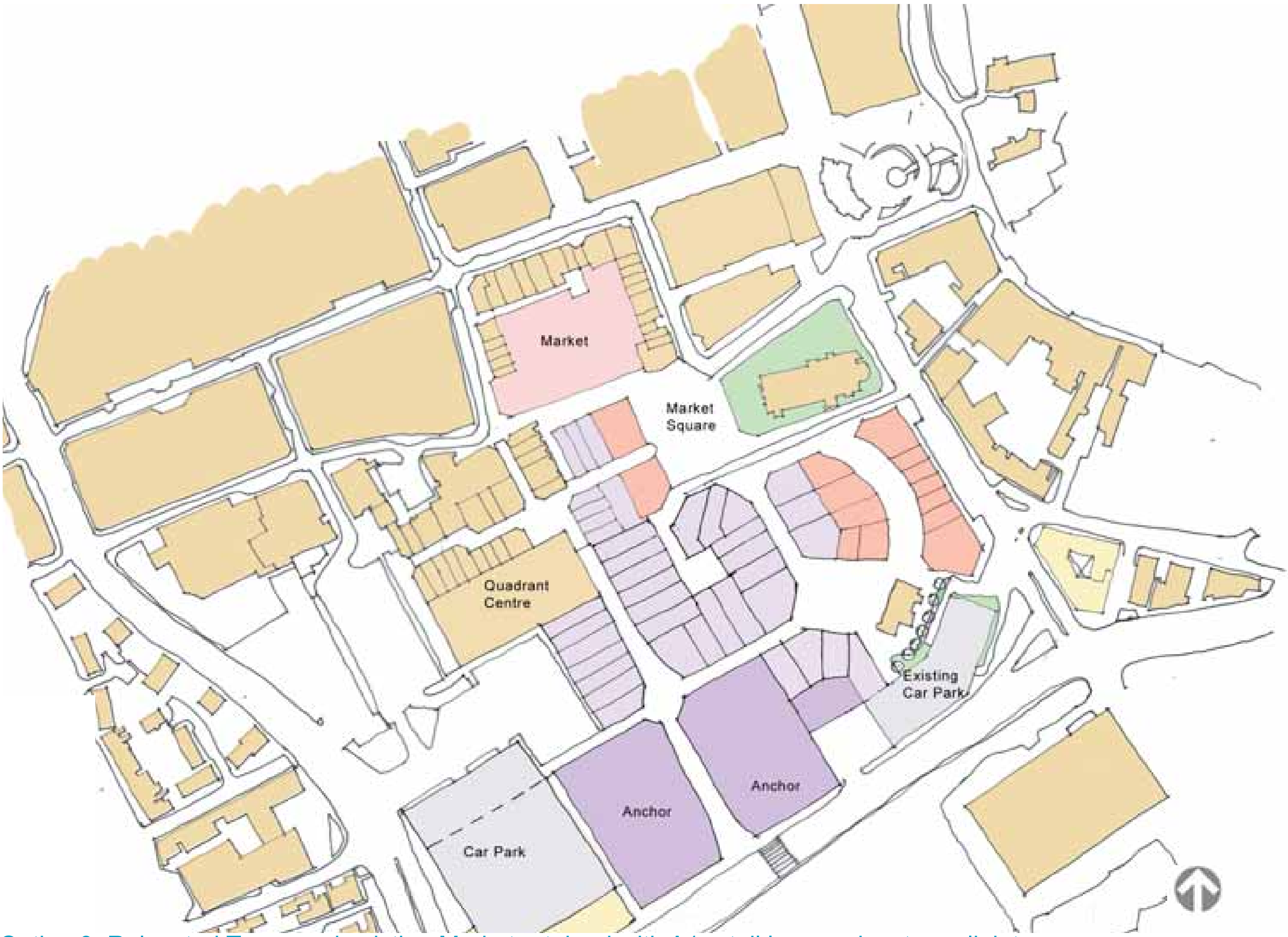


Option 2: Reconfigured Tesco and relocated Market with retail circuit in between

Key:

- Anchor retail units
- Retail
- Commercial
- Eating and drinking
- Residential
- Leisure
- Market
- Public buildings
- Multi storey car park
- Existing buildings

Tesco/St. Davids Option 2		
	Total floor area (sqm)	Number of units
Supermarket	12400	
Retail Anchor	13400	
Retail	10600	
Market	6600	
A3	5350	
Commercial	18700	
Residential	29200	383
Car Park	23600	944



Option 3: Relocated Tesco and existing Market retained with A1 retail loop and a strong link to Paxton Street

Key:

- Anchor retail units
- Retail
- Commercial
- Eating and drinking
- Residential
- Leisure
- Market
- Public buildings
- Multi storey car park
- Existing buildings

Tesco/St. Davids Option 3		
	Total floor area (sqm)	Number of units
Supermarket		
Retail Anchor	34500	
Retail	13050	
Market	5800	
A3	6400	
Commercial	9950	
Residential	39800	520
Car Park	26400	1050

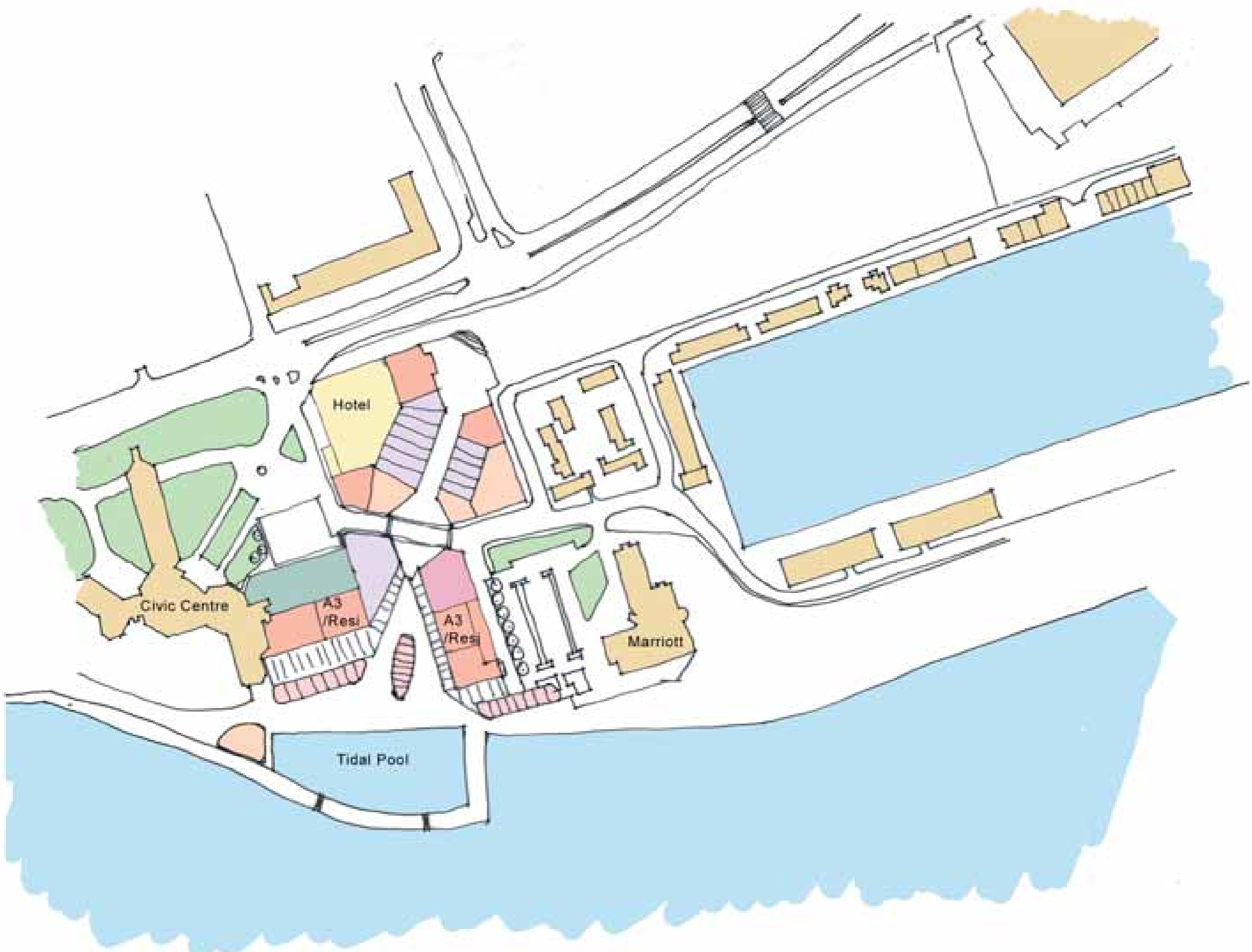
Option 4: Relocated Tesco and Market with A1 retail loop and increased retail provision around St. David's

Key:

- Anchor retail units
- Retail
- Commercial
- Eating and drinking
- Residential
- Leisure
- Market
- Public buildings
- Multi storey car park
- Existing buildings

Tesco/St. Davids Option 4		
	Total floor area (sqm)	Number of units
Supermarket		
Retail Anchor	22800	
Retail	19300	
Market	7200	
A3	3500	
Commercial	6400	
Residential	42400	554
Car Park	32500	1300

Paxton Street Car Park Sites (6.4 Ha)



Option: Mixed use leisure based retail and residential district with hotel cluster

Key:

- Anchor retail units
- Retail
- Commercial
- Eating and drinking
- Residential
- Leisure
- Market
- Public buildings
- Multi storey car park
- Existing buildings

Paxton Street car park Option		
	Total floor area (sqm)	Number of units
Retail	3400	
Market	1000	
A3	4400	
Commercial	1800	
Hotel	6600	
Leisure/Aquarium	2600	
Residential	71000	928

3 SITES OF IMPORTANCE IN SWANSEA

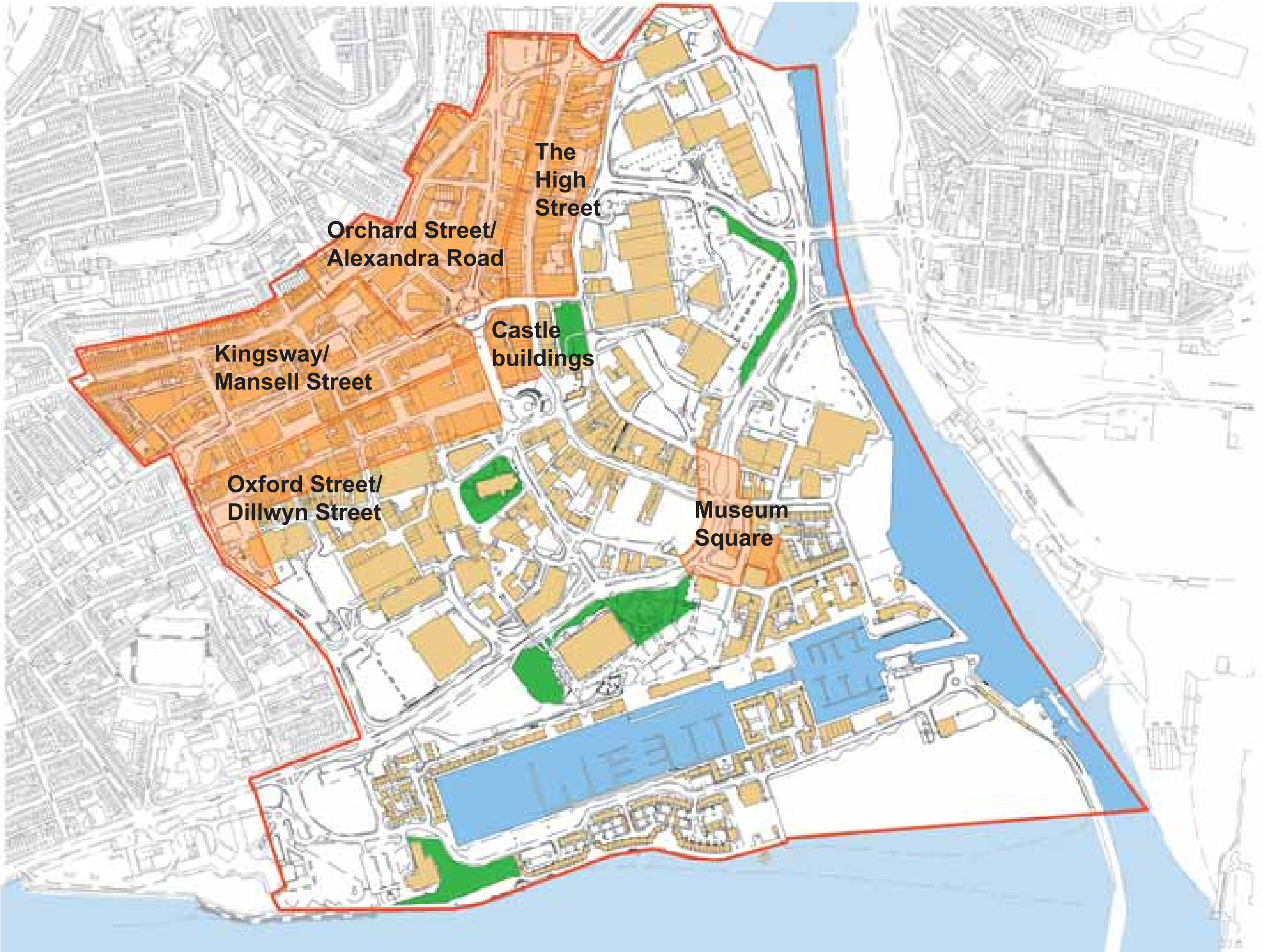
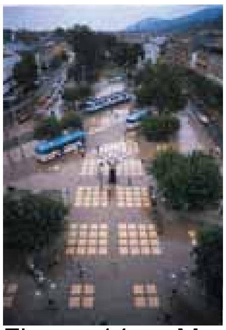


Figure 13 Important sites

Key:

Important sites



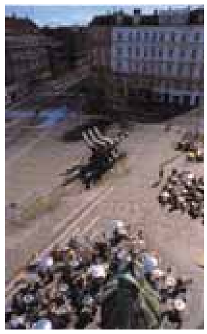


Figure 14 Museum Square precedents - trafficked spaces

Figure 15   Castle Buildings precedents - major retail facades


Figure 16   The High Street precedents - secondary or specialist retail with mixed use spaces onto Parc


Figure 17   Orchard Street/Alexandra Road precedents - artisans district with major historic building core


Figure 18   Kingsway/Mansell Street precedents - simple yet interesting streetscape, colour and life


Figure 19   Oxford Street/Dillwyn Street precedents - retail Street character and link to the waterfronts

Swansea City Centre: Strategic Framework

Technical Appendix 4

PROPERTY ANALYSIS & DEVELOPMENT STRATEGY

Donaldsons

CONTENTS

1 INTRODUCTION

1.1 The purpose of this report is to provide a development strategy for the future role of Swansea City Centre. This strategy will support the vision, objectives and site specific recommendations that are contained with the Strategic Framework for Swansea City Centre. For information, Donaldsons are part of a consultant team being led by Roger Tym & Partners which have been commissioned by City and County of Swansea (CCS) and the former Welsh Development Agency (now merged with the Welsh Assembly Government) to prepare the Strategic Framework for the city centre.

1.2 This report has been prepared on a stand alone basis to clearly define a strategy for future development within the city centre and to support the Strategic Framework. The main focus of this report is centred on retail and the need for Swansea City Centre to maintain and enhance its role as a true regional centre with a waterfront city and European flavour. This report will also comment on the issues facing aspirational growth of residential and office development within the city centre.

1.3 Whilst the main emphasis of this development strategy and the overarching Strategic Framework is to encourage mixed use development as part of a high quality and distinctive city centre, the importance of retail as an essential part of the regeneration process cannot be underplayed. It has been demonstrated in comparable cities across the country that new large scale retail development within the city centre can create a strong destination as well as acting as a catalyst for delivering wider regeneration benefits through the high commercial development values generated and through integration as part of mixed use schemes.

1.4 Swansea's retail offer is currently below average for a city of its size and there is a need for strategic objectives that allow a step change in both qualitative and quantitative terms. No significant new comparison space (other than refurbishment – for example the Gap scheme on Oxford St/ Waterstones) has been delivered within the defined city centre since Parc Tawe in the late 1980s and 1990s and since this time most of the retail focus has been in out of centre locations with many traditional high street retailers now concentrated in both Fforestfach Retail Park and Morfa Retail Park. Within the prime retail area there has been little new comparison development since the Quadrant was opened in 1978 (refurbished in 1995) and St David's in 1980. The latter is now looking particularly tired and outdated and has failed as a shopping centre. In short Swansea's prime comparison shopping offer has had little new since 1980 and needs a substantial make over.

1.5 The purpose of this report is to ensure that the Strategic Framework is supported by an evidenced based strategy that seeks to direct retail growth within the core city centre not, through piecemeal new development but in the form of a major retail led mixed use scheme, anchored either by a major quality comparison department or variety store and/or a major convenience based store, plus a range of quality fashion based comparison non-bulky retail units.

2 THE ROLE OF RETAIL IN REGENERATION

2.1 Retail development has traditionally played a significant role in the regeneration of urban areas. Research by the British Council of Shopping Centres and the College of Estate Management substantiate the positive regenerative effects, case studies of new retail led mixed use town centre schemes also demonstrate this and it is no coincidence that most URC's established in England have used major retail based schemes to kick-start a cycle of regeneration.

Research

2.2 The British Council for Shopping Centres (BCSC) has researched the role of retail schemes in wider regeneration. 'Urban Design for Retail Environments' (2002) is a report for the BCSC Urban Task Force, and includes contributions by a range of developers, investors, public bodies and property agencies/consultancy including Hammerson, Grosvenor, ING, Land Securities and AM Development UK, CABE and Liverpool City Council.

2.3 The BCSC study points to a number of current major city centre initiatives such as Belfast, Liverpool, Manchester, Nottingham and Sheffield that are delivering large retail schemes in centres in response to the Government's urban agenda. This, the study notes, can be made more difficult where there are existing under-performing buildings, and where sufficient values and returns are required to make a scheme viable.

2.4 The BCSC report goes on to note that private sector-led, in-town retail schemes have a far greater remit than just increasing the retail offer. Schemes can also re-brand the centre, create quality public spaces diversify the leisure offer and help to sustain a range of other regeneration initiatives including housing and transportation.

2.5 The report observes that retail development is "a regeneration driver that has been around for a long time and is currently the biggest driver of change in town and city centres…." and "…retail-led regeneration has become a catalyst to unleash the potential of town and city centres" and "….provides the necessary investment and infrastructure to physically knit the disparate parts of towns together, to sustain the critical mass necessary to support other facilities that are essential in sustaining a vibrant town centre".

2.6 As an example, the BCSC research points to The Oracle Centre in Reading, where clear connections and integration into the existing town centre have lifted Reading's overall performance and enhanced values outside of the development site.

2.7 Research by the College of Estate Management (CEM) for the British Property Federation (May 2003) has considered the indirect and induced effects of property led regeneration in deprived areas. It notes how retail schemes in deprived areas can support wider economic 'multiplier' effects.

2.8 The CEM research suggests that multiplier effects have two types of impact. The first, 'indirect effects', results from particular industries purchasing goods and services from other sectors and thus stimulate those industries as well. The supplying industry, in turn, makes purchases from other suppliers, creating a 'ripple' effect of business generation.

2.9 The second impact, 'induced effects', relates to the fact that industries pay wages and salaries to their employees who spend income on consumer goods and services. This spend creates wage income for other industries, who spend their income, causing a 'ripple' effect. For example, the Report suggests that a new shopping centre will have effects on suppliers of the shopping centre (an indirect effect), and on the economy through increased spending by new employees (an induced effect). Typical indicators of the multiplier effects include directly related construction and operational employment, indirect employment, and increased levels of household income.

Case Studies

2.10 It is instructive to consider recent case studies and their impact. West Quay Centre in Southampton is an 80,000 sq. m shopping centre development that opened in 2001. The Oracle Centre in Reading is a 70,000 sq. m shopping centre development that opened in 1999. As an aside, Donaldsons was involved in the development of both, and provides an ongoing asset management role as well, again for both centres.

2.11 Both schemes were developed by Hammerson PLC and represent two of the most recent completed centres which have been trading for a number of years from which conclusions can be drawn on their lasting impact on the rest of the town centre and wider catchment. Both are good-sized centres with clearly defined catchments.

2.12 The following table considers the changes to a number of key performance indicators in each centre.

Table 1: Key Performance Indicators in Southampton and Reading

	West Quay Centre, Southampton		The Oracle Centre, Reading	
	Pre Development (1999)	Post Development (2003)	Pre Development (1998)	Post Development (2002)
Retail Rank	45th	7th	25th	9th
Retailer Requirements	120	130	75	135
Zone A Retail Rents (£psf)	200	265	190	200

2.13 It can be seen that each town has seen a significant jump in the national retail rankings following the shopping centre development. There has been continued and growing retailer demand in these town/city centres despite partly because of the large increase in retail space brought forward by the schemes, as evidence by the stated individual retailer requirements before and after the schemes.

2.14 Likewise, in both instances retail rents have remained buoyant in each centre and have shown strong improvement relative to national averages, which is reflected in the strengthened local economies. Retail rents can be a strong indicator of local economy performance, reflecting both the size of people's disposable income in the immediate catchment, and the business perception of the sustainability of that source of demand.

2.15 The Oracle Centre has helped initiate a wider cultural regeneration around the River Kennet, which the centre backs onto. The area has benefited from a cinema, art gallery as well as a fast growing bar and restaurant culture. A large number of riverside flats have also been developed separately from the Oracle development. These developments have created a sense of community to an area that was otherwise quiet beyond shop opening hours. This has in turn attracted more tourists to the town. In addition, a number of major investment proposals have been put forward continuing Reading's regeneration and growth.

2.16 The West Quay Centre has also acted as the foundation for the current regeneration of the city. West Quay has regenerated a previously derelict part of the city, while providing a focus for the community and creating 3,500 jobs locally. Furthermore, a number of current and future developments are due to take place throughout the city centre as indicated in the above table.

Government initiatives – URC's

2.17 Many URC's set up by central government take a comprehensive approach to city-wide regeneration areas, as opposed to more focussed sub-City areas. This allows each URC to have a comprehensive view of the entire city when considering the overall balance of land uses to be developed. It is significant that many URC's identified are using retail schemes as the vanguard of city wide regeneration (in a similar way to the Urban Development Companies that went before them):

- **Liverpool PSDA**: Paradise Street – a 1.5 m sq ft joint venture between Grosvenor Limited and Liverpool City Council, supported by the URC
- **Sheffield One**: the New Retail Quarter – a joint venture between Hammerson PLC , the URC and Sheffield City Council
- **The New Swindon Company**: – Brunel Shopping Centre extension – a joint venture between Westfield Shopping towns Ltd and Swindon Borough Council
- **Leicester Regeneration Company**: The New Shires, a 750,000 sq ft extension of the existing Shires shopping centre – a joint venture between Hammerson PLC and Hermes in partnership with Leicester City Council
- **Derby Cityscape**: Eagle Centre - a 68,000 sq m extension – partnership between Westfield Shopping Towns and Derby City Council
- **Newport Unlimited:** Friars Walk – a new retail development where Modus were selected as a preferred developer for a mixed use re-development in Newport city centre.

Summary

2.18 We consider that a well designed, properly integrated, sustainable and serviced retail led mixed use scheme has an important role play in the wider regeneration of a town or city centre. In particular retail can provide and early kick start to other regeneration initiatives and property sectors since retail will often provide relatively higher value uses to a make development viable. In this way it is a leading sector.

2.19 However, it is also a highly sensitive and commercial market that requires the right location, quantum and mix of development, with necessary servicing, accessibility and car parking. We now consider the nature of a scheme that we consider is required in Swansea city centre.

3 RETAIL CONTEXT: SWANSEA CITY CENTRE

3.1 This section of the report covers an overview of the current retail market in Swansea with analysis of key headline rates and comparisons with other cities. The purpose of this exercise is to highlight updates to the baseline position on retail but does not seek to replicate the full market analysis contained within the Baseline Report for the Strategic Framework in May 2005.

3.2 This section of the report provides detailed evidence to support this statement and help inform a development strategy for the city centre.

Swansea City Centre Retail Context

3.3 It is not the purpose of this development strategy to replicate or update all of the data contained within the Baseline Review to the Development Framework undertaken in May 2005. However, the data outlined in this section provides an up to date analysis of where Swansea sits in the retail hierarchy and how it compares as a retail centre to competing centres within the region, sub region and M4 corridor.

3.4 For this purposes of this development strategy, Donaldsons have used statistical information obtained from PROMIS, with the aim of positioning Swansea within the context of competing centres and similar town and city centres.

3.5 The areas covered by this analysis are as follows:

- Swansea's total city centre floorspace (in comparison with other centres)
- Swansea's total city centre floorspace by rank
- Swansea's total retail warehouse floorspace (in comparison with other centres)
- Swansea's total number of retailer requirements (in comparison with other centres)
- Swansea's prime city centre rents (in comparison with other centres)
- Swansea's city centre vacancy rates (in comparison with other centres)
- Swansea's primary catchment area (in comparison with other centres)
- Swansea's Total Comparison Goods Spend (in comparison with other centres)

3.6 In relation to the above analysis, the data has measured Swansea's performance against the Retail PROMIS average. For information, the PROMIS data covers the 200 towns and cities across the UK and selected on the basis of size and prime Zone A rents. Central London Centres (such as Oxford Street and Regent Street) and some large Regional Shopping Centres (such as Bluewater and Trafford Centre) are not included in this data.

3.7 For the purposes of this report, Donaldsons have also used the following cities, towns and retail destinations which lie along the M4 corridor as benchmark in the majority of tables:

- Bristol
- Cardiff
- Cribbs Causeway
- Newport
- Reading
- Swindon

3.8 Table 2 below highlights the amount of retail floorspace within Swansea city centre. The PROMIS data estimates current total retail floorspace (sq ft and sq metres) within the core retail area of the town or city, excluding retail parks and solus retail warehouse units located within the town centre.

3.9 The table below outlines the top ten retail centres ranked by floorspace together with comparisons of other towns and cities in Wales, in waterfront locations in the south of England, in the overall Swansea catchment area and along the M4 corridor we have inserted Swansea's overall position as part of a wider comparator.

Table 2: Town Centre Floorspace

Centre	Town Centre Floorspace (000sq ft)	Rank
Birmingham	3,238	1
Glasgow	2,763	2
Nottingham	2,736	3
Manchester	2,473	4
Newcastle upon Tyne	2,242	5
Norwich	2,223	6
Southampton	2,177	7
Leeds	2,171	8
Leicester	2,107	9
Croydon	2,101	10
Reading	1,834	14
Cardiff	1,752	16
Swansea	1,652	18
Gloucester	1,330	41
Bristol	1,319	43
Cheltenham	1,303	44
Exeter	1,245	51
Plymouth	1,233	55
Taunton	1,138	65
Swindon	1,101	71
Wrexham	1,045	83
Newport	975	97
Llandudno	902	115
Weston-Super-Mare	857	119
Bridgend	621	179
Llanelli	570	186

Source: PROMIS Database 2006

3.10 The information above suggests that Swansea has 1.6 million square feet of retail floorspace which is above the PROMIS average. Swansea is below Cardiff and Reading but above centres such as Bristol, Swindon and Newport.

3.11 Table 3 below illustrates the same information by ranking the city centre against the top 200 towns and cities across the UK.

Table 3: Town Centre Floorspace Rank

Centre	Town Centre Floorspace (Rank out of 200, 1=Best)
Bristol	43
Cardiff	16
Cribbs Causeway	146
Newport	97
Reading	14
Swansea	18
Swindon	71
Retail PROMIS average	n/a

Source: PROMIS Database 2006

3.12 This data highlights the fact that Swansea, in terms of total town centre floorspace, is in the top 20 retail centre with the country. In comparison terms, Swansea is only 2 places behind Cardiff (a difference of 100,000 sq.ft of space). It should be noted that work has now begun in Bristol into a £500 million project involves the creation of a new city quarter at the entrance to Bristol, comprising around 1 million sq ft of high quality retail and leisure space. The retail element will be anchored by a four-storey House of Fraser department store and the expanded shopping district will boast a further 15 major stores and more than 100 additional shops.

3.13 In relation to sourcing the information above, it is unclear whether the PROMIS data includes Parc Tawe within the city centre floorspace figures, as even though it is an edge of centre retail park the emerging Swansea Unitary Development Plan, includes Parc Tawe is within the city centre boundary. This is significant as Parc Tawe, in both phases, totals approximately 250,000 sq.ft of floorspace. However, the above table suggests that a large amount of city centre floorspace is either outside the prime area or in secondary/tertiary locations.

3.14 Table 4 below highlights the amount of retail warehouse floorspace within Swansea's primary catchment area. The PROMIS data estimates current total (non food) floorspace in retail parks and solus retail warehouse units within the primary catchment area of the Retail PROMIS Centre (including town centre retail parks and solus units).

Table 4: Retail Warehouse Floorspace

Centre	Total RW Floorspace (000s sqft)
Bristol	2,753
Cardiff	4,485
Cribbs Causeway	n/a
Newport	879
Reading	1,461
Swansea	2,194
Swindon	1,222
Retail PROMIS average	818

Source: PROMIS Database 2006

3.15 This data illustrates the significant amount of retail warehouse floorspace within Swansea which is almost three times the Retail PROMIS average. Only Cardiff and Bristol has a higher amount of retail warehouse floorspace with Swansea having an additional 733,000 square feet.

3.16 Table 5 illustrates the number of town/city centre retailer requirements at January 2006. This data is developed from the number of retailers with a registered requirement for representation in the town or city at the reported date and is updated on a quarterly basis through Focus Database.

Table 5: Town Centre Retailer Requirements

Centre	Town Centre Retailer Requirements (January 2006)
Bristol	119
Cardiff	125
Cribbs Causeway	n/a
Newport	22
Reading	123
Swansea	51
Swindon	72
Retail PROMIS average	59

Source: PROMIS Database 2006

3.17 The information above highlights the limited retailer interest that currently exists for Swansea city centre. The number of retail requirements is actually below the Retail PROMIS average, the main centres such as Cardiff, Bristol and Reading but indeed below the number of requirements for Swindon. In addition, PROMIS data illustrates the fact that retailer requirements for Swansea have been below the PROMIS average since July 2000.

3.18 This need to be set against the background that whilst Swansea has a significant amount of floorspace for its catchment area, retailer requirements are well below average. This suggests that Swansea is underperforming and simply not attracting the number and indeed quality of retailers than other centres do in the M4 corridor.

3.19 The table below provides a snap shot of the type of companies that have a requirement in Swansea. It is important to note the quality and type of retailer requirements that are currently looking to invest in the city.

Table 6: Retailer Requirements in Swansea

Snap Shot of Retailer's with Requirements in Swansea (March 2006)	
▪ 99p Stores	▪ Mostyns
▪ Aldi Stores	▪ Netto Foodstores
▪ Beaverbrooks the Jewellers	▪ Office Holdings Ltd
▪ Bookworld Ltd	▪ Partners the Stationers
▪ Card World Ltd	▪ Pasty Presto
▪ Carphone Warehouse Group	▪ Poundland
▪ Choices Video	▪ Principles Retail
▪ Coast	▪ Saks Hair (Holdings)

- Coffee No 1 Ltd
- Costa Ltd
- Fopp Records
- Fragrance Shop (The)
- Game Ltd
- Greggs plc
- Hair Express International
- Hawkins Bazaar
- Hein Gericke (UK)
- Iceland Foods
- Julian Graves
- Lasercare Clinics
- Laura Ashley Holdings
- Sharps Individual Bedrooms
- Shaw Trust Ltd
- Sharps Individual Bedroom
- Shaw Trust
- Signet Group
- Slater Menswear
- Speedy Hire
- Stationary Box Holdings
- Supercuts
- TJ Hughes plc
- TK Maxx
- USC Group plc

Source: PROMIS Database 2006/Focus Database 2006
NB: The above list is a snap shot taken in March 2006. The PROMIS data is updated every quarter.

3.20 In addition to the above, Donaldsons are aware from involvement in the Princess Way scheme in the former David Evans building that Zara and Slaters have conditionally committed to the scheme. We are also aware that Virgin and H&M have a potential requirement within the city centre.

3.21 Reviewing Table 6, it can be seen that whilst a number of retailer requirements exist, they do not include many fashion or lifestyle retailers or higher quality retailers, i.e. there is a market gap in Swansea and currently expressed retailer requirements are not filling that gap.

3.22 Table 7 below provides a comparison of prime town centre rents at the end of 2005 on a pound per square foot Zone A equivalent. The information is derived from PROMIS database and is based on the top achievable rent for a retail unit within the town or city at specified date. The data is updated twice yearly and is originally sourced through the Local and National Agents, PMA.

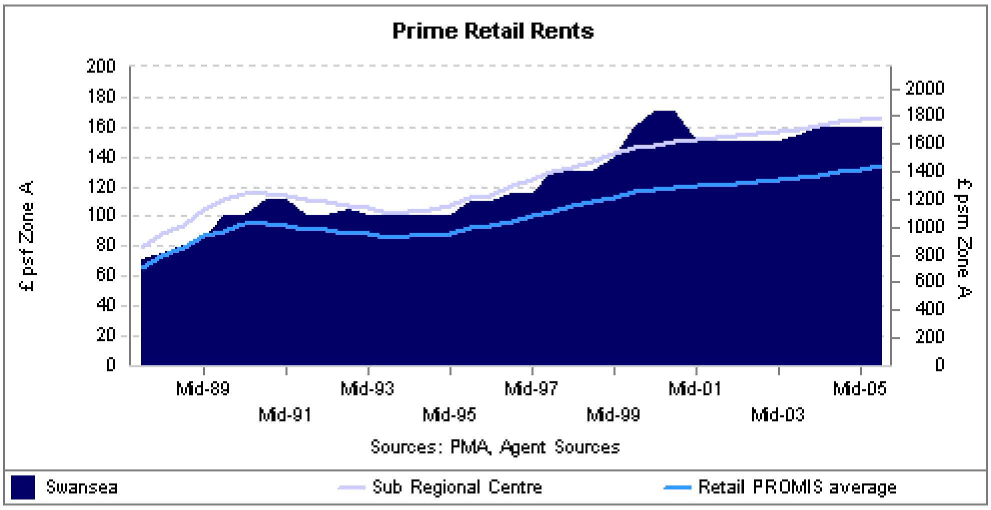
Table 7: Prime Town Centre Rents

Centre	Prime Town Centre Rents end 2005 (£PSF Zone A)
Bristol	190
Cardiff	290
Cribbs Causeway	320
Newport	125
Reading	260
Swansea	160
Swindon	180
Retail PROMIS average	134

Source: PROMIS Database 2006

3.23 The table shows that Swansea has a higher prime town centre rent that the PROMIS average as well as Newport city centre, however it is significantly lower than competitors such as Cardiff.

3.24 In addition to the above, the graph below, sourced from PROMIS data, shows the trend of prime retail rents over a 16 year period. This demonstrates that the trend within the city has been consistent with the trend of the PROMIS average. Rents have remained consistently higher than the average with the main rental peak that was outside the trend being within the period 1999 to 2001.



3.25 Table 8 illustrates the percentage number of units within town centres that are vacant. This information is assessed using the percentage of retail units within the core retail area that were vacant at the time of the latest PMA Audit undertaken by PROMIS. Units under construction or under redevelopment are excluded from the vacancy count.

Table 8: Town Centre Vacant Units

Centre	Town Centre Vacant Units (%)
Bristol	8.1
Cardiff	7.6
Cribbs Causeway	n/a
Newport	n/a
Reading	8.5
Swansea	10.1
Swindon	8.3
Retail PROMIS average	6.7

Source: PROMIS Database 2006

3.26 The above information shows that Swansea has a higher vacancy rate than all of the town and city centres shown within the comparison table. It is significant that the rate for Swansea is actually 3.4% higher than the Retail PROMIS Average but this could be as consequence of the high vacancy rates in the St David's centre and the size of these units being the main contributor.

3.27 Table 9 outlines the primary catchment population assessed against a number of comparison centres. The figures are sourced from the PROMIS database and are based on the total number of people within the town's primary retail catchment area, based on the CBRE National Survey of Local Shopping Patterns 2002 and representing the area from which 80% of the town's shoppers originate.

Table 9: Primary Catchment Population

Centre	Primary Catchment Population 2004 (000s)
Bristol	847
Cardiff	1,193
Cribbs Causeway	637
Newport	300
Reading	629
Swansea	525
Swindon	443
Retail PROMIS average	328

Source: PROMIS Database 2006

3.28 The table shows Swansea has a higher than average primary catchment population which is also significantly higher than Swindon and Newport. Swansea has almost half of the primary catchment population that exists for Cardiff city centre. Therefore Swansea has a relatively high amount of floorspace for its catchment area, but low retailer requirements and lower rental levels than competitors cities suggests that Swansea city centre is underperforming. Part of this is a city centre retail offer with a large amount of secondary and tertiary spaces, with not enough modern prime space to attract national multiplies that would be present in competitors towns.

3.29 Table 10 illustrates Swansea's position with regard to total comparison goods spend which is essentially the estimated total pool of available spending on comparison (non food) goods within the primary catchment area.

Table 10: Total Comparison Goods Spend

Centre	Total Comparison Goods Spend 2004 (£m)
Bristol	2,210,482
Cardiff	2,643,544
Cribbs Causeway	1,676,275
Newport	672,964
Reading	2,143,155
Swansea	1,095,390
Swindon	1,298,346
Retail PROMIS average	838,904

Source: PROMIS Database 2006

3.30 The table above demonstrates that Swansea has an above average national comparison goods spend but that that spends is significantly lower than the main centres such as Bristol, Cardiff and Reading. It is also important to note that a significant amount of spend is likely to be used outside of Swansea city centre, either in competing centres or out of town retail parks.

Retail Hierarchy

3.31 To supplement the information provided above through the PROMIS database, it is important to analyse Swansea's position with Retail Centre Rankings.

3.32 The information below is developed from three key industry approved sources that provide retail centre rankings.

3.33 The information contained below assesses Swansea's strength as a retail centre in the context of the all centres on a national basis between the period 2000 to 2004 using Experian Goad Centre Rankings. The strength of each centre was assessed by bringing together a number of factors that are widely regarded as being indicative of retail strength for example the importance of multiple presence, but also takes into account other factors that are indicative of retail strength such a the size of the centre and of it's outlets, retail density, vacancies and the presence of key high street multiple retailers.

3.34 For information purposes, the data reporting was altered in 2003 to only include the top 50 centres for that year.

Table 11: Experian Goad Centre Ranking 2000 to 2004.

Centre Rank (1 = best)	2004*	2003*	2002	2001	2000
Bristol	24	20	20	14	15
Cardiff	8	6	6	8	9
Cribbs Causeway	44	43	45	41	50
Newport	N/A	N/A	104	88	94
Reading	12	8	9	21	13
Swansea	N/A	N/A	55	57	51
Swindon	N/A	N/A	70	80	69

Source: Experian Goad 2000 to 2004 (* in these years only the top 50 were illustrated)

3.35 The above data demonstrates that Swansea has for the period 2000 to 2004 not figured within the top 50 centres within the United Kingdom.

3.36 Following 2003, a number of different sources and databases have been developed to rank town and city centres. In order to provide more up to date information the following outlines Swansea's position against both Management Horizon Shopping Index and Javelin VENUESCORE which are used by the retail industry to assess ranking and retail viability.

- **Management Horizon Shopping Index 2003-2004**: The methodology for assessing centre strength is different to Experian Goad but is essentially based on the same criteria. Within this database, Swansea is ranked in position 70. This position demonstrates a decline from previous Management Horizon Shopping Index data which shows Swansea being ranked between 55 and 57 within the period 1996 to 2001.
- **Javelin VENUESCORE 2005**: The methodology for assessing centre strength is based on assessed the retail offer of each shopping venue in the UK using a

straightforward scoring system which takes account of the presence in each location of multiple retailers across including anchor stores, fashion operators and non-fashion multiples. Within this database, Swansea is ranked in position 69.

3.37 On the basis of the most recent data, it can be concluded that Swansea has fallen away, in market perception terms, from being around the top 50 centres in the country. It should be noted that in comparison terms, the Javelin VENUESCORE database currently ranks Swansea alongside centres such as Wolverhampton, Slough, Huddersfield, Carlisle and Cambridge.

Competing Centres & Out of Centre Development

3.38 The data that has been analysed within this section of the report has compared Swansea to a number of key towns and cities within the sub region and region. In preparing a development strategy, and in ultimately assessing Swansea in comparable terms with other centres, it is important to acknowledge whether any of these centres have planned growth through significant new retail development. With this in mind a summary of retail activity in these centres is highlighted below:

Cardiff City Centre

3.39 St David's 2: An 840,000 sq.ft scheme providing an extension to the existing St David's Shopping Centre. The scheme including a 260,000 sq ft John Lewis, unit shops, leisure space, offices, flats and public spaces with construction due to start in spring 2006. It is notable that Cardiff is increasing its department store offering, something that is lacking in Swansea

Cardiff out of centre

3.40 Capital and Regional have plans for a 450,000 sq.ft retail park two miles from Cardiff City Centre at Peckish, together with a new football stadium (although we understand this project currently forces significant difficulties related to it's progression)

Llanelli

3.41 Llanelli is a smaller scale centre but crucially is located to the west of Swansea. Over the past few years, schemes have included the regeneration of North Dock and Parc Trotter, which opened in the early 1990s. Parc Trostre has an open A1 consent, which is reflected in the tenant mix as occupiers include BeWise, Brantano and Poundstretcher, together with more traditional occupiers such as Focus Do It All, Currys, Comet and Rosebys/ Bensons. There are currently plans for additional out of town retail as part of a new stadium development

Carmarthen

3.42 Camarthen is a key town in West Wales, which has a large catchment area. At present future schemes include the former Livestock Market where developers are in pre application discussions for a 195,000 sq.ft mixed use development including retail, leisure & residential on 6 acre site. Significantly, Carmarthen town centre is earmarked for a 250,000 sq.ft retail and leisure scheme, which includes an Apollo cinema. The anchor for the scheme is a Debenhams store of 60,000 sq ft

Bridgend

3.43 Within Bridgend we are unaware of any significant developments that are likely to affect Swansea City Centre. It is however important to recognise the McArthurGlen Designer Outlet which provides 228,000 sq ft of factory outlet space at Junction 36 of the M4

Newport

3.44 Three new developments containing retail are in the pipeline with new developments within the town centre. The main development is a £200M town centre retail development led by Modus. Current development proposals include a total of 388,500 sq.ft of retail including a 105,000 sq.ft Debenhams department store, 12,500 sq.ft of restaurants 6,000 sq.ft, a Health Club, a 47,000 sq.ft multi - screen cinema, 137 city centre residential apartments and improved car parking facilities for up to a total of 1,400 cars. Modus has also recently acquired the Cambrian centre to deliver circa 88,000 sq.ft of new retail development and there are also plans for an extension of the Kingsway Centre

3.45 In addition to the above, the Swansea retail market has been substantively enhanced through developments at both Fforestfach and Morfa. Whilst out of centre retailing does not necessarily compromise town or city centre provision (as they can be complementary in certain circumstances), the proviso is that the town or city centre's retailing provision is strong in its range of retail anchors, overall mix of retailing and in the quality and quantity of property stock. Unfortunately Swansea city centre's current retail provision does not currently meet these criteria.

Summary

3.46 This section of the report has provided statistical analysis to demonstrate Swansea's current position as a retail destination. The following can be deemed to be a summary of the key findings of this research:

Quantum of Space versus Retailer Demand

3.47 The city centre ranks strongly on total retail floorspace but in terms of retail requirements and demand, analysis suggests that there is a below average interest in Swansea as a retail destination

Quantum of Space versus Quality of Space

3.48 The city centre has a large amount of floorspace in comparison to similar cities, there are issues surrounding the quality of retail provision (particularly since the closure of the House of Fraser/David Evans store). There is a perceived lack of department, fashion and variety stores with many multiples being aimed at the mass market

Type of Retail Space

3.49 Existing space within both the high street locations and the covered shopping centres does not meet modern standards in terms of size and configuration. Modern retailers often require units of a greater size than those which the Quadrant Centre, St David's centre and prime retail core can offer and, as such, means the city centre cannot satisfy a number of current prime retailer requirements. The constraint must be related to a good level of retail demand for Swansea and a number of outstanding requirements for the city (outlined later in this section), but part of the incentive to attract a commitment of new high quality retail operators to Swansea relates to an adequate supply of appropriately located and configured units

Weak Retail Provision/Competition

3.50 Swansea city centre has relatively weak retail provision relative to the size of its shopping population. This in part reflects the quality of space within the city centre but also the strength of the surrounding competition, principally Cardiff but also from a number of out of town retail locations. This is supported by a Catchment Population Report dated 2004 undertaken by Donaldsons which indicated a significant leakage to other centres and therefore the opportunity for further penetration if Swansea city centre can attract the 'right' type of retail to encourage shoppers back to the city centre

Significant Retail Presence in Out of Centre Locations

3.51 Swansea contains a large amount of quality out of centre retail space that is not all of this is confined to bulky goods or supermarkets but a large amount is traditional high street retail names normally concentrated in city/town centres. The amount of out of town retail in Swansea is considerable and is a significant factor when establishing a strategy for retail enhancement in the city centre, particularly when existing retailing in the town centre is perceived to be weak

3.52 There is therefore an urgent need to enhance the city centre's prime retailing provision, not only to react to these retail requirements but also to respond to increasing competition in and around Swansea's retail catchment area.

4 RETAIL NEED

4.1 The need or capacity for future retail floorspace in the Swansea catchment area has been independently researched by Roger Tym and Partners. (August 2005).

4.2 Retail need is a quantitative assessment which examines current and projected expenditure on both convenience and comparison goods. Together with existing floorspace data and shopping patterns, this provides an estimate of the quantitative capacity, if any, for additional retail floorspace.

4.3 Whilst quantitative need is only one indicator of capacity it is a particularly important material consideration and is given significant weight in determining planning applications and in cross examination in planning and CPO inquires.

4.4 It is important to note that need is quite different to retail demand as expressed by retailers and/or recorded by agents.

Conclusions on Convenience Capacity

4.5 RTP notes that results of their household survey indicate that residents of the Survey Area are well provided for in terms of supermarket shopping, with a range of large superstores and smaller, local provision.

4.6 If the foodstores in CCS retain their existing overall market share but trade at company average levels, there will be no available convenience expenditure to support additional convenience floorspace in CCS centres in 2011 or 2016.

4.7 There is thus, on the basis of the RTP survey, no quantitative need for additional convenience floorspace. Any additional floorspace which might be permitted should only be provided on the grounds that it would meet qualitative need, strengthen local convenience retail and fill any gaps in provision, or assist/ ‘enable’ with the securing the creation of a viable, deliverable, retail led significant city centre scheme.

Conclusions on Comparison Capacity

4.8 RTP outline two scenarios for comparison floorspace capacity in Swansea city centre in the forecast years. Both of these assume that sales densities in the base year will be maintained, with an allowance made for increasing floorspace efficiency, in the forecast years.

4.9 **Scenario 1** assumes that Swansea city centre will maintain its current market share in the forecast years. The residual expenditure available to support new floorspace, in 2011 will be £76.3 million, rising to £162.1 million in 2016. This equates to floorspace capacity for approximately 11,200 sqm net in 2011, rising to 22,100 sqm net in 2016.

4.10 **Scenario 2** assumes that Swansea city centre has the potential to gradually increase its market share by 2016, to 42%. This will result in residual comparison expenditure available to support new floorspace of £111.4 million in 2011, rising to £260.8 million in 2016. This equates to floorspace capacity for approximately 16,350 sqm net in 2011, rising to 35,550 sqm net in 2016.

4.11 The Scenario 2 net capacity figure equates to a gross capacity for new floorspace in the city centre, including service uses, of approximately 56,000 sqm gross floorspace. We understand from the RTP study that this gross figure has been calculated on the basis that the 35,550 sq.m net figure equates to a gross area of 50,787 sq.m, which if to be provided in a new development (and allowing an additional 10% for the provision of complementary service uses such as banks, financial services, restaurants and the like) points to the need for consideration of development in the order of 55,800 sq m.

5 BASIC PRINCIPLES OF RETAIL LED MIXED USE REGENERATION

5.1 At the outset we make it clear that any retail development has to seen to be part of a mixed-use approach to regeneration. Moreover it has to be part of a city wide approach where the benefits of retail led regeneration can flow across the city and are not be trapped within one particular development form.

Basic principles

5.2 In this context when we talk about retail led mixed use regeneration, we are envisaging the new style of high quality high permeability mixed use CABE friendly scheme that are currently being planned in cities such as Liverpool (Paradise Street), Bristol (Broadmead), Belfast (Victoria Square) and Leicester (Shires West).

5.3 The emphasis on retail led regeneration stems from the fact that in many town centres it is high retail demand and higher land values associated with retail uses that kick starts other development forms. For example, retail can stimulate new leisure uses and residential environments within town centres that have previously struggled to attract such markets. Retail also has to be thought of as a leisure pursuit rather than simply a functional activity. In this regard the best retail environments do not simply serve their catchment areas and clawback expenditure which has leaked to other locations, but can also attract additional high yielding expenditure such as the visitor and the weekend break markets across Europe.

5.4 We also note that whilst successful cities must be about an overall experience with residential, business, commerce, civic, educational, entertainment uses etc all going to create the mixed use aspiration, retail remains a core use. It is often the range and quality of the retail experience that determines whether people visit one centre over another. This is particularly important for Swansea that has seen a significant amount of out of centre retail development, has only half a full catchment area to draw on.

5.5 The city centre will also face increased town centre competition from the John Lewis anchored St David's 2 shopping centre in Cardiff(particularly for the higher expenditure fashion and lifestyle markets) and a strengthening retail provision in Carmarthen serving west Wales, which Swansea may have traditionally looked to dominate. There are also a number of significant new retail developments being planned in Newport, which as this report has demonstrated, is currently ranked below Swansea in the retail hierarchy.

5.6 As we have already noted retail can also help drive the wider regeneration process. Economically it can clawback expenditure which has been leaking away and with a well designed and integrated scheme can generate linked and spin off trips to other retail frontages and businesses within the city centre. It also provides a great many new and flexible employment opportunities and also provides a multiplier in the local economy whereby salaries are recycled and local services and businesses benefit form new contracts. It also has a significant impact on the image and marketing of a city centre. For example, the Bull Ring has almost become the symbol of Birmingham's renaissance.

5.7 The justification for retail led regeneration in Swansea is based on the following key points:

Aim of the Development Framework

5.8 This seeks to develop the city centre into a premier waterfront city and visitor destination. It is accepted that delivering this aim requires more than just the enhancement of retail space and as a consequence there is a need for this framework to provide the parameters for delivering a high quality mixed use environment. To achieve this, opportunities need to be provided to enhance the visitor and tourism economy, encourage business growth in the commercial sector and an increase in residential provision within the core city centre.

Need for a Step Change in Retail

5.9 To increase the level of expenditure in the city centre and drive up rents and values. This is particularly evident bearing in mind the level of investment, particularly in retail, that has recently taken place in out of centre locations (e.g. Fforestfach Retail Park and Morfa) and the perception that all investment and activity is outside the core area (e.g. SA1 Swansea Waterfront). As a consequence of this, and whilst there is a need to deliver more than just enhanced retail development as part of this framework, the rationale centres on improving the environment within the core city centre, improving linkages and enhancing retail provision.

Need for critical mass of new space

5.10 The city centre has not seen major new retail development since construction of the St David's centre in the mid 1980's, There has been no major new town centre comparison retail since development of the Quadrant in 1979. The adjoining Par Tawe bulky goods based Retail & Leisure Park was developed in two phases – Phase 1 opened in 1987, Phase 2 in the late 1990's. As such the town centre retail offer is tired and largely comprises space which is not attractive to today retailers looking for larger units. For example whilst 10 -15 years ago the average unit size was in the 1000 to 2000 sq ft range, average comparison units for national multiples is now more likely to be in the 3000 – 5000 sq ft or even higher range. There is therefore not only a need to provide a critical mass of new space to claw back lost expenditure, but also to provide modern units that will attract retailers.

Step change in quality of offer

5.11 Section 3 of our report identified the current retailer requirements for Swansea. There are 51 requirements but with only a few exceptions the list includes few fashion or lifestyle retailers or those in the higher quality end of the retail market. We do not find this surprising as retailer lists are never complete schedules and are only a snap shot in time. Moreover, many of the aspirational or higher quality fashion and lifestyle retailers will not express an interest in Swansea (or any where else for that matter) until they know that there is a real prospect of a well anchored and serviced scheme offering prime new space from which they can trade. Quite simply the very availability of a new scheme (or the very real prospect of it) will bring forth demand from retailers who would otherwise not consider representation in Swansea.

Quality anchors

5.12 To a large degree the holy grail of a successful town centre or city scheme remains the attraction of at least one and often two or more anchor operators to a scheme. At present Swansea only has Debenhams as a mainstream department store with M&S, BHS and Littlewoods as variety stores. Tesco provides an anchor role within the centre, but foodstore customers often have different shopping behaviours patters and there is healthy debate within the shopping centre industry as to whether shoppers combine food trips (i.e. essential provisions) with non-food trips (i.e. more recreational and leisure based trips).

However, food operators such as Tesco are now expanding into stores having a significant comparison element and, on this basis, are becoming another anchor retailer for such schemes.

5.13 A city centre with aspirations to enhance its regional role, develop a distinct waterfront city concept and become a destination in its own right needs to secure other quality anchors. It is the anchors which act as the honey pots around which other multiple retailers congregate and in practice pay the rents that make town centre schemes financially viable. Such anchors include high quality department stores (e.g. House of Fraser) and large fashion units (e.g. Next and H&M who are occupying ever larger stores). Food stores (as stated above are increasingly selling non-food goods as well) and can also anchor in the sense of being large footfall drivers. However, food stores alone do little to attract back high quality comparison spending which has been leaking away to other centres.

Visitor Destination

5.14 To promotethe core city centre as a visitor destination. This justification is not solely related to the commercial fact that new retail development can be used as a catalyst for city centre regeneration through its role as a commercially viable facilitator of development.

Baseline Analysis and Research

5.15 Analysis has demonstrated that the key drivers for retail led regeneration are not only based on commercial viability but the need to improve the level of retail offered within the city centre which has over the past few years been underachieving.

Design & Environmental Improvements

5.16 A new retail led mixed-use scheme offers the opportunity of providing high quality design and environmental improvements within the very heart of a town centre.

Car Parking

5.17 A new retail led mixed-use scheme offers the opportunity to provide new high quality car parking within the city centre.

The Nature of a Retail Led Mixed Use Scheme

5.18 What type of retail offer is therefore needed to meet the strategic framework and planning policy objectives for Swansea city centre?

5.19 At the outset it is important to note that just as retail is only a part of the wider town centre offer which includes leisure, culture, educational, civic, business, residential and other service uses, the retail offer within a successful town centre needs to be broadly based and diverse.

5.20 It is vital to have quality prime retail space for anchor store and national multiples, but it is also vital to have space for other parts of the retail offer – secondary space, specialist retailers, and local traders, market traders, leisure operators, food and beverage etc. Very often such uses become concentrated either through a market (local traders will not be able to afford the rents in a new scheme which is directed to national multiples) or through planned and managed effort by the local authority and its partners, in certain streets and quarters. For example, the best examples of specialist retailing can be found in distinct parts of city centres which often offer a finer grain and historic backdrop – Lace Market (Nottingham), North Laines (Brighton), Temple Bar (Dublin).

5.21 We return to the specialist offer later in this report. However, we deal first with the basic requirements for a major new comprehensive retail led mixed use scheme for Swansea, as we consider this is the priority foundation stone for the retail and regeneration strategy.

5.22 We see the basic principles which would need to be applied to a site specific planning and development policy as follows:

Genuine Mixed Use

5.23 Whilst retail will be the predominate use in floorspace terms, and main value driver, there is a need for a genuine mix of uses, probably to include residential, food and beverage and leisure uses. We do not consider planning policy should attempt to fix set proportions of different uses, but rather require a genuine mix of uses to be demonstrated within a scheme.

Quantum of Retail

5.24 Given that a fundamental requirement is to achieve a step change in the quality of Swansea's offer, there is a need for at least one if not two or more anchors. A clear objective should be for one of these anchors to be a high quality department store which will provide the focal point for a qualitative uplift in the offer. A simple benchmark is that there will need to be at least the same amount again of national multiple unit shopping to pay for a quality department store anchor. Given that the department store market is as dynamic as any other part of the retail market, it would be imprudent to fix specific ratios for different types of anchor and unit shopping in a planning brief. However, we consider that in order to attract a quality department store of 10,000 sq m plus, together with a secondary anchor, unit shopping and food and beverage offer, we consider a scheme would need to be in the order of 35,000 sq m (gross) or more (say at least 30,000 sq m net) if critical mass is to be achieved. In practice this would be a relatively small scale scheme as compared to most other schemes currently being planned or built out in other UK cities. In this context we note that the RTP retail study forecast capacity for up to 35,000 sq m net by 2016.

Quality of Offer

5.25 Whilst it is difficult for the planning system to specify or condition the type or quality of retailer within a town city centre scheme (which is more usually controlled via development agreements concerned with the grant of an interest in land by the local authority), we consider it would be important for any planning policy to insist on at least one major quality anchor store given the goal of the planning policy in the first place is to achieve not simply a step change in quantum but also quality of offer. Equally, whilst the aspiration must be to anchor the scheme with a department store, the key goal should be a substantive quality scheme, and hence flexibility must be included to allow for other appropriate anchors if no department store can ultimately be attracted; generally, and/or on an economic basis.

Range of Travel Modes

5.26 Access by a range of travel modes is vital to any successful retail led mixed use scheme that wishes to maximise its regenerative potential. Ideally this should be near all public transport facilities, but this is not always possible and choices may need to be made. In Swansea we would see proximity to the bus interchange facility as being particularly crucial given the importance of that mode for shopping trip in the catchment.

Car Parking Provision

5.27 It is essential to recognise that whilst public transport, cycle and walking modes are all vital in the accessibility matrix, the provision of sufficient high quality car parking with easy, safe and convenient access to the scheme (very often via the main anchor store) is pivotal to satisfying retailer requirements and consumer needs. There is little point in attempting to attract anchor retailers and the clawing back of higher spending shoppers (who have become used to driving to car borne out of centre retail parks around Swansea and along the M4 to Cardiff) if the planning policy does not provide for sufficient car parking to allow the scheme to succeed. Indeed, a key part of all modern retail led schemes is to provide high profile easily identifiable safe and convenient car park(s) of choice. In this context, tortuous and contrived routes thorough the main shopping area are best avoided for commercial, design and sustainability reasons. A preference would be to have direct access off the inner ring road. Existing car parking may have to replaced as well as enhanced provision created;

A Focused and Adopted Strategy

5.28 Retailing is a highly competitive and dynamic business with many opportunities for retailers, developers and investors to invest in the UK and increasingly in mainland Europe. In regard to promoting a major new comprehensive retail led scheme, we consider it vital that Swansea identify one location it wishes to promote and work with the market on that. This needs to be enshrined in up to date and statutory planning policy. It is vital that Swansea avoid any confusion in the marketplace by being seen to be equivocal about sites. It must learn the lesson of, for example, Birmingham, Belfast and Bristol which for many years had competing sites and schemes which greatly delayed their implementation;

Linking Up the Strategic Framework

5.29 Whilst this should be self evident, Swansea needs to use a new retail led mixed use scheme as a key part of the regeneration jigsaw. Retail can not only stimulate other sectors but can be physically used to link up parts of the town centre. In this context we note that adopted and evolving planning policies as well as the strategic framework have as a key objective the delivery of a unique waterfront city linking the commercial core with the sea front and the Tawe. In this regard, it would appear the strategic direction of travel would therefore have to be to identify a site between the prime shopping area (as defined in the draft deposit UDP as the retail core in Policy CC2) and the seafront or the Tawe - but not both.

Adjacent to the Prime Shopping Area

5.30 All things being equal the development economics of major town centre new retail development(as opposed to smaller developments, refurbishments and reconfigurations) is such that viability is much harder to achieve by redeveloping prime zone A shopping areas simply to put back prime zone A shopping. Whilst special factors such as marriage value may come into play, the optimum in terms of achieving financial viability is to develop new prime retail on secondary areas adjacent to existing prime so the new development can take advantage of lower land values but benefit from being plugged in to the prime areas with their high footfall creating new retail circuits. This suggests promoting an area adjacent to the prime area (as defined in Policy CC2 of the UDP), leaving the market to refurbish or reconfigure other space in the rest of the retail core. Any edge or out of centre proposals which prejudice this goal should be opposed on the need, impact and sequential tests. Such proposals could be detrimental to the core city centre and also affect the deliverability of a comprehensive retail led mixed use scheme.

Deliverability

5.31 There is little point in promoting a new retail led mixed use scheme if it is incapable of being delivered. This brings into play a number of issues – likely financial viability, likely commercial attraction to the marketplace (retailers, developers, and investors), technical viability (e.g. ensuring that the site does not raise insurmountable issues such as ground or access difficulties) and whether the land can be assembled to deliver the scheme. It is vital therefore that before proceeding the city council has had and can be seen to point to a robust assessment of key develieverabilty factors. We return to these aspects later in respect of key sites.

Land Ownership and Assembly

5.32 We have made the point that the City Council will need to prioritise and promote one location/site for the major retail led mixed use scheme. In our experience almost by definition this will involve the assembly of a number of interests in land – freeholds, leasehold, tenancies, rights of way, easements etc to at very least "clean" title. Whilst many interests may be assembled via negotiation, the use or very real threat of compulsory purchase powers will be needed. This need will be heightened in that the land required to build and service a major retail led town centre scheme will often be more than first thought of and given the Council will have prioritised one site, existing landowners may hold out for better conditions for their interests. It is important to note that the fact that the Council owns a significant part of the City Centre itself is a real 'plus' have which should aid delivery;

Comprehensive Retail Led Mixed Use Scheme

5.33 Given the quantum of space, the configuration of anchor stores, the need for servicing, the need for convenient replacement and enhanced car parking, the desire to see genuine mixed use and to achieve strategic goals such as linking up with the waterfront, only a comprehensive approach is likely to deliver all the goals. Piecemeal development is unlikely to achieve the step change required.

Thinking, Facilitation and Well Being

5.34 Lastly the city council will have to show its long run commitment to a new scheme through the use of its planning, landowning and compulsory purchase powers. In this regard the new compulsory purchase powers set out in the Planning and Compulsory Purchase Act 2004 and accompanying circular 06/2004 require local authorities to demonstrate that they *think* a scheme will *facilitate* the *economic* and/or *social* and/or *environmental well being* of the community. This "compelling case in the public interest" can be demonstrated through planning policy and corporate polices such as the community strategy. To our minds the key test is whether the local authority think a new retail scheme is of sufficient substance and quality to facilitate the objectives of the Council and it partners (as expressed though planning policy and the Development Framework) to create a vibrant, mixed use city centre with an aspiration to become a European Waterfront City.

5.35 We now turn to potential development areas within the city centre and evaluate their pros and cons.

6 POTENTIAL DEVELOPMENT AREAS

6.1 Within the city centre there are certain areas of focus that require strategic assessment and guidance in order for each area to be fully integrated and holistic, but flexible enough to react to changes in the city centre that may occur in the market or through new developments.

6.2 As part of the Development Framework process, the following areas of the city centre were analysed with a view to focus on potential sites for the enhancement of the retail provision:

▪ Princess Way	▪ High Street
▪ Oxford Street	▪ Wind Street
▪ Castle Square	▪ The Kingsway
▪ St David's Centre	▪ Parc Tawe
▪ The Quadrant	

6.3 The areas highlighted above were assessed in the context of development potential but also in relation to the aspirational uses of that particular sub area/district of the city centre as part of the Development Framework. In developing criteria to assess the key areas that had potential for accommodating a significant quality retail based development, consideration was given to whether such a location could deliver such a development. In the context of this strategy the test that was adopted to test potential delivery was based on the following factors:

- Planning policy
- Design considerations
- Commercial consideration (i.e. likely occupier acceptance; ability to deliver quality retail based development etc)
- Land Assembly (reasonableness of acquisition)
- Development finance and viability consideration
- Sufficient site footprint to accommodate a major redevelopment scheme
- Aspirations contained within Planning Policy and the Development Framework

6.4 As a consequence of this process being undertaken, the rationale for delivering a major retail led regeneration development was centred on the area of the city centre currently occupied by the St David's Centre and the rear of the Quadrant. The reasons for the focus to be on this area of the City were based on the following assessment matrix:

Table 12: Site Options Matrix

City Centre Sub Area	Opportunities	Constraints
Princess Way	▪ The only current available prime city centre development site ▪ Within only two landownership's - Council and headlessee (Thurleigh) ▪ Both Partners in agreement related to sites redevelopment to provide immediate first phase of new quality retail provision ▪ Detailed planning consent granted ▪ Anchor retail tenant secured	▪ Won't, by itself, achieve the critical mass of new quality retail the city centre needs. So a first phase requiring a second phase encompassing the identified scale of scheme outlined in the report after it
Oxford Street	▪ New retail provision would enhance the existing prime retail location. ▪ Concentration of development in prime retail core (policy CC2). ▪ Opportunity to provide quality, modern retail space in central location. ▪ Good links to the Quadrant. ▪ Good links to Swansea Market. ▪ Good links to Castle Square. ▪ Opportunities for integration with Kingsway and High Street. ▪ Opportunities for linkage to public transport nodes (bus station and railway station). ▪ CCS has a land interest.	▪ Area is constrained by location (i.e. sites are tight). ▪ Limited space and potential for "step change" for city centre retail. ▪ Historical failures of the Castle Quays scheme - negative perception and lack of viability/deliverability ▪ Lack of current sites that are unoccupied and readily available. ▪ Servicing issues. ▪ Development unlikely to direct activity towards the waterfront or Tawe. ▪ Does not allow for a step change in the layout of the city. ▪ Reduces the opportunity to extend the centre into another part of the city. ▪ Issues relating to multiple land ownership. ▪ Disadvantage of replacing "like with like".
Castle Square	▪ Concentration of development on main retail pitch ▪ Development would compensate the loss of the House of Fraser/David Evans anchor. ▪ Development would compliment the proposed Princess Way scheme in the old David Evans store ▪ Opportunity for linkage to railway station ▪ Opportunity for linkage to the High Street ▪ Opportunity for linkage to "leisure uses" on Wind Street ▪ CCS has a land interest.	▪ Lack of development opportunities now that scheme is proposed on former David Evans site. ▪ No critical mass; ▪ Requirement for public space restricts developable footprint in the area. ▪ Requirement to respect the visual, culture and heritage aspects of the Castle.
St David's Centre/Quadrant	▪ Area is within and immediately adjacent to the "retail core" area as covered by policy CC2 of the emerging UDP. ▪ Ability to bridge and link up the city's commercial core with its waterfront; ▪ St David's is currently a failing centre which has a lack of quality retail. ▪ Opportunity for linkage and relationship/extension of the Quadrant. ▪ Site includes prominent gateway sites on corners with Oystermouth Road ▪ Site could be serviced form Oystermouth Road ▪ Redevelopment opportunities could provide the requirement for modern retail space and critical mass.	▪ Pull of the commercial centre southwards ▪ Physical constraints relating to listed buildings (two churches). ▪ Negotiation required with owners of the existing St David's centre and owners of the Quadrant. ▪ Physical constraints - e.g. current Tesco building configuration (but this is also an opportunity re a anchor/potential) ▪ Challenge of calming Oystermouth road for pedestrian access to waterfront at same time as maintaining and enhancing its capacity to service new retail scheme (but an issue re linkage to waterfront, not re viability of scheme

	▪ Opportunity to create a prime retail circuit. ▪ Opportunity for linkage to Oxford Street. ▪ Linkage to bus station/interchange. ▪ Opportunity for linkage across. Oystermouth Road to the waterfront/Swansea maritime. ▪ Possibility of creating a new square/focus (possibly around the churches). ▪ Existing car park as part of the centre (enhanced or refurbished). ▪ CCS has a land interest.	itself)
The Kingsway	▪ Important Gateway Corridor. ▪ Existing A3 development offers different market to Wind Street ▪ Good access and servicing potential. ▪ Good integration with public transport ▪ Opportunity for enhancement of secondary retail space. ▪ CCS has a land interest. ▪ Physical and aesthetic enhancement required.	▪ Has become very secondary ▪ Unsuitable for primary retail frontage. ▪ Multiple land ownership. ▪ Multiple occupiers. ▪ Currently active (particularly night time economy). ▪ Negative perception as a frontage/focus of the centre. ▪ Limited footfall activity. ▪ Focus is on transport hub.
High Street	▪ Important Gateway Corridor. ▪ Opportunity for better integration with the station. ▪ Opportunity for better integration with prime retail area. ▪ Opportunity for secondary retail. ▪ Opportunity for community uses. ▪ Focus on mixed use development and links with college. ▪ Urban Village.	▪ Unsuitable for primary retail frontage. ▪ Physical constraints - some listed buildings exist. ▪ Requirement for reuse of buildings rather than redevelopment. ▪ Limited footfall activity at present.
Parc Tawe	▪ Important retail site for bulky goods in out of centre location but within overall city centre boundary ▪ Opportunity to clawback bulky goods expenditure from other retail park centres ▪ Gateway site to Swansea City Centre. ▪ Opportunity for linkage to River Tawe. ▪ Opportunity to create a pedestrian linkage from Tawe/SA1 to the city centre. ▪ Opportunity for a landmark development. ▪ Opportunity to introduce redevelopment reconfiguration of retail units subject to all national and local plan polices ▪ Opportunity to provide an element of further mixed use over time (retail & leisure presently plus community i.e. Plantasia) ▪ Opportunity to resolve future of “Plantasia” ▪ Opportunity to “soften” hard retail park environment; ▪ CCS has a land interest.	▪ Site is within city centre boundary but acts as out of centre car borne facility. ▪ It is excluded from “retail core” boundary as designated in Policy CC2 in the draft deposit UDP. ▪ Existing retail is focused on retail park units rather than High Street formats, plus leisure ▪ Plantasia is a development constraint to the Phase 1 element. ▪ Car parking is currently inadequate. ▪ Physical Constraints - difficult to integrate into the city centre. ▪ Negotiation with the existing owners of the two phases of Parc Tawe. ▪ Physical Constraints - distinct level change between Parc Tawe and Castle area. ▪ High street retail uses would have major adverse impact on vitality and viability of prime retail core. ▪ New high street focus would be in direct competition to Quadrant/Oxford Street and should be resisted.
Wind Street	▪ Vibrant night time economy. ▪ Established A3 development focus. ▪ New development activity (Salubrious Place - hotel/casino etc). ▪ Opportunities for links to cultural .quarter (Dylan Thomas Centre, Museum etc).	▪ Limited opportunities for large scale retail development. A leisure based strategy for this area has proved a great success in any event. ▪ Multiple occupiers and land ownership. ▪ Physical constraint of Oystermouth Road

	▪ Opportunities for links to waterfront/seafront. ▪ Opportunities for links to SA1 Swansea Waterfront development. ▪ Opportunities for better links with retail core.	▪ Need for improved links to the retail core. ▪ Need for improved integration across Oystermouth Road.

Conclusions

6.5 In summary, the key conclusions derived from the development site matrix are as follows:

- The existing St David's centre is a failing centre that lacks integration with the existing core retail area. It is a high profile gateway location but is currently an underused brownfield asset within and immediately adjacent to the retail core area as designated in the draft deposit UDP at Policy CC2. The current retail floorspace provision is poor and there is a major opportunity to provide modern retail space in this location, rather than improvement through reconfiguration or visual enhancement.
- The St David's area adjoins and could link with the rear of The Quadrant area to form one large strategic development opportunity area which would provide a natural extension of the prime retail core southwards. Together the area would accommodate a large and comprehensive retail led mixed use scheme of sufficient quantum to provide the critical mass and step change that is required. There is no other such site in the city centre.
- The St David's Centre and surrounding area provides an opportunity to create a prime retail circuit that links directly into the prime retail area of the city, Oxford Street and the Quadrant (possibly through an extension which for commercial consideration would be highly desirable). The advantage of this would be that the retail focus would still be concentrated in this part of the city centre and redevelopment would compliment and improve provision, rather than providing "competing schemes".
- The St David's Centre area also provides opportunities to incorporate the site occupied by Tesco, either through improved linkages with the foodstore, or through physical redevelopment which could involve expansion of this store or, if it's relocation, if another appropriate anchor can be secured. The Tesco development is currently a major anchor of the city centre.
- In addition to physical redevelopment and city centre enhancement, the site provides a more strategic opportunity for creating much improved links across the Oystermouth Road to the Leisure Centre, Civic Offices and the seafront. This links in with a key goal in the Development Framework strategy of "Crossing the Divide" and linking to a new mixed use seafront development at Paxton Street.
- In sequential test terms Parc Tawe is an out of centre location being reliant on car borne traffic, with poor pedestrian access to the retail core involving major site level changes. It is however an established and important retail location aimed at bulky goods and in retail terms should remain so. Inclusion of high street retail uses would adversely impact on the vitality and viability of the designated retail core. Moreover, any significant loss of bulky good provision could lead to pressure from other out of centre locations to "take up the slack".
- Within the adopted Local plan the Oxford Street/Princes Street area remains designated as the location for a major retail scheme promoted as Castle Quays. Thurleigh Developments are currently proposing to redevelop the House of Fraser block (David Evans), known as the Princess Way scheme. We note early concept

plans have also been put forward for redevelopment of the “M&S” block. However, we consider that the remaining part of Castle Quays on its own or indeed in concert with the Princess Way block would not now provide the critical mass and most important the comprehensive new department store anchored scheme to effect the step change that is needed in Swansea. Moreover, since Castle Quays designation much has materially changed in the city centre. Improvements to the high street have or are to be made and this area is taking on a new night time economy character. Kingsway itself no longer functions as part of the prime retail core and the centre of commercial gravity has moved southwards in response to other changes e.g. development of the gas works site as Tesco. The growing success of the cultural and museum quarter to the south is also part of this process.

7 SPECIALIST RETAIL PROVISION

7.1 We have deliberately focused on what we consider to be the priority requirement in Swansea as far as retail is concerned – the planning and delivery of a major comprehensive retail development within the city centre core area.

7.2 However, we are also aware of CCS's aspiration for a part of the city centre to provide within the Development Framework a specialist retail area to create distinctiveness within city centre provision. We consider such specialist provision is also important as part of a diverse retail offer and to attract all parts of the potential catchment, e.g. the young.

7.3 The justification for retail led regeneration concentrates on increasing the quantum of quality floorspace within the city centre core area. This provision is however primarily centred on increasing fashion retailing within the centre and providing quality space for high quality multiple retailers and department stores to invest in the city centre.

7.4 While this is an essential component of delivering city centre regeneration, there is a need to ensure that Swansea offers something distinctive in terms of retail and there is an element of specialist shopping within the city centre. This aim is important not only for the character of the city but is an essential part of the vision expressed by the City Centre Partnership in ensuring that "by 2020 Swansea will be a distinctive European City".

7.5 To implement this vision and deliver specialist retail to Swansea the following building blocks must be in place:

Confidence in the Swansea Retail Market

7.6 At present there is a negative perception about the city centre as a retail destination. It is important that early successes (such as the redevelopment of House of Fraser) enhance the city centre as a destination.

Enhancing Retail Provision

7.7 Delivering a high quality significant retail development within the city centre to increase the profile of the city centre and increase investment and expenditure.

Creating a Strong Retail Circuit

7.8 This will anchor and reinforce traditional prime pitches, allowing linked trips between any new development and current prime pitches.

Providing the Critical Mass and Commercial Attractions

7.9 Providing this to maintain and enhance the sub regional retail role and to allow Swansea to achieve its potential as a visitor and European regional capital roles

Encouraging Specialist Retail

7.10 Increasing retailer confidence in the city centre will encourage niche/specialist retailers to invest in Swansea. It is therefore important that opportunities exist for smaller retailers to thrive in the right location and in the right size units. Whilst it is unlikely that these retailers will form part of a large scale redevelopment scheme it will be important that an area of the city centre is earmarked and protected for such uses so that specialist retailers can thrive on the spin off/success of the any new development.

Protecting and Delivering Specialist Retail

7.11 In analysing the emerging dynamic of the city, such retail could be earmarked on Oxford Street towards the Grand Theatre. This is currently a secondary retail area but through the right environmental improvements has the potential for increased level of focus and vitality.

7.12 In summary, we consider the delivery of specialist/niche retailing will follow the successful delivery of a major retail development which will increase confidence in the Swansea retail market.

8 RETAIL STRATEGY & POLICIES FOR SWANSEA CITY CENTRE

8.1 Prior to the commencement of the Strategic Framework for Swansea City Centre the Council adopted an interim retail strategy for Swansea City Centre in May 2005. A key part to this interim strategy was the promotion of the redevelopment of the former House of Fraser/David Evans building to ensure its delivery. In addition to this, it was recommended that the Council adopts the interim strategy, pending the outcome of the Strategic Framework.

8.2 The work undertaken as part of the Strategic Framework has moved on from the interim strategy and a new retail development strategy is outlined within this section.

Overall Strategy

8.3 We consider a retail development strategy for Swansea city centre can be simply expressed as:

- Plan for and promote a comprehensive retail led mixed use scheme within or immediately adjacent to the current retail core as designated in Policy CC2 of the draft deposit UDP. We consider the only opportunity of sufficient scale and location is the St David's Centre and rear of Quadrant area. A detailed planning and development brief for this *strategic development opportunity area* needs to be prepared and adopted as statutory policy as soon as possible
- Encourage the redevelopment, reconfiguration, refurbishment of other frontages within the prime retail area (policy CC2), in so far as they are not prejudicial to the main priority of promoting the major new scheme and comply with all other plan polices. This will require a combination of the uses of the council's planning and landowning roles
- Actively encourage a specialist quarter in a finer grain area of the city centre such as around the Grand Theatre, recognising that the biggest boost to such an offer will come off the back off a strong and vibrant mainstream high street offer which brings additional expenditure into the city centre which can spin off to the specialists
- Outside the retail core apply the need, impact and sequential tests, recognising that there are some strategically important development sites (Paxton Street in particular) which will benefit from a small ancillary element of complementary retail use such as leisure retailing or food and beverage to create lively ground floor frontages
- Ensure Parc Tawe remains an important retail area aimed primarily at bulky goods retailing and associated uses such as commercial leisure or hotel. Encourage a greater mix of uses including residential and business over time and better pedestrian linkage to the city centre retail core. Resist any non-bulky or high street comparison retail use as this would adversely affect the vitality and viability of the retail core and be prejudicial to the St David's/Quadrant proposal
- Encourage the extensive enhancements in the quality of car parking provision within the city centre

Need Implications: Food/ Convenience Provision

8.4 The RTP study states that there is no quantitative case for any further convenience or foodstore provision up to 2016. Any further foodstore provision would have to be justified on qualitative grounds such as increasing consumer choice, local convenience or infill gaps in the market. This suggests small scale food shop development if any.

8.5 It would therefore be perverse for any retail strategy underpinning the Strategic Framework to actively promote additional major food store provision for Swansea city centre. There are already two major city centre foodstores – to the rear of the Quadrant (Tesco's) and on the Tawe (Sainsbury). Whilst we understand that Tesco are seeking to expand their store in situ (and Sainsbury may at some point seek to do the same), these operators would have to justify these increases on the need, impact, sequential tests and other relevant planning consideration set in planning policy.

8.6 It follows that to actively allocate an additional major food store at Parc Tawe, or indeed any where else for that matter, would be a flawed planning policy, as it would have to rely on the relocation of an existing store effectively flipping over its existing consent and justifying any further floorspace over and above this.

8.7 Whilst in practice relocation of a store could happen for other reasons e.g. to facilitate other strategically important development projects such as St David's/Quadrant (see below), the strategic framework and subsequent planning policy cannot actively promote this.

8.8 For example, if an existing operator did not relocate, or a new entrant outbid one of the existing retailers, then the city centre could end up with three major foodstores when there was no identified need for such an additional store. This would of course in all likelihood lead to existing operators objecting to any planning application in order to protect their position citing adverse impact on existing established uses.

Need Implications: Non-Food/Comparison

8.9 RTP forecast capacity for future comparison or non-food retail. Given the existing and evolving planning policy and the strategic framework's objective to see the city centre's retailing role enhanced as part of the waterfront city approach, then by definition Swansea is looking to gain market share and claw back trade lost to out of centre locations and competitor town centres.

8.10 As such we consider a robust and realistic retail development strategy for the city centre should be based on RTP's scenario 2. Looking at this more closely it appears that some 16,350 sqm net could be justified by 2011, rising to 35,550 sqm net in 2016.

8.11 We note that RTP consider that some 56,000 sqm could be justified by 2016 in gross terms and when all other services are added in. In our view this figure is capable of being misinterpreted as retail capacity figures are normally expressed in net sales area terms as opposed to gross figures and do not usually include other services such as A2 uses and alike.

8.12 It is unfortunate that the higher 56,000 sq m figure appears in the draft deposit UDP as this suggests that there is more capacity than there actually is within the city centre. Whilst on the one hand this could be construed as good news, i.e. Swansea sending out the message that it can accommodate large volumes of retail space, it is equally the case that others (say promoting edge or out of centre sites) can argue forcibly for their schemes in addition to a sequentially preferable site on the basis there is more than enough identified need. Indeed they could argue that unless this additional space is provided then the surplus expenditure will leak out to other competition centres.

8.13 We recognise that Swansea city council as landowner has the power related to key sites to prevent inappropriate retail development (either in quantum or type of retail proposed) e.g. on Parc Tawe or Oxford Street east, but this does not mean a developer could not seek and obtain planning consent for a potentially competing scheme, which by itself could cause confusion in the retail/property market and hence damage the chances of delivering the identified priority redevelopment.

8.14 In this context whilst we understand the current owner/developer (LXB) of Parc Tawe phase 1 looks to be promoting a foodstore and large format unit based scheme (within the existing open A1 consent), the City Council must protect itself against any future proposal for a different scheme e.g. one with a greater proportion of unit shopping or large format space associated with retailers that we consider should be within the retail core.

8.15 This would create confusion in the marketplace, with schemes appearing to compete for retailers. Given comprehensive town city centre schemes (with different land interests and the almost inevitability of CPO) are inherently more time consuming to pull together than edge or out of centre schemes, the result could be edge or out of centre sites such as Parc Tawe winning an early consent and arguing that their scheme can go ahead first with a full town centre scheme following at some later date.

8.16 This in turn could put pressure on the city council as landowner to facilitate early schemes. We would strongly caution against this inverted phased approach as it could delay a comprehensive town city centre scheme to a point where Swansea retail core's decline had become so advanced that it would be no longer possible to promote a comprehensive step change scheme.

Current and Potential Proposals

8.17 In our view the relevant figures in respect of net additional retail space which the Council could provide for is 35,500 sq m net by 2016. We must however estimate in very broad terms how this headroom is likely to be consumed over what period and the effect on the quantum of comparison floorspace that is likely to be available. The table below summarises our understanding of current or potential retail schemes.

Potential New Retail Developments	Previous Floorspace	Potential Floorspace / Net Additional
Princess Way/David Evans Redevelopment (detailed planning consent granted November 2005)	There are no specific figures for the net amount of floorspace lost when David Evans store closed in 2005. Using reasonable assumptions and Goad data development it is estimated that the store was in the region of 5,570 sq.m (60,000 sq.ft) net. New retail scheme of 6,483 sq.m (69,792 sq.ft) has been granted detailed planning consent.	Net additional retail floorspace as a consequence of redevelopment is circa **1,000 sq.m (10,000 sq.ft).**

Princes Street/ Oxford Street draft proposals submitted by EWA in June 2005	There are no specific figures given in the proposals for the amount of floorspace lost as a consequence of the redevelopment... Using reasonable assumptions and Goad data development is estimated that current floorspace of this block is in the region of 15,100 sq.m (163,000 sq.ft). Indicative proposals include two floors of retail development containing circa 15,000 sq.m (161,500 sq.ft).	Net additional retail floorspace as a consequence of redevelopment is **circa 0 sq.m (0 sq.ft).** However, floorspace figures do not tell the whole story as the new space would by definition be more efficient and consume more expenditure than the current inefficient space. The net effect would therefore be consumption of part of the headroom forecast by RTP but at this stage the exact impact is uncalculated.
Parc Tawe phase 1. Concept proposals by LXB	We understand LXB's proposal are at present for major food store, large format retail units for bulky goods operators and hotel use We understand that LXB are not proposing any net addition to the already consented space at Parc Tawe phase 1, rather a redevelopment within that floorspace limit. As noted above whilst there may be no net additional space in floorspace terms, the impact in terms soft expenditure and trade diversion on the retail core will need to be carefully monitored and if a planning application is submitted the Retail Impact assessment carefully examined. Any redevelopment may result in the loss of the cinema/leisure uses in their current format.	Net additional retail floorspace as a consequence of redevelopment is **circa 0 sq.m (0 sq.ft).**
Aspirational Development at St David's Centre / Quadrant area	On the basis of the indicative plans within the Development Framework, the loss of current retail space (using reasonable assumptions) is circa 15,000 sq.m (161,500 sq.ft) of gross floorspace. New retail development of a minimum of	Net additional retail floorspace as a consequence of redevelopment is circa **17,500 sq.m (188,500 sq.ft).**

	32,500 sq.m (350,000 sq.ft)	

Figures based on reasonable assumptions at the time of this report.

8.18 On the basis of the above, conclusions can be drawn on the likely phasing and consumption of identified quantitative capacity and hence priorities for schemes.

8.19 We consider that the overriding priority is to plan and deliver a comprehensive retail led mixed use scheme at St David's and Quadrant. The lead in times for such schemes are long and can take anywhere from 5 – 10 years from conception to opening giving the planning and land assembly issues involved. Clearly the quicker it can be delivered the better for the overall regeneration of Swansea.

8.20 On this basis the earliest a scheme would be trading would be say 2011, when we know from the RTP work that there would be some 16,350 sq m of comparison goods capacity available. In other words taking the St David's and Princess Way schemes together would consume slightly more than the identified capacity, assuming no other significant retail commitments in the meantime.

8.21 Whilst we consider that capacity figure are forecasts and flexibility is required, this implies that the Princess Way scheme could go ahead as an early "pump priming " scheme to attract important new retailers, with sufficient capacity still being available for the St David/Quadrant scheme to open around 2011.

8.22 However, there is little surplus capacity for any other schemes which consume significant levels of net additional expenditure (floorspace) as this would be prejudicial to the delivery of the St David's /Quadrant scheme. This scheme would also then need a period to consolidate itself. Only by 2016 would there appear to be any significant surplus capacity for further amounts of retail.

Policy Principles for Key Development Areas

St David's/Quadrant

8.23 We consider there is a pressing need for statutory development plan policy to provide the robust planning policy to promote this site, to justify the use of CPO powers to deliver it and to refuse any other applications which would be considered prejudicial.

8.24 At present the adopted plan still designates Castle Quays, and whilst this has been removed from the deposit draft UDP, there is no site specific policy in support of the St David's area albeit part of the site is within the retail core CC2 policy which is gaining weight in the planning process.

8.25 We believe there have been material considerations since publishing the deposit draft that would allow the local planning authority in any revised UDP to contain a site specific policy for St David's' – not least further assessment of the RTP work and the strategic development framework itself which has been consulted upon.

8.26 Whilst we consider it vital to get the full backing of development plan policy, we also believe it important that the local planning authority produces a planning brief for the site and the landowning authority produces a development brief for the site which would act as a basis for taking forward the delivery of the site and setting out the requirements of the council as landowner vs. a vs. other landowners or the market generally. We consider the preparation of these brief should be carried forward in parallel with adoption of the strategic development framework and the UDP.

8.27 The key planning policy principles would be:

- Provision of a comprehensive retail led mixed use scheme with at least one quality anchor store and associated high street retailing to create a step change in Swansea's retail offer and afford economic, environmental and social well being for the community
- Provision of high quality car parking for the scheme and city centre generally
- High quality CABE friendly streetscape design that creates a retail circuit with the existing retail core
- Provision of enhanced links with bus and public transport interchange
- Integration with the city centre through improved pedestrian permeability and facilitation of high quality links through the scheme offering safe and convenient access across Oystermouth and substantive links to Paxton Street and the Seafront
- Where existing building blocks such as car parks and existing major retail stores physical layout prevent the design, permeability, linkage and commercial layout requirements to facilitate the comprehensive scheme, the city council and its partners will work with such interests to accommodate them on site as far as possible or facilitate off site relocations where necessary in accordance with all other plan polices
- Notwithstanding the above the Council will be prepared to use its CPO powers where there is a compelling case in the public interest to bring about delivery of the comprehensive scheme

Land Ownership

8.28 We understand that the Council, La Salle, Threadneedle and Tesco are all major landowners in the area. There is potential to affect a partnership approach amongst these interests, but there is equal potential for not everyone's interests to be met within the scheme.

8.29 As a consequence of the above there is a need for the Council to set out its objectives in planning and development briefs and seek their adoption in the statutory development plan as these are likely to be tested under cross examination at a planning or CPO public inquiry (or both).

8.30 In respect of Tesco's we understand their desire is to extend their current store onto the car park at the corner with West Way. This looks to be prejudicial to the wider goal of uniting the retail core and city centre with it waterfront and the desire line to the Paxton street development opportunity. This is a clearly a sensitive issue with an operator who has not long built its store and functions as a key anchor within the city centre.

8.31 In this regard the development framework needs to be flexible recognising Tesco can remain as an anchor alongside a major new non-food comparison based anchor. If however this proves impossible either because design objective are not meet or Tesco desire to expand on site are fundamentally compromised, then the Council will need to assists as afar as possible with relocation. In this regard, relocation to Parc Tawe is a possibility. Subject to the planning policy issues set out below this could in principle be an appropriate move which would facilitate both the comprehensive retail scheme and Tesco's desire to expand significantly. However, this off site route should only be supported if the Council is firstly satisfied that retaining Tesco on site is not an essential ingredient to the successful implantation of the new 'strategic development scheme'.

Parc Tawe

8.32 We have noted that Parc Tawe is an established open A1 consent retail area, and as such it should provide a very useful bulky goods retail role for Swansea. That role is currently compromised by store configurations, car parking provision and layouts and intense competition for other bulky good locations.

8.33 Whilst an established retail use with open A1 consent and within the designated city centre boundary, Parc Tawe is not within the adopted plan prime shopping frontages policy S1 or the evolving draft deposit UDP policy of CC2. It functions and operates as an out of centre site and should therefore be subject to all the sequential, impact and needs tests.

8.34 We consider the policy principles should be:

8.35 Retain predominately in bulky goods use

- No significant rise in level of bulky or other retail goods

8.36 No foodstore designation but any planning application for such would need to be accompanied by a retail impact assessment demonstrating capacity and acceptable impact on the retail core and other established centres in the hierarchy in the context of the RTP findings

- Consider a minimum unit size policy for Parc Tawe to prevent subdivision or conditions (subject to what original planning consent says)
- Encourage celebration of gateway function of site but to improve its image through public art, iconic feature, whilst recognising the need for commercial requirement of site lines, accessibility, car parking arrangements which would suggest no curtain building blocks on approach to Parc Tawe, but to encourage design to be less like an out of centre retail development
- Encourage greater mix of use in redevelopment proposals e.g. over redeveloped or reconfigured units or on side frontages
- Encourage environmental improvements programme
- Encourage much improved pedestrian links to the retail core and city centre generally
- Provide a solution to the existing Plantasia use.

Land Ownership

8.37 CCS has a significant land owning interest at Parc Tawe and through this could withhold consent to affect works. We also understand there is a covenant preventing the use of any part for convenience retail. The future of the Councils Plantasia will also influence the timing and content of any scheme.

8.38 CCS should take a proactive stance with the current owners on the basis of the above policy principles.

Oxford Street

8.39 Early concepts for redeveloping the Oxford Street block which contains M&S have been presented to the City council.

8.40 The policy position appears to be that the entire block is within the adopted local plan Policy S1, and that this block forms the main part of the Princes Way (Castle Quay) scheme in the adopted Plan. Whilst the deposit draft UDP removes this designation, the block remains within the S1 and CC2 designations as prime retail.

8.41 We have noted our view that this block no longer provides the right location or critical mass to make the step change in Swansea retail offer. That said we recognise that any application for redevelopment of the block would meet a number of national and local plan polices. For example as a retail core site, the applicant would in theory not be required to demonstrate need, impact or by definition the sequential test.

8.42 In practice we would expect the local planning authority to require an impact assessment to assess internal impact. However, as we have already noted that if this scheme were to come forward before St David's, then there would be plenty of quantitative capacity. In any event it appears that the net additional retail would be comparatively small but this would need to be examined closely in any application.

8.43 That said we have concerns on both planning and commercial grounds that early development of this site could be prejudicial to the St David's area scheme. In practice the scheme would soak up demand from a number of high street names which are not currently represented in the city or who would relocate to bigger units. Whilst in the short term this is a benefit it would deprive St David's of a number of the retailers who would effectively occupy and fund the St David's scheme.

8.44 One beneficial effect of a scheme would be to keep Swansea "on the radar" of retailers and investors. However, the detrimental effect would be to reduce any further interest in the town for some while after the M&S block scheme and at best significantly delay the delivery of the comprehensive St David's area scheme.

8.45 On balance our commercial view is that a redevelopment of the Oxford street block (if it were to go ahead) would be prejudicial to the planned delivery of the St David's area comprehensive scheme and should be resisted, until after it's redevelopment.

8.46 If Swansea had a stronger retail offer than it currently has, we might take a less cautious view of the proposal, but at this stage in Swansea development we consider it would divert key traders away to a location which would not serve the overall strategic goal of uniting the city centre with its waterfront.

8.47 However, as we have noted it may be difficult for the local planning authority (subject to all other material considerations) to refuse such an application on land use and retail planning grounds. Swansea as freeholder may therefore have to use its land interest if it considered this would prejudice the St David's scheme.

UDP frontage policy

8.48 We have referred to the draft report UDP plan policy CC2 which designates prime retail frontages as apart of the "retail core".

8.49 We consider the LPA should re-review such frontages in a revised UDP assessing whether it is beneficial to maintain prime frontage in areas such as Kingsway which are now clearly secondary and where in commercial terms the market has moved southward in the city centre.

8.50 In this regard the development framework makes no proposals for major new retail development in areas such as Kingsway, rather a combination of environmental, traffic and management improvements to ensure these areas adapt to their new roles.

8.51 In this context maintaining prime retail frontages in these locations attempts to perpetuate the old pattern of retailing and urban structure, effectively designating too large a prime shopping area. This gives owners/developers a policy tool to divert the council's new and evolving strategic framework.

9 RELATIONSHIP TO PAST DEVELOPMENT PROPOSALS

9.1 Following the outline of a new retail strategy for Swansea City Centre, it is helpful to outline the background to the Castle Quays and the reasons why this strategy has moved away from this type of scheme.

Castle Quays

9.2 The original Castle Quays scheme, which was created by the development market, essentially aimed to provide the city with a significant amount of modern retail space, including a redeveloped House of Fraser store (as a crucial anchor retailer). The original scheme concept centred on an area of principally secondary retailing to the rear of Marks & Spencer, Bhs and House of Fraser, immediately to the north of Oxford Street. The scheme was based on a replacement department store for House of Fraser, together with some 40 unit retail stores and an element of A3/restaurant uses particularly around Castle Square.

9.3 The Quadrant and the Castle Quays schemes were aimed at being complementary to each other, with Castle Quays essentially helping to "rebalance" the city centre through the reinforcement of Oxford Street and the High Street area.

9.4 Despite extensive attempts to create a viable scheme over a prolonged period the Council has since taken the decision that it is no longer possible to achieve this for the Castle Quays concept. This decision was made principally due to the fact that House of Fraser (who were to anchor the scheme) ceased trading in the city and it was considered there was no reasonable alternative anchor for the scheme.

9.5 As a consequence of the above, it was considered that the scheme at the time was not deliverable due to:

- No realistic major retail anchor to replace House of Fraser on this site/scheme which is fundamental
- A break up of the original development partnership
- No completed planning application
- Due to the above, it is unlikely that the scheme would attract additional retailer interest and commitment vital to secure its delivery
- As a consequence there would also not be an ability to attract the associated development finance.

9.6 As this report has demonstrated the failure of this scheme does not remove the fact that there still remains an urgent need to enhance the city centre's prime retailing provision. This improvement is centred on the need to strengthen its range of anchors and the overall mix and quality of units, firstly to meet outstanding retail requirements but also to react to the increasing competition in and around the catchment area.

New Proposals as Part of this Strategy

9.7 This strategy has centred on the need to Plan for and promote a comprehensive retail led mixed use scheme within or immediately adjacent to the current retail core of a sufficient scale and critical mass. The location for this development is the St David's Centre and rear of Quadrant area and whilst comparisons will be made with the original Castle Quays concept, the following points need to be taken into account:

- The St David's / Quadrant area offers the opportunity for a scheme of significant critical Mass to provide modern retail units and appropriate anchor store (s) that are required to provide the step change required. In comparison, the area of Oxford Street formally proposed for the Castle Quays scheme does not have the critical mass and this is further exacerbated by the current Princess Way scheme which reduces the original Castle Quays area.
- A large proportion of the Castle Quays scheme was in prime retail areas which is difficult in terms of land assembly and viability. The St David's centre is currently a secondary area with a high vacancy rate.
- The St David's / Quadrant area provides more flexibility in relation to design and scheme proposals, particularly the opportunity for greater synergy with the Quadrant Centre, options relating to Tesco and the creation of a strong retail circuit. This will be attractive to potential developer's and investors in relation to scheme viability but also to end occupiers in terms of the creation of a strong retail circuit.
- The St David's / Quadrant area has the potential to offer high quality access from Oystermouth Road as well as the opportunity for improved car parking provision for the scheme, essential to attractive to developer's, investors and quality end occupiers. In addition, new development in this location provides a visual profile off Oystermouth Road and an opportunity for prominence that will appeal to anchor retailers. The Strategic Framework proposals for linkage to high quality mixed use waterfront development at Paxton Street will also be an attractive ingredient when promoting a development in this location.
- Since the decision not to pursue the Castle Quays scheme, the retail market within the UK has gone through an element of change. There is a need for greater flexibility when in delivering development and in some cases, retail schemes are not solely reliant on one anchor, such as a department store. The flexibility of the St David's / Quadrant area provides the possibility, if required, for there to be a number of smaller "anchor stores" if required by the market. This offers greater flexibility and means that the scheme is not solely reliant on the delivery of a department store in its traditional format.
- There is a growing perception of Swansea is a growing city with new development and vibrant economy. Since the Castle Quays scheme proposals the city has delivered successful developments at Wind Street, proposals for short term wins at Princess Way and the new bus station interchange as well as new residential development proposals, the Leisure centre, Liberty Stadium and National Waterfront Museum. The Strategic Framework proposals, in addition to the above will provide developer confidence within the market place.

9.8 In addition to the above it is important to acknowledge the role of the key stakeholders within the St David's / Quadrant area. The freehold ownership for the majority of this area is controlled by the Council but there has been dialogue throughout the Strategic Framework process with the main stakeholders that control the head leases on the Quadrant Centre and St David's Centre. It is important part of the delivery process for there to be an agreement in principle between all parties to the formulation of a partnership to promote the Council's vision through the selection of a preferred Development Partner.

10 DEVELOPMENT VIABILITY

10.1 The best defence against any potentially competing proposals for St David's is the Council's ability to justify refusal on prematurity as well as prejudicial grounds. In this context the Council needs to demonstrate it has considered its options and identified a location which is viable and capable of being delivered within a reasonable timescale. We have dealt with the planning policy aspects of this, we now deal with commercial viability.

St David's / Rear of Quadrant

10.2 For the purposes of the Swansea City Centre Development Framework only, Donaldsons has carried out a broad based indicative appraisal on the preferred option for The St David's area site. The development proposals for this area, established as part of this development seek to enhance retail provision within the core shopping centre, seen as an important tool in delivering the regeneration of the city centre through retail development.=

10.3 Significant development focus is concentrated on the existing failing St David's Centre that lacks integration with the existing core retail area and is failing. The current retail floorspace provision is poor and there would be a need for significant redevelopment to provide modern retail space in this location, rather than improvement through reconfiguration or visual enhancement. This site also offers opportunity for an extension to the Quadrant Centre and links to the adjoining bus station and across Oystermouth Road

10.4 As part of the exercise undertaken reasonable assumptions were adopted with the main aim being to establish whether any considerable commercial viability obstacles existed in delivering the right type of development in this location.

10.5 The main commercial rationale underpinning the mix of uses for the particular site was focused on the need to replace the existing failing shopping centre with modern retail and A3 units that provide both a draw and a defined retail circuit within the core shopping area of the city. In addition to this, and to develop a mix of uses within the city centre, a quantum of commercial office space and residential were included on upper levels on the assumption that they do not affect delivery of the main aim of the development, which is to provide a step change for the city centre.

10.6 The following assumptions were made regarding value components:

- Conservative estimates on rents and investment yields for retail
- Department or variety store provision and units to be targeted at main end occupiers
- Options where Tesco either remain, but their link to the city centre is reinforced, or they relocate offsite if an alternative anchor(s) is identified
- Conservative estimates for other land uses to reflect current development pipeline
- New multi storey car park within the development with flexibility to also provide this on the other side of Oystermouth Road if commercially viable. The latter may provide a less constrained site with opportunity for greater linkages and maximising of revenue and developable area.

10.7 The following assumptions were made regarding costs:

- Upper quartile build cost estimates from BCIS data
- Significant reverse premium for the department/anchor store operator and tenant inducements for other retail space

- CPO and site assembly costs
- Assumptions relating to demolition, infrastructure, contingency, professional fees, interest/finance, phasing and developer profit.

10.8 In conclusion, it is Donaldsons view that a significant development of this kind (approx 35,000 sq.m) is deliverable for Swansea city centre. In commercial terms the appraisal is based on an indicative scheme using conservative values. What can be demonstrated is that there is potential to facilitate a development, particularly as there are opportunities for flexibility that could:

- Provide car parking on the other side of Oystermouth Road to link the seafront and Paxton Street but also to provide greater site area in the retail core to improve the commercial viability of the scheme through an increase or reconfigured floorspace, greater opportunity to factor in car park revenue and marriage value
- Use the existing Tesco site as an additional anchor to the scheme through site reconfiguration or improved linkage to the retail circuit developed as part of the new development or through expansion of Tesco's principally related to its comparison retail offer.

Parc Tawe Proposals

10.9 The strategic framework proposals at Parc Tawe are centred on the reconfiguration of the existing retail units to create an edge of centre bulky goods Retail Park that has greater permeability with the city centre core. The aim of the framework is to promote development that:

- Complement but not compromise uses in the rest of the City Centre with new investment being controlled in appropriate phases to meet market opportunities while preserving a complementary role
- Retain Parc Tawe in predominantly bulky goods/commercial leisure uses with no significant rise in the level of bulky or other retail goods floorspace, and ensuring that unit sizes do not attract traditional high street retailers
- Encourage celebration of the gateway function of the site through elevational treatment, public art, iconic features, but recognising the commercial development requirements of sight lines, accessibility and car parking
- Ensure a greater mix of uses is included in redevelopment proposals
- Promote a development along the river frontage

10.10 On the basis of the above, it is Donaldsons' view that a reconfigured retail park will be commercially sustainable if the design addresses the failings of the current design which are centred on:

- Permeability and linkage to the city centre
- Adequate car parking to meet the requirements of the bulky good retailers
- Visibility from the access roads into and out of the city centre
- Opportunity for a greater mix of uses including residential development
- Either improving the existing leisure uses or relocating them.

Paxton Street

10.11 The Strategic Framework promotes the development of this area as a mixed use scheme of significant critical mass and focussed on business activity. The development should include high quality office space, bars, restaurants, residential apartments, leisure uses and car parking and if land ownership/development issues can be resolved, the scheme should include a business hotel with an associated conference centre. The key development objectives are therefore to:

- Create a high quality landmark development in a prominent location, particularly serving to improve the competitive business profile of Swansea
- Create a greater critical mass on the seafront alongside the Civic Centre in County Hall, incorporating effective links with the core City Centre
- Use the seafront location to create a destination which generates both formal and informal activity on the seafront, attracting people and businesses, and encouraging movement to and from the core City Centre
- Create the opportunity for pedestrians to easily and safely cross Oystermouth Road

10.12 On the basis of the above, it is Donaldsons' view that these proposals will be commercially sustainable to allow it to be delivered through normal commercial mechanisms subject to:

- Achieving the appropriate mix of uses
- Recognising that the scale of residential and office elements to be included must take into account the pipeline of new developments currently committed, under construction or already on the market in the City Centre, Maritime Quarter and SA1 Swansea Waterfront
- Achieving good quality design to attract occupiers, particularly in relation to offices and other commercial elements
- High quality public realm should be included and delivered as part of the overall to ensure a high quality connection to the core City Centre and considered in conjunction with the proposals for the St David's/Quadrant Priority Area.

Oxford Street West/Plas Grand Theatre Proposal

10.13 The strategic framework proposals at Paxton Street are centred on strengthen the existing role and character of the area by:

- Maintaining the existing structure of uses, streets and pedestrian routes but redevelop and/or refurbish buildings to improve their quality and appearance
- Utilising the opportunity of developing the existing surface car park on Oxford Street to create a new public space in the City Centre and a proper setting for the Grand Theatre, replacing some car parking at basement or semi-basement levels
- Providing new and improved quality specialist shopping "lanes" or arcades, with new mixed use residential and "creative industries" uses, and opportunities for street life

10.14 On the basis of the above, it is Donaldsons' view these proposals may need active intervention by the City and County Council and the Welsh Assembly Government to bring them forward. Although the key car park site is in the Council's ownership and there may be private sector interest, there are multiple land ownerships in the surrounding area, and some proposals will require cooperation. This is likely to demand some feasibility work, and there may be a need for mechanisms to create a development partnership or joint venture. Securing adequate funding for the early stages of the development will provide a significant boost to delivery of the later stages.

11 IMPLICATIONS FOR NEW OFFICE DEVELOPMENT

11.1 This section of the report outlines the implications for office development within the city centre, particularly with regard to the development sites put forward within the Development Framework.

11.2 The facilitation of an office market for the city centre is a high priority to add more office jobs to the city centre which has a knock on effect of raising employment levels and diversity of employment. The increase in vitality and spend in the city centre will ultimately support investment in both in property development and the profile of Swansea as a business location.

Overview

11.3 The key considerations that need to be taken into account with regard to the current office market are as follows:

11.4 Since 2001, the Swansea office market has seen a general increase in take up of space averaging at approximately 107,811 sq ft for the last four years. In 2003 take-up was approximately 137,162 sq ft, an increase of 30% since 2001. In 2004 there was a decline to 120,887 sq ft;

11.5 Trends have historically been centred on traditional space within the city centre with limited amount of quality new space in the centre and availability is concentrated on traditional office space (rents in the region of £6 to £8 per square foot);

11.6 SA1 Swansea Waterfront which includes 65,000 sq.m (700,000 sq ft) of business/office space, which will have a considerable impact on the amount and quality of office space available to the market, particularly in view of the current and historic market. On the basis of current take up outlined above, SA1 Swansea Waterfront alone would provide approximately 6 years supply.

11.7 Matrix Business Park which is located on the Enterprise Park is being phased out by Liberty Properties plc to accommodate a high calibre business park of approximately 23,225 sq.ft (250,000 sq.ft) of office space over the next three years; and [?]

Office Rents

11.8 When considering new office development the issue of rents and ultimate value of office space as part of a development need to be understood:

11.9 Prime office rents have increased over the last 9 years from approximately £8.00 per square foot in 1996 to £12.00 per square foot in July 2004 and continue to rise;

11.10 It is reasonable to assume that rents will move above £13.00 per square foot mark in the short term, particularly once a greater quantum of office development becomes available. Recent activity suggests £13.00 has already been achieved although caution must be applied to some recent deals as the rent achieved has to also reflect and public sector subsidy and incentives; and

11.11 Office rents in Cardiff have levelled off over the past 4 years to approximately £18.50 per square foot. There is still a large gap between the two cities in terms of rent. This firstly encourages potential end users looking for high quality space that is cheaper than Cardiff, but it also allows for an increase in Swansea's prime rents without coming into direct competition with Cardiff.

11.12 It is therefore important to understand the aspirations of Swansea and whether significant high quality space can be provided so that rents can push towards the £14 to £15 per square foot level. This may facilitate private sector development that is not reliant on public sector intervention. However, if private sector development within the city centre remains unviable for the short to medium term, consideration should be given to the use of public sector funding assistance or other potential public sector procurement vehicles to procure office or mixed use development.

Site Specific Issues in Relation to Facilitating an Office Market in Swansea City Centre

11.13 The city centre office market in Swansea is limited and the main focus now relates to out of centre locations, particularly the SA1 Swansea Waterfront development. While the success of such schemes is primarily centred on the supply of quality space within easy access to main arterial routes, the city centre is currently unable to compete on both fronts due to the lack of modern space. It is reasonable to suggest that the current office market in the city centre is underachieving.

11.14 It is therefore important to assess whether the market can sustain high quality office development in the city centre, edge of centre and out of centre locations such as SA1 Swansea Waterfront and Swansea Enterprise Park.

11.15 The key issues are as follows:

- **Phasing/Timing**: It is important for any office development or any development incorporating office space within it, to understand current supply and demand issues at SA1 Swansea Waterfront and elsewhere in and around the city centre. This is important in delivery so that the city centre can compete in attracting quality end users to quality developments in the city centre. It is also important to recognise that SA1 Swansea Waterfront will offer a higher quality environment, car parking and access that currently offered in the city centre in the short to medium term;
- **Commercial Viability**: current rental levels for office development in Swansea city centre need to be compared with current build cost estimates. At present the delivery of new office development on a speculative basis is likely to be uneconomic or marginal to a private developer. In addition, and on the basis of the current supply of office development in the development pipeline, new office development would need to offer significant incentives over and above the normal rent free periods;
- **Incorporation into Mixed Use Developments**: the Development Framework's aspiration is for high quality mixed use development. It is however important to note that in relation to a potential large scale retail based redevelopment, the inclusion of office development may effect the development viability (and ultimately the delivery) of a scheme. It is acknowledged that this should remain an aspiration but should not become a barrier to achieving a step change for retail development in the core city centre.

11.16 On this basis, the following table outlines the current position with regard to the key development sites within the city centre and their suitability for office development. Whilst this table covers the main development areas, the delivery of smaller scale office schemes and redevelopment should also be encouraged providing its timing does not provide a competing development to the delivery of a key aspirational site within the development framework.

Key Sites	Suitability for Office Development
Paxton Street	Paxton Street is earmarked in the Development Framework for a high quality waterfront development that links to the core city centre. This is an opportunity for shifting the focus of office development towards the city centre. It is accepted that the site is currently not part of the core area but through improved linkages (particularly through the delivery of a new retail scheme on St David's this site could act as a catalyst for future office and employment growth.
St David's / Quadrant	On the basis that this site is earmarked for a significant retail development, the concept of a mixed use development incorporating a potential element of office development should be accepted as an aspiration. However, consideration as to timing and release of office space needs to be taken into account as the inclusion of space within this development should not detract from the delivery of Paxton Street or other office development within the city centre. In addition, the desire for office space within large retail development should not ultimately be of the detriment to the delivery of the retail scheme.
Parc Tawe	This area is currently a bulky goods retail park and it is acknowledged that the area should increase its permeability with the city centre but also move towards a mixed use area incorporating residential and office development. This aspiration is seen as a medium to long term strategy due to current demand being absorbed by SA1 Swansea Waterfront and current available space in out of centre locations. Future demand should be directed to landmark developments at Paxton Street and the city centre in the first instance.
Sailbridge	This area has considerable constraints relating to flooding and other abnormal development costs. However, this site is not perceived to be the main focus for large scale office development due to its peripheral nature to the main city centre core and it proximity to SA1 Swansea Waterfront.

Conclusions and Strategy

11.17 On the basis of the above, the following strategy should be developed to assist in the formulation of an office market within the city centre:

- Continue and encourage small scale growth. Major office development delivery in the city centre will be constrained by pipeline of supply in SA1 Swansea Waterfront, (planned at 65,000 sq.m over next 5 to 7 years). This is not to say a development such as Paxton Street cannot be delivered in this timescale, as a landmark mixed use scheme on the periphery of the city centre core will be unique to the market place. In addition to the above, whilst significant growth may be a medium term objective due to short terms constraints, the Development Framework should be flexible enough to enable all opportunities if presented by the market to be pursued;

- Use SA1 Swansea Waterfront as a facilitator to city centre office growth. SA1 Swansea Waterfront should be perceived to be a positive development as even though it is not in the city centre boundary it is within close proximity to the centre and its effectively "creating a significant, sustainable office market" for Swansea;
- Ensure there is a pipeline of city centre sites to meet employment forecasts. Roger Tym and Partners' employment forecasts suggest potential for total approx 130,000 sq.m to 2026 if all office jobs are located in central areas. The development target for the city centre of 70,000 sq.m over 20 years should also be aspirational;
- Provide opportunities for the owner occupation market so that a different supply is created within the market;
- Ensure new employment opportunities are directed to the city centre with a restraint on out of centre development (without constraining significant inward investment opportunities)
- Ensure Paxton Street is a landmark mixed use development (containing office space) that is delivered to the market in the short to medium term;
- To ensure that where commercial, viable office space should be included as part of a new mixed use developments throughout the city centre, particularly in areas such as Oxford Street and High Street. Such space should not effect the deliverability of Paxton Street as a landmark scheme or other developments that may offer a significant step change to the vitality of the city centre (such as a new retail scheme);
- Particular emphasis on office development in Mansel Street/Alexandra Road, Kingsway/Orchard Road or the railway station which could improve activity in secondary areas. These areas could be the focal points for public sector intervention to assist in delivery;
- Consider the Council's own office needs and potential relocation - in part or whole from County Hall, as a catalyst to wider office development – be it at the Paxton Street area, or elsewhere in the city centre; and
- Where appropriate, explore opportunities for the use of public sector funding or other procurement vehicles to deliver new office development in the city centre.
- Implications For New Residential Development

11.18 This section examines the current Swansea city centre residential market and how current and future development proposals will have an impact on the both the market and the residential allocations in the Swansea Unitary Development Plan (First Deposit).

11.19 The general market perception is that within Swansea City Centre there is currently a shortage of available residential property with demand outstripping supply, although at present there are a number of schemes in the pipeline of a significant scale to increase the quantum of residential units within the city centre.

Market Factors & Headline Rates

11.20 It is not the intention of this paper to analysis every residential transaction that has taken place over the past few years. It is however useful to outline the baseline position with regard to residential values and prices. The information to note is that:

- Residential prices in Swansea have followed the national trend by seeing prices rising strongly since the late 1990s
- The city centre, which has traditionally seen a limited amount of new residential investment over this period, has also shown signs of growth
- Price growth suggests that central Swansea prices have doubled over a ten year period to 2004 with the average price being in the region of £85,000
- While the increase in prices has generally followed the trend set by Swansea, Wales and the national residential market, growth has continued to occur in this area due to the lower base than the England and Wales average and hence opportunities existing for investors.

11.21 In addition to the above, the Baseline Report into the Development Framework concluded that the perceived position with regard to residential development in the city centre is as follows:

Investor Market

11.22 The local private investor market in Swansea is suffering from a distinct lack of product, particularly in the less expensive 1 and 2 bedroom units. This type of property normally provides the most advantageous return to the investor.

Professional Market

11.23 In Swansea there is a lack of supply of city centre exclusive apartments that have restricted this sector's impact on the market.

First Time Buyers

11.24 Due to demand, new build city centre apartments are unlikely to be within reach of the majority of first time buyers in Swansea with the exception of the above purchaser groups. There is also an issue of links to the University and employment opportunities, particularly in ensuring that young professionals remain in Swansea through career and lifestyle opportunities.

Local Market

11.25 Swansea city centre is not viewed as a prime residential area by the local market. However, it is important to note that in most city centres, the increase in the level of "city centre living" improves the city centre as a destination location, provides a level of vibrancy outside the traditional retail opening hours and stimulates leisure and cultural activities.

11.26 As a consequence of the above, and on the basis that existing supply is limited, recent evidence suggests sales rates of existing stock in the city centre are around the £200 per square foot mark. This suggests that one bedroom apartments are in the region of £80,000 to £100,000 with two bed apartments in the region of £130,000 to £150,000.

11.27 However, as new developments are brought forward as a consequence of the current development pipeline and the aims and objectives of both the Development Framework and the Draft Unitary Development Plan are implemented, the sales rates should increase.

11.28 This likely trend is reflected in the early stages of SA1 Swansea Waterfront where indications are that residential plots currently being marketed are reaching the £260 to £270 per square foot mark.

Development Pipeline for City Centre Residential

11.29 A number of interesting schemes have recently been introduced to the city centre which will significantly increase the quantum of residential development in and around the core area:

Swansea Point, Swansea Marina

11.30 A new development of 600 units, comprising one and two bedroom apartments and three, four and five bedroom homes. This development is under construction and with 250 units being included as part of the first two phases being delivered in the short term. Individual units are currently on the market and range from £160,500 for a two-bedroom apartment, £255,000 for a three-bedroom penthouse, £242,000 for a four-bedroom house and £435,000 for a five-bedroom house.

Seagate Ferrara Quay

11.31 A new high density residential/commercial scheme in the Maritime Quarter acting as a beacon for the renaissance of the City Centre through the 29 storey Ferrara Tower and 4 smaller towers of 9/10 storeys as well as 6 storey blocks. The residential element will add a further 291 apartments to the existing complement of living accommodation at the Maritime Quarter. The units comprise 138 two-bedroom apartments, 11 three-bedroom apartments, 12 three-bedroom penthouse apartments, 124 one-bedroom apartments and 6 one-bedroom penthouse apartments. Planning Permission has been granted.

St Thomas Riverside

11.32 The proposed development at St. Thomas Riverside consists of 169 no. 1, 2 & 3 bedroom apartments and 50 no. townhouses of Pentreguinea Road. While this site is not actually within the city centre, it is important to note this development due to the type of offer it provides, the quantum of development and also the close proximity to the city centre.

Princess Way

11.33 Planning consent was granted in 2004 for a residential development of 68 residential units.

Brunel Way

11.34 Plans by PMG Estates for a waterfront residential scheme of 560 homes along the River Tawe.

SA1 Swansea Waterfront

11.35 SA1 Swansea Waterfront is within the Development Framework City Centre boundary but the quantum of development that is proposed is significant and will have an impact on proposals for both residential and commercial markets in the defined city centre. The SA1 Swansea Waterfront development proposes the development of 2,000 residential units. This includes H&P Estates planned new 91 apartment scheme and Swansea Housing Associations plans for 78 residential units;

Swansea Urban Village

11.36 The "urban village" scheme is different to the city centre market housing outlined above. The Urban Village, located on High Street, in the city centre is to be developed by Swansea Housing Association. The aim is to stimulate further investment in individual or small groups of properties.

11.37 The above schemes in the development pipeline indicate the large amount of new residential development within the city centre. This is important for the aims of the Development Framework in establishing a city centre with a comprehensive mix of uses supported by additional residential and employment provision. It is also a positive step away from the perception that existing available stock within the city centre is made up of re-sales of older developments.

11.38 It is important to note that the above does not include:

11.39 Other significant residential land allocations contained within the Swansea Unitary Development Plan First Deposit Draft (October 2005);

11.40 Any smaller scale residential developments/refurbishment that could come forward as windfall development over the plan period; and

11.41 Other large scale residential schemes similar to SA1 Swansea Waterfront. For example Llandarcy Urban Village which is within the administrative boundary of Neath & Port Talbot County Borough Council but close to Swansea will providing at least 4,000 homes (and creating an expected 3,200 jobs through employment opportunities) over the next 25 years. The scale of this development may have an impact on proposals within Swansea depending on the phasing and release of the residential development.

Draft Unitary Development Plan (UDP) October 2005

11.42 The Draft UDP identified under Policy HC1 identifies sufficient land to support the development of 13,930 new homes between 2001 to 2016. Within the city centre the following sites have been allocated for residential development:

Policy	Site	Residential Allocation
Policy HC1 77	212 to 221 High Street (Urban Village)	175
Policy HC1 78	Marine Time Quarter (Ferrara)	270
Policy HC1 79	26 to 28 Castle Street	18
Policy HC1 80	30 to 35 Castle Buildings	61
Policy HC1 81	Spontex (Swansea Point)	600
Policy HC1 82	Trawler Road (Maritime Quarter)	55
Policy HC1 83	Wind Street Phase 2 (Salubrious)	20
Policy HC1 85	1 to 7 Princess Way	78
Policy HC1 86	23 to 25 Wind Street	10
TOTAL		1,287

11.43 The above analysis of the residential sites allocated in the First Deposit UDP outlines provision for 1,287 units within the plan period up to 2016. What is clear within the table above is that a large majority of the allocated sites are currently being implemented, particularly the sites that have the potential to release a significant quantum of development.

11.44 It is therefore reasonable to assume that the large majority of the 1,287 units could be implemented prior to the end of the plan period. This is important in relating back to the objectives of the Development Framework, particularly the proposals for the star sites within the city centre as it will be important to continue the development focus on the city centre.

11.45 It is however important to note that the above table does not include 1,500 units allocated in the UDP for SA1 Swansea Waterfront. This quantum has already been commented upon with regard to its effect on the release of land within the city centre. However, what is important, is that this is also an allocation that is currently being implemented, with a steady release of units throughout the plan period.

Issues Relating to Opportunity Sites within the City Centre within the Development Framework

11.46 The following table outlines the current position with regard to the key development sites within the city centre and their suitability for residential development. Whilst this table covers the main development areas, the delivery of smaller scale office schemes and redevelopment should also be encouraged providing its timing does not provide a competing development to the delivery of a key aspirational site within the development framework.

Key Sites	Suitability for Residential Development
Paxton Street	Paxton Street is earmarked in the Development Framework for a high quality waterfront development that links to the core city centre. A significant residential element within this scheme will be essential as a means of creating optimum value to deliver the rest of the development. The type of residential and the timing/phasing will have to reflect market conditions at that time and the take up of apartment style developments at SA1 Swansea Waterfront and Ferrara Quay.
St David's / Quadrant	On the basis that this site is earmarked for a significant retail development, [the concept of a mixed use development incorporating office development should be accepted as an aspiration]. Residential development could improve pedestrian flow and activity outside of the retail trading hours and should be encouraged. Timing and viability of residential in these locations will affect market conditions particularly whether sites within the "core area" are marketable taking into account supply and development pipeline in waterfront locations. Residential may be a more certain mix use element in this scheme than offices which is a key deliverability and viability consideration.
Parc Tawe	This area is currently a bulky goods retail park and it is acknowledged that the area should increase its permeability with the city centre but also move towards a mixed use area incorporating residential and office development. This aspiration is seen as a medium to long terms strategy. Any residential development may have to provide a different market to the supply currently in the pipeline on seafront locations. It is also essential that the residential is not to the detriment of the function of Parc Tawe as a edge of centre bulky goods retail park (i.e. car parking and visibility) as this is the main constraint with the present development.
Sailbridge	Advice from Arup during the Development Framework process has

	highlighted the flooding restriction under TAN 15 which precludes residential development on this site, even above ground floor level.

Conclusions and Strategy

11.47 On the basis of the above, the following strategy should be developed to assist in the formulation of an office market within the city centre:

- Continue and encourage residential development within the city centre to increase population and activity
- Use SA1 Swansea Waterfront and significant schemes such as Ferrara Quay (and the potential of Paxton Street) as positive developments that will increase the profile of Swansea
- Encourage residential development within mixed use developments throughout the city centre, particularly in areas such as Oxford Street, Mansel Street/Alexandra Road, Kingsway/Orchard Road and High Street. The timing, delivery and type of residential units should be flexible enough to respond to market conditions at that time
- Encourage, through partnership with further education bodies such as Swansea College and Swansea University for greater student accommodation within the city centre.

12 SUMMARY & RECOMMENDATIONS

12.1 This report has majored on developing a retail development strategy for Swansea city centre with the input of residential, leisure, civic, cultural and office development as part of an overall mixed use approach.

12.2 This document has focused on retail for good reason. Swansea is currently underperforming in this key sector. SA1 Swansea Waterfront is beginning to put new office and town centre residential life into Swansea, Salubrious Place has put commercial leisure back in the city centre and cultural facilities are growing. However, little of substance has happened with mainstream comparison retail in the city centre.

12.3 Analysis of commercial indicators shows Swansea is not punching its retail weight and has had very little new comparison retailing in the city centre since 1980. RTP forecasts of expenditure growth and capacity or quantitative need for further retail space show leakage away from Swansea. If left unattended, Swansea will continue to see trade and shoppers vote with their feet. Major retail schemes are now also an accepted mechanism in the regeneration tool kit to kick start city centre revitalisation.

12.4 The strategy that has been development within this document is to ensure that Swansea plans for and actively promotes a major new comprehensive retail led mixed use scheme in the city centre. This is not retail for retail sake. The scheme has to engender a step change in both quantitative and most importantly qualitative uplift. Again put simply Swansea now has only one quality department store – Debenhams – a surrogate measure for the poor quality of retail offer Swansea has.

12.5 If Swansea is to have a wider regeneration to achieve a sustainable regional role, capture the unique waterfront city concept and move into the European regional capital destination market, then it needs to substantially up its retail game for both the existing catchment, to attract back shoppers defecting to other centres and to attract greater visitation.

12.6 Whilst the strategy is simple delivery of it is undoubtedly more complex. From a financial and development viewpoint, we believe a step change scheme should be financially viable under the conservative assumptions we have used to test a broad based indicative consult.

12.7 Commercially at present there is little expressed demand from quality retailers to fill such a scheme. However, this in itself is not surprising as many retailers will not even have Swansea on their radar because they know that there isn't the quality space or agglomeration of fashion and lifestyle traders in Swansea to give them the platform from which to trade. In this context it will be the supply of quality space which brings forward the demand. However, securing one or more key anchors will be critical, and at an early stage in the development concepts evolution if it is to be a success

12.8 We have considered a number of areas and locations within the city centre for such a comprehensive retail led mixed use scheme. We have concluded that only the St David's and rear of Quadrant location has the attributes to accommodate such a scheme. It will link the existing retail core with its waterfront, extend but link onto the existing prime retail circuit, and provide the space to physical accommodate and service such a scheme. We have modelled a scheme of at least 35,000 sq m gross retail including two anchors.

12.9 If the City Council wishes to promote such a scheme it will have to say so as both planning and landowning authority.

12.10 Planning policy for such a scheme needs to be enshrined in the statutory development plan (UDP) as soon as possible. We suggest there are sufficient material circumstances for a revised deposit UDP to include a site specific policy for the St David’s area – namely further consideration of the RTP figures and the preparation of the strategic development framework itself.

12.11 However, we recommend that as an interim measure the City council produces detailed planning and development briefs for the site. The planning brief should be consulted upon and be used to both promote the site and defend it against any competing schemes on the grounds of prematurely. Flexibility on this briefs area maybe required to maximise it’s chances of being delivered for example, by potentially crossing into the area over Oystermouth road, either for an element of particularly ‘support’ uses such as a new hi storey car park, and/or to ‘capture’ an appropriate element of enabling value to ensure the schemes viability – and, in parallel, maximise linkage to the waterfront area.

12.12 We recognise that promotion of the St David’s scheme cannot stop everything else in its tracks. In this context we have set out as part of the strategy, polices for dealing with other key retail areas such as Oxford Street and Parc Tawe. We have also commented upon the need to promote other forms of retailing such as specialist traders. In particular, we support the immediate redevelopment of the Princess Way scheme as a crucial initial ‘kick-start’ to the improved quality retail offers the city so urgently needs.

12.13 Lastly we have recommended as part of our review of development sites the role of office and residential development.

Swansea City Centre: Strategic Framework

Technical Appendix 5

VISITOR ECONOMY & DESTINATION STRATEGY

Locumconsulting
creating successful destinations

CONTENTS

1 THE VISITOR ECONOMY

Relevance of the Visitor Economy to Swansea

1.1 The changing economic structure of Wales and previous shocks to the economy such as Foot and Mouth Disease and the post "9/11" travel downturn all serve to emphasise the importance of the "visitor economy" to Wales. It is difficult to summarise and dis-aggregate the "visitor economy" from other elements of the economy since standard industry classification indicates the presence of the "visitor economy elements" in 26 parts of the standard industry classification.

1.2 The following Sectionhas been drafted in a short time period. It is based on existing information on the current state of the Swansea visitor economy supported by information gathered on a visit to the city - much data is reported in the Annex on the Visitor Economy.

Definition of Visitor Economy

1.3 The "visitor economy" reaches far beyond what is classically considered to be "tourism" (overnight stays) and into visitors where the main motivation of a visit is:

- Leisure and Business visits where there is an overnight stay or travel from one economic region to another
- The day visiting behaviour of the catchment beyond Swansea
- Current tourism analysis focuses on the following market segments:
- Overseas visitors staying overnight
- Out of region UK domestic visitors staying overnight
- Those staying in serviced/unserviced accommodation and with friends and relatives
- Day visitors from outside the Swansea economy.

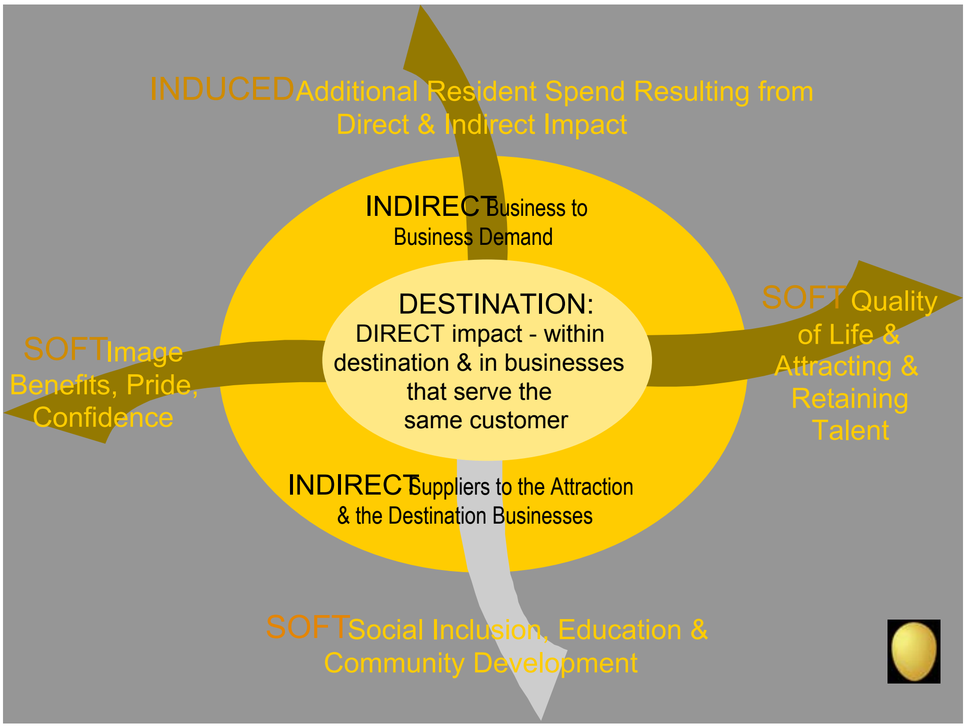
1.4 The city centre visitor economy market would also include those residents within the City & County of Swansea who come into the city for leisure, cultural, educational and business reasons, except where Swansea is their normal place of work. It should be noted that the statistical base for the definition of the visitor economy of Swansea is subject to error.

Benefits of the Visitor Economy

1.5 The benefits of the visitor economy in the city extend beyond the direct, indirect and induced economic impacts arising from the visitor volume and value. The key additional economic benefits are:

- The City brand – a positive city economy enables the city brand to be more aspirational and for this element of the brand to interact positively with other factors such as the attraction of prospective investors. It also assists in creating "pride in place" in the community.
- The visitor economy generates relatively high levels of employment particularly with relation to enterprise formation, entry level jobs and to other opportunities for social and economic inclusion.
- A positive visitor economy can provide a sense of "quality of life" for a city that is itself a driver of investment an din attracting and retaining talent.

1.6 The graphic below illustrates the overall benefits of a vibrant visitor economy.



Summary Analysis of the Swansea Visitor Economy

1.7 At Appendix 1 we attach a detailed review of the visitor economy in Wales, the South west region and in Swansea. Some of the key messages emerging from this analysis are highlighted below:

- Swansea is experiencing moderate growth in the visitor economy
- The key market driver is the hinterland environment not the city centre
- The supply of a critical mass of attractors and business tourism facilities is deficient. The experience of the city centre is not notable or competitively attractive
- We have tested tourism figures available for the City and County of Swansea with an initial estimate of what the City Centre itself may capture in terms of tourist days and sector of expenditure. Both are summarised in the following two tables. In terms of tourist days an initial scenario test is that 80% of tourist days to the City & County of Swansea are spent in the City Centre. Whilst in terms of sector of expenditure 70% of expenditure is captured by city centre accommodation
- Our initial test of tourist days is that 1.1 million tourist days were spent in the city centre in 2004

Tourist Days: City & County (Thousands)	2004 (000)	Estimated Scenario: Swansea City Centre %	Estimated Scenario: Swansea City Centre No of (000)
Serviced Accommodation	671	80%	537
Non-Serviced Accommodation	2,285	0%	0
SFR	826	10%	83
Day Visitors	2,086	25%	522
TOTAL	**5,869**		**1,141**

Sector of Expenditure: City & County (excl VAT)		Estimated Scenario: Swansea City Centre	
	2004 (£ m)	%	£ m
Accommodation	24	60%	14
Food & Drink	36	65%	23
Recreation	11	40%	4
Shopping	23	65%	15
Transport	18	60%	11
Indirect Expenditure	61	45%	28
Total	**192**		**95**

- For sector of expenditure our initial test is that the city centre captured £95m.

Destination Competency

1.8 The regeneration framework is concerned solely with the City Centre. However it needs to be recognised that the whole of the City & County of Swansea combined with its hinterland of the south-west of Wales region are crucial to understanding the role of the City Centre itself.

1.9 The City Centre regeneration framework needs to consider whether Swansea's visitor economy should be developed further for its own economic sake and what are the induced effects on the brand, the investability, the quality of life and social and economic inclusion of the population. We first introduce the elements for a successful destination and second an approach to the appraisal and development of destinations. Later we present the first draft of an assessment of the competency of the current state of the visitor economy of Swansea City Centre and its assets.

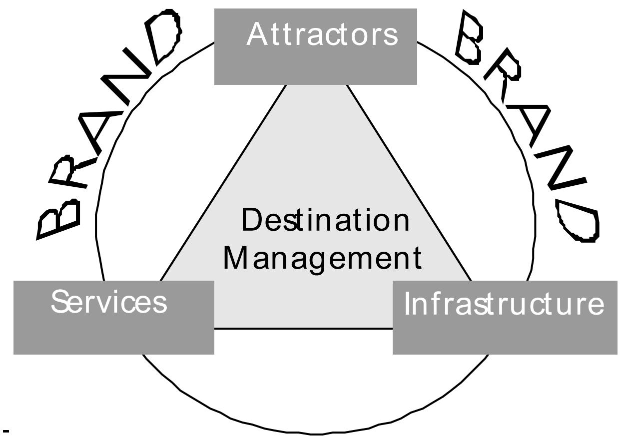
Elements of a Successful Destination

1.10 The "competency" of destinations has been analysed by Locum. Our main conclusion is that a competent destination has a balance of provision incorporating five elements:

- Attractors – to pull the market linked to consumer propositions.
- Infrastructure and support - to facilitate access, quality and the competitive operation of the destination.
- Services – to meet the needs of visitors and ensure that in-destination spending is high.
- A brand and a brand operation – that gives coherence to the offer, and that the industry network within the destination can use as the focus of its marketing plan and operations.
- Destination management – a destination based partnership organisation that provides an holistic approach to planning and operations. The organisation should support enterprises and networks to ensure a successfully competitive destination is sustained.

1.11 When all these elements are in place, new product investment has the platform it needs to succeed quickly. For example in the visitor economy it is self evident that attractions without adequate local accommodation fail to provide strong economic outcomes. Further the lack of a destination management organisation, competent infrastructure and/or destination branding and marketing operations and adequate budgets leads to under-performance of attraction and accommodation projects. An integrated approach with all these five elements in balance is essential for sustainable progress and is illustrated below. Creating a competitive destination is the essence of a destination management organisation role.

The Locum Destination Consulting Destination Dynamic © 2003



Appraisal and Development of Destinations

1.12 There is considerable opportunity to add value to product development by ensuring that destinations are "competent". "Competence" means a system fit for purpose. The Locum Destination Audit *"check-list©"* below indicates the scope of any review and subsequent intervention.

1.13 In conjunction with the "Destination Competence" test, investors must ask whether the product development investment makes a substantive difference to the "completeness of the destination" and the partnership operation of the destination. This allows investors to make more informed decisions with regard to risk and return.

1.14 The logic of this test is that such investment is both more likely to be successful if the rest of the destination is relatively competent and secondly that providing a more rounded destination, both physically and operationally, will assist other projects and investors. The development of a critical mass of rounded destination development and competent operations is therefore an important generic benefit.

Swansea Destination Audit

1.15 We reviewed Swansea City Centre against our five *Destination Competency* elements and their individual criteria. This review is based on subjective Locum opinion. It is not designed to be prescriptive, its use is purely as a tool to provide a reference point that considers the likely Swansea consumer experience in comparison to competitive locations.

1.16 We would wish to discuss this initial thinking to develop consensus and refine our analysis to highlight priority projects and what they may mean to Swansea City Centre in terms of the emerging regeneration framework.

1.17 For each of the five elements there are a range of criteria that we have assigned a score 1 to 5: 1 = poor, 2 = weak, 3 = average, 4 = good, 5 = excellent

1.18 We considered Swansea overall a weak destination. This is reflected in an average score of all five destination competency elements of 2.0 out of 5. Swansea performed best in the *attractor* element with an average score of 2.3. We considered Swansea's weakest competency element to be its *branding* with an average score of 1.6.

1.19 Below we outline our draft appraisal of Swansea City Centre as a destination.

1.20

1. ATTRACTORS	Score	Draft Comment for Discussion
1.1 Do the "attractors" of Swansea have a good **market fit to existing and desired markets ?**	1.5	▪ Lack of wet weather facilities following closure of leisure centre ▪ Limited exhibition/conference centre/showcasing facilities. Morfa stadium will improve the position considerably ▪ Generally fragmented leisure & cultural offer
1.2 Is there an adequate **portfolio of attractors ?**	3.5	▪ Reasonable portfolio of attractors e.g. NWMS, museums, local natural environment, largest covered retail market in Wales, University and Sports centre of Excellence & Morfa stadium ▪ Lack of competitive business tourism product
1.3 Do the attractors have a **sense of quality** and are **market expectations met** ?	1.5	▪ Swansea does not have a sense of quality, for example premium F&B and retail ▪ Product is probably appropriate to the existing market that has low expectations ▪ Morgans, NWMS, Morfa stadium & Salubrious are setting higher benchmarks
1.4 Is there **integration & collaboration** of operations ?	1.5	▪ Booking Systems to integrate hotels and attractions and events appear weak
1.5 Does destination **have capacity** for peak operations ?	1	▪ Big city centre celebration events difficult in very limited space/public realm ▪ Morfa Stadium and Singleton Park are distant from the city centre
1.6 Are attractors **deliverable/viable & sustainable ?**	2	▪ Difficult to develop new attractors without subsidy in a relatively small market with limited catchment
1.7 How does **access & opening** align with **seasons ?**	2.5	▪ Lack of wet weather and/or covered facilities are problems in holiday season
1.8 Is there a full **programme of events** ?	4	▪ Good, sports centre of excellence, Swansea Bay Summer Festival and Morfa Stadium.
1.9 Do the attractors align with **local history and culture ?**	3	▪ Yes i.e. Dylan Thomas Centre and NWMS but overall feeling that history and culture is not maximised. i.e. 1. Castle interpretation, 2. The port and the people and products exported to the world
1.10 Do attractors have a **consistent brand** and do they compliment the **sense of place ?**	2	▪ Weak brand; there appears to be limited consistency ▪ Attractors not physically linked into a strong sense of "iconic presence" or sense of place
Attractors Average Score: 2.3 out of 5 *We consider there is not a critical mass that does not justify a short break and overnight stay. Progress is however being made with NWMS and Morfa stadium*		

2. SERVICES	Score	**Draft Comment for Discussion**
2.1 Is there a **full range of accommodation** ?	2	▪ No major business class hotel ▪ Limited range of products i.e. low/mid market operators ▪ Branded hotels entering the market
2.2 Do services offer **quality** and are they **locally distinctive** ?	2	▪ No leisure resort product but De Vere Village will be an attractor ▪ No overall sense of quality; premium retail, restaurant, leisure offer is deficient
2.3 Are services **integrated** into **events and attractors** ?	1	▪ Lack of integration of hotels with restaurants, events and attractions ▪ Services are not legible or integrated ▪ Access to emerging cultural quarter is difficult ▪ No real-time hotel/event booking systems
2.4 Is there a modern **night time economy** ?	3	▪ Appears below average for a UK city of c. 250,000 with a large student population ▪ Limited leverage of local themes, i.e.) Welsh, sea, sports, culture, environment, education ▪ Lack of cultural critical mass
<u>Services Average Score: 2.0 out of 5</u> *Evidence of growth but problems of city legibility, integration, image and night time economy hinder growth.*		

3. INFRASTRUCTURE	Score	Draft Comment for Discussion
3.1 Is there **high quality public realm/domain** in key visitor locations ?	2	▪ No, tired unkept appearance exemplified by the vacant plot adjacent to Castle Keep and Wind Street ▪ Uninspiring public realm and limited city celebration space ▪ Lack of a branded welcome/gateway zone
3.2 Is there **integrated public transport for visitors ?**	3	▪ Bus and train stations on opposite sides of city centre ▪ Seasonal transport ▪ Harsh edges/boundaries, for example crossing Oystermouth ▪ Poor perception of local taxi operators
3.3 Is there high **quality public parking ?**	1	▪ Poor car parks, high level of messy surface parking ▪ No "women only", "premium" or "visitor" parking facilities (i.e. NWMS car park is full of shoppers) ▪ Lack of traffic enforcement
3.4 Is the city centre **visitor friendly** and **safe & clean** and legible to the visitor ?	2	▪ Welcome and orientation and service offer is difficult to find, especially at night ▪ Tourism Information Centre lacks visibility to the visitor ▪ Perception (& reality ?) that Swansea is a dangerous place at night ▪ Fabian Way approach is positive but from other northern approach the city presents and untidy front
3.5 Is the **built environment of high quality** ?	1	▪ Poor quality architecture with very limited iconic buildings or structures ▪ Bridge to NWMS, the museum itself and the Royal Institution (Swansea Museum) and Morgan Hotel can all be considered iconic
Infrastructure Average Score: 1.8 out of 5 ***Not competitive in quality, tired, not legible, not visitor friendly and no orientation visitor welcome.***		

4. BRANDING	Score	Draft Comment for Discussion
4.1 Are **city attributes** demonstrated to residents & visitors ?	1	▪ Very weak, no clear brand proposition and no coherent messages ▪ Negative perception of "Swansea" across rest of UK and possibly Ireland ▪ Are sports teams involved as ambassadors (i.e. rugby/football) Morfa stadium should assist ▪ Positive: Dylan Thomas Centre, Swansea Bay, University, Mumbles/Hinterland
4.2 Is the **external brand** consistent with realities on the ground ?	2	▪ Weak mixed messages/brand, unlikely to attract premium occupiers/visitors
4.3 Are brands **used and reinforced at attraction, services, infrastructure** ?	1	▪ No unified brand used across the city ▪ Collaboration not evident
4.4 Does the city project a **sense of place** or **distinct environment ?**	2.5	▪ Very limited, although emerging sense of place at National Waterfront Museum Swansea, marina, Dylan Thomas centre.
<u>Branding Average Score: 1.6 out of 5</u> *A major problem area; confused responsibility, integrated approach not yet producing outcomes. Under investment.*		

5. Destination Management	Score	Draft Comment for Discussion
5.1. Is there Destination Management organisation that **covers all facets of destination management** ?	2	▪ Several Swansea in private/public initiatives: 1. City Centre Partnership 2. Pilot Business Improvement District 3. Swansea Tourism. Other partnership initiatives for city image
5.2 Is there strong **private sector** involvement ?	2	▪ Large amount of retail moved out of city centre indicating reducing engagement ▪ Very limited office sector engagement – again gone out of town ▪ Positive: BID to be set up will need significant private sector engagement
5.3 Are Destination **business networks** identified as **partners**	2	▪ Limited to date – indicative of continued public sector dependency ?
5.4 Does the city offer **cluster business support and skills training** ?	2	▪ Yes but "portal" may be confused ?
5.5 Is there a **vehicle for strategic intervention**	3	▪ Yes WDA and the creation of a City Centre Partnership
5.6 Are **welcome hosts** employed are there Swansea **ambassador schemes ?**	2	▪ A BID would operate with welcome hosts/street managers ▪ Are "Swansea personalities" engaged ? (i.e. Catherine Zeta Jones, Scott Gibbs, John Toschack et al) ▪ Needs further development
5.7 How competent is the **TIC** and **destination web presence.** Is online booking possible ?	2	▪ Poor existing Tourist Information Centre. ▪ Visitswanseabay.com website readable and informative of what is on and special offers. On line booking not available directly from website but from separate hotel websites
<u>Destination Management Average Score: 2.1 out of 5</u> *Emerging progress but competitive destinations are more integrated and offer focused city destination management.*		

Market drivers of positive change in the Swansea visitor economy

1.21 Given the current situation what should be the direction of progress, and what should the regeneration framework focus on? The two most important areas of market demand development in cities are:

- the growth of the city-leisure-break, and
- business tourism

1.22 Experience elsewhere tells us that both of these markets can respond strongly and relatively quickly given a positive combination of product development, effective destination management and strong branding. We consider these two opportunities and three further market drivers below:

- Developing Swansea City Break Product
- Business Tourism
- The Residential Market
- Supply Led Demand for Attractions
- Daytime Food & Beverage Generation

Developing Swansea City-break product

1.23 City leisure breaks use soft weekend occupancy in hotels to create a packaged “consumer experience”. It is possible to envisage that developments relating to museums and cultural assets and events, the new stadium and its events and the City festival event programme can all be very effective demand drivers. Many of these assets are now in place and these types of market development initiative are within reach. However, all of them require a far higher calibre of City Centre environment and a larger critical mass of facilities and activities and very positive management to be successful.

Business tourism

1.24 This primarily focuses on weekday hotel occupancy and on the establishment of good quality business meetings, conferences and exhibition facilities. Currently assets are moderate to poor in quality. Facilities in the City Centre are not commensurate with the status of the City. Business tourism is a high value area for the visitor economy and is capable of giving business leaders and prospective investors a more positive view of the City and its economy than currently exists.

The Residential Market

1.25 Currently there appears to be a lack of an “urban living” product in city centre Swansea. The example of high density “urban living” in the core UK regional cities such as Birmingham, Manchester, Glasgow, Belfast and Cardiff is now being replicated in smaller regional cities such as Nottingham, Exeter and Ipswich. These locations provide examples of where inner city residential development has boosted city centre vibrancy, shifted market aspirations and attracted further inward investment.

1.26 The resident catchment in relation to many other UK cities is modest. This means for example that visitor forecasts of cultural, educational and family leisure attractions are usually far lower than are required for financial viability. Currently the poor calibre shopping experience results in leakage but the positive night-time and cultural offering of the City Centre does sustain a 60-90 minute catchment. There is a need to ensure that the cultural and night-time offering remains competitive in the hinterland and that methods of adding value and sustaining higher expenditure should be found within the Regeneration Framework.

Supply-led Demand for attractions

1.27 A fourth potential driver of Swansea's visitor economy is the opportunity to attract a substantial scale visitor economy investment. From time to time propositions such as a National Aquarium or National sports facility are mooted. The logic of this is that a "category buster" asset attracts high frequency and wide market catchment and in doing so brings a very strong visitor economy stimulus. These are highly risky projects and difficult to forecast. Nevertheless, the capacity to accommodate such initiatives should be considered in the City Centre Regeneration Framework.

Office & Retail Market and Daytime Food & Beverage (F&B)

1.28 Whilst the night-time economy centred around Wind Street as encouraging, the F&B sector faces difficult trading conditions during the daytime. First Wind Street is not particularly well integrated into the core retail pitch. Second and of most significance, much office employment now occurs at out of town/fringe locations. This means attracting more office occupiers into the City Centre coupled with an improved retail offer should result in a stronger F&B market and ensure the City Centre experience is more positive during the daytime.

Conclusion

1.29 We have rated Swansea overall at 2 out of 5 in our destination audit, i.e. we believe the destination offers only a "weak" destination offering to visitors.

1.30 Swansea still has moderate performance in its traditional day visit and holiday making markets. It has failed substantially in modernising its urban tourism offering. Indeed, its offering has declined with respect to wet-weather provision and the closure of the leisure centre adversely affecting the experience of holiday makers wishing to come to the City. The City Centre retail has very little leisure/speciality retailing and the urban environment is completely undistinguished. The business tourism offer is very modest.

1.31 The positive aspects are the emergence of the night-time hospitality and food and drink offering where its performance leads the south-west region. To some extent this has been motivated well by the investment in public/private investment in Wind Street. The waterfront area shows continued growth in the Marina and demonstrates growing consumer spending, but the general Marina and sailing scene could be far further developed. The cultural offering of the City has been persistently enhanced with events, the theatre, the Dylan Thomas Festival and now the National Waterfront Museum all demonstrating substantial progress. However, the sum of these positive parts does not yet add up to a strong City-break offering.

2 DESTINATION STRATEGY

Introduction

- Locum Consulting have contributed three deliverable reports[1] in support of the Roger Tym & Partners led Regeneration Strategy for Swansea City Centre
- In addition we have provided ongoing advice, thoughts and recommendations as the project has evolved
- The City and County of Swansea (CCS) need to focus on the sites and opportunities they control or can directly influence to deliver fast paced, exciting and effective regeneration
- For effective regeneration of the city centre the CCS needs to take the lead and set the standard for regeneration. This means that CCS should not be reliant on others to bring forward schemes
- Such schemes involving private sector owned land are more likely to be deliverable once the CCS has set the benchmark and begun to change the market perception of Swansea
- We support the Stevens Associates consultation paper on Swansea Tourism. We recommend that tourism should be made a cross cutting theme in emerging planning, economic development and city centre regeneration strategies
- The effective repositioning of Swansea City Centre will be supported by the development of a variety of products to capture increased demand from business and leisure tourism through a number of city break and attraction products. For example:
  - Conference/exhibition facilities, “Visitor Precincts”
  - Concentration of hotel facilities
  - Revitalised Swansea Indoor Market
  - Improved cultural and leisure offer centred around a revitalised Grand Theatre and Leisure Centre

Market Drivers of Change in Swansea City Centre

The Visitor Economy

2.1 Locum’s earlier work on Swansea Tourism highlighted two market drivers for positive change in the Swansea demand:

- Business tourism
- City Leisure break

2.2 We have reviewed the paper produced by Stevens & Associates for the Swansea Tourist Strategy *“Tourism in Swansea – A Way Forward: A Consultation Paper”*. We agree with their thinking and recommendations, in particularly we would highlight:

- Capitalising on the area’s maritime settings, access to highly valued landscapes and traditions of creativity and innovation
- Potential to become the regional tourism centre and the favoured destination for both leisure and business reasons

[1] Note: combined in this Technical Appendix into this Appendix Five

- Major investments in key transformational schemes, for example, a purpose built conference centre, further hotel development, new public spaces, physically linking the city to the sea
- The Stevens & Associates report makes important suggestions with regard to improving:

  - Communication
  - Greater collaboration and co-ordination by key stakeholders
  - Enterprise and customer service culture
  - Generating a truly organised approach to tourism, city initiatives, products and expertise that improves the visitor experience
  - Improving Swansea's competitive positioning through high quality research of its market(s), marketing and quality assurance.

2.3 Crucially tourism should be a key component of the emerging work being undertaken for Swansea. Tourism should be a cross cutting theme in the emerging:

- Unitary development plan
- Economic strategy
- City Centre Regeneration framework

2.4 These emerging projects need to be joined together a clear tourism vision articulated so as to support job creation, training, environmental improvement and the development potential of Swansea.

2.5 Locum experience elsewhere tells us that business tourism and city break markets can respond strongly and relatively quickly given a positive combination of product development, effective destination management and strong branding. We consider City Break and Attraction products below.

Business Tourism and City Break Product

2.6 The objective of this is to increase the level of business tourism and leisure short breaks visitation, increase dwell time thus capture increased income.

- Ocean Visitor Precinct on the Paxton and East Car Parks
- River Visitor Precinct around the Dylan Thomas Centre, Sail Bridge and car park
- Hotel Cluster associated with Visitor Precincts

2.7 The increased trend for leisure breaks, Swansea's superb hinterland and Bay coupled with climate change, raises the potential for Swansea to become an attractive visitor economy destination. We can envisage an attractive, visitor economy "strip" that extends from the proposed Ocean Visitor Precinct.

2.8 The long run vision should be for Swansea to be seen in the same bracket as some of the best Ocean front cities in the world. For example: Miami (South Beach), Sydney (Bondi/Manley), Barcelona, Brighton, Capetown (Clifftown), Biarittz and Deaville/Trouville.

Attraction Product

2.9 Attraction products that we consider can contribute to Swansea repositioning include:

- Swansea Indoor Market – This should be given a major investment to reposition Swansea as the gastronomic heart and "slow food" capital of Wales. It should reflect premium produce and provide an exciting place that locals and visitors alike enjoy
- Plas Grand Theatre – helping create the cultural quarter CCS has long aspired for and to make the visit to the theatre more special than it currently is

- Leisure Centre potentially with an adjacent indoor all weather small scale arena concept

City Management

2.10 Good progress is being made on the Swansea Business Improvement District this should be vigorously supported over the crucial next 5 months in the lead up to the vote.

2.11 Clear thinking to bring all elements of the valuable work being undertaken in Swansea – City Centre Regeneration Framework, Tourism Study, Economic Strategy and emerging Unitary Development Plan – into a co-ordinated business plan. This should ensure the five core elements of destination competency are in place – Attractors, Services, Infrastructure, Branding and Management.

2.12 A Swansea Ocean Visitor Precinct may bring the location of CC Swansea County Hall to the fore. County Hall is a major barrier on the city centre fully connecting with its fantastic bay & beach. This hinders the vision of Swansea becoming a waterfront city. We thefore consider there is one significant area where CCS could make a fundamental difference in delivering their vision. This is the location of CCS functions at County Hall. We understand that this is a very sensitive topic but consider as a professional and trusted advisor to CCS we would be amiss at not raising this issue as part of Locum Consulting's input. Potentially we consider relocation from County Hall into the core city centre. A new city centre facility could mean:

- Estimated 2,000 people working in the core city centre that will contribute to increased retail and overall city-centre vitality
- Increased retailer and retail developer appetite for the city centre
- Land values in the city could come under upward pressure, improving development viability for a range of products
- Other office users may be encouraged to move into the city centre
- More effective management and communication between CCS and the local population

2.13 The County Hall site is arguably the best site in Swansea something the market may pay premium values for that helps further in the delivery of CCS vision for Swansea to be a modern successful waterfront city.

Summary of Locum Deliverables

Swansea Visitor Economy - Baseline Analysis, 20th May 2005

2.14 Swansea has a strong competitive context that is now regional, national and international.

- The south-west Wales region is a popular activity/environment destination
- Despite being the regional city, Swansea is not viewed as a destination city – its portfolio of facilities is weak. This means Swansea is not regarded as a "must see" destination for visitors to the region
- Swansea's relatively small market scale indicates difficulties with funding large scale sustainable attractions are likely
- A preliminary review of "destination competency" and competitiveness of Swansea City Centre indicates Swansea's performance is weak

2.15 Key features of Swansea's destination competency are:

- Moderate power of city centre attractors
- Linkages between destination elements are poor
- Poor city legibility and not an integrated destination
- Swansea is punching below its weight given its size and student population

2.16 Five drivers of positive market development have been identified:

- Focused development of the city break product
- Product to attract increased business tourism is needed
- Development of residential urban living product
- Supply led demand for attractors
- Integration of retail and office uses to strengthen the daytime food & beverage sector in the city centre

2.17 Swansea has an expanding portfolio of facilities however the sum of these parts does not yet result in a strong city product.

2.18 This general conclusions is consistent with the findings of the Draft Tourism Strategy consultation paper prepared by Stevens Associates in October 2005.

Swansea Visitor Economy – Project Initiatives, 27th June 2005

2.19 Swansea aspires to become a successful European Waterfront city. Currently it falls short of this vision. We consider Swansea needs to raise its competitive position to the visitor economy to deliver this aspiration This means:

- Clarity on marketing and overall brand
- Property: provide a full range of "products" in its portfolio of amenities it offers to the market
- Business fundamentals: training, education, networks and business support services

There are three broad areas we consider for action to make Swansea a successful destination:

- City Break Product
- Attractions
- Office led mixed-use development

2.20 Specific projects and initiatives we recommend the consultant team focus on at the next stage of the regeneration framework strategy are:

- Generic
  - Marketing of the city incorporating urban design, permeability and signage
  - Land ownership considerations and opportunities for participation amongst existing land holders/institutions and those currently not in Swansea

- Specific Projects
  - Indoor market repositioning and surrounding opportunities
  - Product development of the hotel circle, leisure centre & modern library concepts
  - Clarification of St David's Centre redevelopment options
  - Consideration of a major new piece of city – office led mixed-use development

2.21 Crucial to success of such projects is the repositioning of Swansea city centre to attract new range of users compared to the current level. This means a holistic approach encompassing marketing, property and business fundamentals is required.

Swansea Visitor Economy – Transformational Projects, 19th August 2005

2.22 Two projects were outlined that would contribute to repositioning and delivery of the CCS vision and align with the recommendations from the emerging Tourism Strategy.

- Swansea Indoor Market
- Swansea Ocean Visitor Precinct

2.23 We also consider another Visitor Precinct should emerge. A Swansea River Visitor Precinct located around the Dylan Thomas Centre, the Sail Bridge, SA1 and the River Tawe would seek to ensure visitor footfall "crosses the divide" of Oystermouth Road at the eastern edge of the city centre. This is vital if the CCS vision of a waterfront city is to be achieved. Furthermore Locum have considered a cultural component of Swansea City Centre repositioning, this is summarised below.

Cultural Strategy

2.24 The current Cultural Strategy is now at the end of the plan period – it ends in 2005. The Cultural Strategy supports the need for a redevelopment of the Leisure Centre. It also supports the need to continue investment in cultural programming and to link the National Waterfront Museum to the City Centre and its visitor economy and educational functions. The Head of Culture Sport and Tourism acknowledges that there is a need to revisit Cultural Strategy during the next year to create a plan for 2006 – 2010.

2.25 The idea that the existing Grand Theatre investment should be enhanced by linked private sector development does not seem inconsistent with the future objectives of a Cultural Strategy, the management of the Grand Theatre and greater retail and leisure offer in the city centre. Indeed if there can be increased levels of visitor convenience and comfort and better ancillary facilities then the Grand Theatre operation can be more competitive as a venue and experience higher levels of visitor spending.

The Plas Grand Theatre Project

2.26 The Grand Theatre management is concerned about the loss of car parking in close proximity to the Grand Theatre. It should however be possible to include local car parking provision in the scope of the Plas Grand Theatre development since there is proven demand, the development will induce additional demand, and there appears to be a strong opportunity for multi-level development. The approach taken in the Salubrious Place development indicates that there can be confidence in this approach.

2.27 The Plas Grand theatre Project presents the opportunity to enhance and broaden the night time economy offer of Swansea and reinforce the role of the city in the wider economy.

Outcomes

2.28 Assuming successful development of these projects, this leads us to expect that:

- The areas of greatest value potential within the city could be redefined, and;
- The performance and role of Swansea as a destination (retail, business, visitor, residential) to change.

2.29 The night time economy in Swansea is likely to shift towards Wind Street, the River Tawe and Oystermouth Road. The Kingsway is currently a major component of the nigh time economy, this means potential change gives rise to three possible scenarios:

- Kingsway ceases to be big leisure destination - short/medium term;
- Kingsway is managed down as a leisure destination to a new focus - medium/long term
- 1Kingsway deregulated, other land uses encouraged - short/medium term. Potentially CCS can influence this through its site ownership in the area.

2.30 Another outcome of the concentration of night-time leisure around Wind Street is that city centre management is likely to be more effective.

Locum Consultation

2.31 During the course of our work we have had discussions with organisations and individuals that include:

- Paul Sheppard and Trevor Ellard, Luminar Leisure plc owners of Time & Envy, Jumping Jacks and Orange House in Swansea
- Andrew Feilden, London & Devonshire Trust. Owner and operator of the Red Dragon Hotel, Swansea.
- Ben Lucas, University of Swansea Students Union.
- Rhiannon Kingsley, Swansea City Centre Partnership
- Lisa Wells, Swansea city Centre Partnership, Business Improvement District
- John Llewellyn, Swansea Indoor Market.
- Jones Lang LaSalle Hotels.
- Tony Stevens, Independent Hotel Architect

ANNEX ONE

Visitor Economy: Introduction

Market Definitions and Segmentation

Statistical information for the purposes of this study has been obtained primarily from two sources: research information available from the Wales Tourist Board (WTB), and tourism activity studies done for the City and County of Swansea.

Wales Tourist Board Information

The WTB for information on overseas visits is taken from the International Passenger Survey (IPS). The source for statistical information on domestic tourists (UK citizens) is gleaned from the United Kingdom Tourism Survey (UKTS). Both the OPS and the UKTS define a 'tourist trip' as a stay of one or more nights away from home for holidays, staying with friends or relatives (SFR), business/conference trips and other purposes except for boarding education or semi-employment.

City and County of Swansea Information

The information from the City and County Council is in the form of annual STEAM studies. STEAM, an acronym for Scarborough Tourism Economic Activity Monitor is a means by which tourism activity can be statistically monitored. This model measures direct and indirect tourism expenditure by examining the following sectors: accommodation, food and drink, recreation, shopping and transport.
The steam definition of 'tourist number' differs significantly from the definition employed by the UKTS and IPS as it includes those spending time away from home and also 'day visitors'.
Day visitors can present special problems as not all day visitors to Swansea will be tourists. Many will be those who live nearby and come to the city for shopping, or who combine shopping with a leisure activity. This, however, is not problematic when considering the overall market for the context of this study.

Tourists and Visitors

Given the definitions outlined above, for the purposes of this study 'tourists' will refer to those staying away from home for more than one night, while 'visitors' will refer to both tourists and day trippers, making 'visitor numbers' and the number of 'visits' substantially larger.
The figures for domestic and overseas tourism are small when compared to the importance of the day catchment market—the primary and sustaining market for Swansea and its attractions.
The study has been divided into the following sections for detailed analysis:

- Tourism in Wales (domestic and overseas)
- Tourism in South West Wales Economic Region (the unitary authorities of Pembrokeshire, Carmarthenshire, Swansea and Neath Port Talbot)
- Visitors to Swansea (day visitor, residential and tourist markets)

The third of these sections provides the main market for retail and leisure attractions in Swansea, and therefore should be foremost in mind when evaluating the data presented in this study.

UK and Wales Tourism Trends

UK tourism performance was on the increase through the 1990s, however the foot and mouth and SARS outbreaks and the problems of international terrorism since 2001 have resulted in an unstable market. Since the nature of these problems is ongoing forecasts for future growth are, at best tenuous.

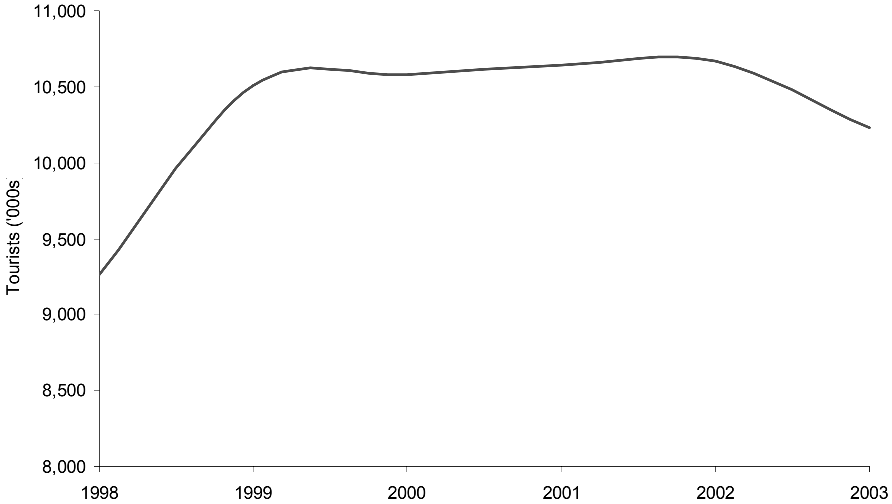
However, what can be consolidated are a number of key demographic and social trends that may impact on future demand for UK and Welsh tourism. A selection of relevant factors are outlined below:

- The UK population is ageing. Key changes that will take place over the next five years include a decrease in the number of individuals between 25-34, a strong increase in the 35-44 age bracket, and a rapid increase in the number of those 55 and older.
- Patterns of work are changing leading to a rise in working hours and a reduction in leisure time. Thus, consumers will increasingly seek 'value for time' in addition to 'value for money', and may take shorter but more frequent breaks.
- Personal Disposable Income (PDI) is increasing, providing further opportunities for tourism. However consumers are becoming more discerning, as they are faced with an increasing range of leisure experiences. Growing consumer confidence and awareness is likely to reduce loyalty and increase cross-sector competition.
- Strong competition is arising from home-based leisure activities such as digital television and online gaming. Indeed, the average British worker now spends more time watching television than actually working[2]. In addition, experiences from games consoles and web 'surfing' to interactive television and DVD players will soon begin to compete more aggressively for people's discretionary leisure time. Critically, the markets most affected by these developments are younger, middle class adults, placing a great deal of importance on attracting a significant share of older visitors and 'empty nesters'.
- Shopping is the second most popular British pastime. Bluewater Park Shopping Centre in Kent and the MetroCentre in Newcastle, for example, host more visits per annum than total visitation to all national museums. Reasons for the popularity of new shopping malls include: a sense of security within closely monitored environments, a variety of retail, eating and entertainment 'experiences', the presence of music, theatre and exhibitions and the provision of general interest activities for the whole family. City centres must complete with this, but also can take important lessons from this leisure/retail concept. For example, creating an integrated leisure destination that appeals to different audiences, age groups, interests and backgrounds in an attractive and secure environment.
- Despite environmental concerns 'car culture' is likely to remain. This places considerable pressure on all destinations to provide adequate parking facilities. It should be noted, however, that discretionary or 'non-essential' motoring has become less of a pleasurable experience for people (40 per cent of respondents in a recent survey claimed to *enjoy* driving compared to 80 per cent in 1991)[3]. Given a reliable, convenient and pleasurable alternative, more people may be willing to leave their cars at home when making leisure-motivated day visits.
- A relatively small but important sector, the coach holiday market has shown some modest growth over the 1990's. The current domestic market is dominated by the over-55s, and with the projected increase in the 55+ market over the next few decades, there is optimism for future market growth. In addition, the market is still dominated by the C2,D,E socio-economic categories.
- The rise of the 'city break' phenomenon has played an important part in driving down the length of visitor stays in British and European Cities. In general, city breaks, and holidays with a more cultural component are more popular with the AB Acorn categories (44 per cent) and 'pre-family' consumers. A number of

[2] *1999 Survey of Household Expenditure*
[3] *Graham Senior,* Insights, July 2000.

cities (including Cardiff) have begun to brand and market themselves as short break visitor destinations for domestic tourists. Cardiff has achieved moderate success in this regard, but not Swansea (see Exhibit 1).[4] An element of Cardiff's growth is likely to be attributable to the recent football finals and payoffs held at Millennium Stadium during the construction of the new Wembley Stadium. This is a highly competitive market place where city destination comparators are important.

Exhibit 1: Tourists to Cardiff, 1998-2003



Source: STEAM, Cardiff Marketing and Tourism

- Devolution and Welsh Assembly Government is impacting on the future promotion and development of tourism in Wales. How the Wales Tourist Board structures and markets the overall offer will strongly influence the development of tourism in cities like Swansea.[5]
- The budget air market has opened up a large number of continental destinations that UK cites are now directly competing against. UK consumers are increasingly likely to take their short breaks outside of the UK, rather than in it. At the same time Wales' single international airport, Cardiff International, does not have a particularly extensive incoming route network, constraining the international short break market. However, the airport has recently attracted a discount transatlantic carrier, whose success will prove an interesting barometer.
- Countryside breaks are becoming increasingly popular. Almost 65 per cent of countryside holidaymakers are in the A,B,C1 social categories with high levels of disposable income. Seasonality is less marked than for seaside holidays, and trips tend to be much shorter. The impact of FMD curbed this trend in the short term, however with Government initiatives and extensive advertising campaigns, rural tourism is likely to resume its strong growth. With such a wide stretch of countryside in Swansea's immediate environs, it would be sensible to promote the Museum there as an enjoyable day visit on a rainy day or a cultural 'day out' in the city.

[4] Mintel Report, 'Short Breaks in the UK
[5] Achieving Our Potential: A Tourism Strategy for Wales. WTB.

- The domestic long (4+ nights) holiday market peaked in the 1970s and has since gradually declined. Demographic and lifestyle trends suggest that this will continue, as more individuals holiday overseas. Sophisticated marketing segmentation, targeting groups such as affluent empty nesters and retirees for short breaks is mentioned as a priority in the tourism strategy for Wales.[6]

Tourism in Wales

Wales received a total of 12.5 million tourists in 2003 (down from 14.38m in 2000), staying 52 million nights and spending just over £2 billion (Exhibit 2). Similar to previous years, tourism is dominated by UK residents (93 per cent). The most prominent UK groups are Wales itself, North West Merseyside and the West Midlands (18 per cent, 21 per cent and 15 per cent respectively)7.
Tourism is highly 'peaked', with over two thirds of tourist visits occurring between April and September. This can be partly explained by the prominence of holiday tourist visits to coastal destinations. The seaside accounts for 44% of domestic holidays in Wales.

Exhibit 2: Tourism in Wales, 2003

	Visits		*Nights*		*Expenditure*	
	m	*%*	*m*	*%*	*m*	*%*
UK Residents	11.6	92.9	45.7	88.6	1,766	86.8
Overseas Residents	0.89	7.1	5.9	11.4	269	13.2
Total	12.49	100	51.6	100	2,035	100

Source: Wales Tourist Board, 2003.

Holidays are the most common single purpose for tourism in Wales (74%). Of these trips, 85 per cent used the car as the primary means of conveyance.
Commercial accommodation was used on 56 per cent of trips to Wales accounting for 51per cent of tourism spending. Some 94 per cent of holidays in Wales involve some specific leisure activity or interest.

Domestic Visitors

The most important market for Wales is the domestic UK market of c.12 million tourist visits per annum, staying for nearly 46 million nights and spending £1.8bn. Of domestic tourists, 79 per cent are from England, while 18 per cent are Welsh. Nearly 38 per cent visit during the peak period of July to September.
Holiday tourist trips account for 74 per cent of visits, many of which are motivated by the seaside (44%) and the countryside and villages (28%). It is worthwhile to note that only 10 per cent are motivated to visit by a large city or town. This is reflected by the type of activity that tourists undertake (Exhibit 3).[8]

[6] Achieving Our Potential: A Tourism Strategy for Wales. WTB.
[7] Wales Tourist Board.
[8] Wales Tourist Board, 2003.

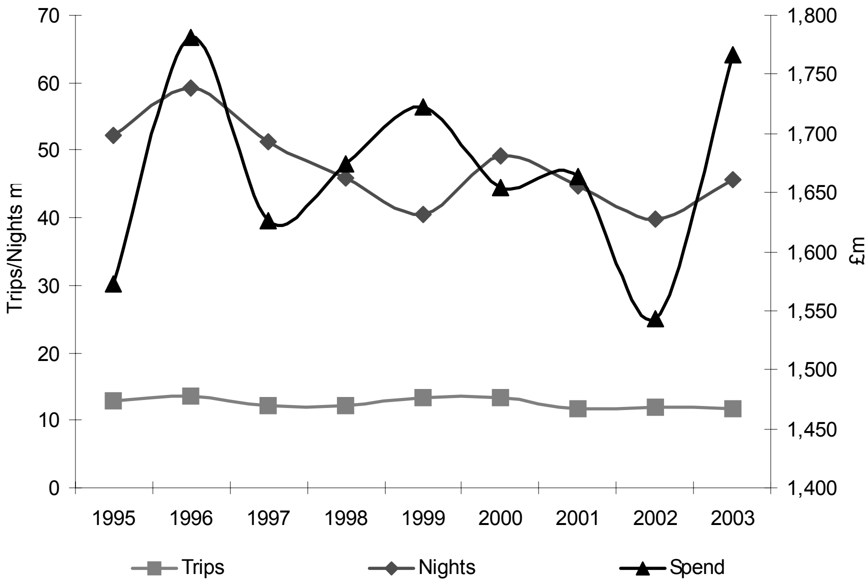
Exhibit 3: Activities on Holiday Tourist Trips

	%
Participant Activities	
Walking	74
Swimming	29
Field study/nature study/bird or wildlife watching	13
Fishing	5
Sailing/yachting/boating	5
Cycling	8
Mountaineering/rock climbing/abseiling/caving/pot holing	7
Golf	3
Attractions/Entertainment	
Visiting castles, monuments, churches, etc	39
Visiting museums, art galleries, heritage centres etc	21
Visiting a theme park or activity park	12
Watching performing arts/cinema	12
Any Activity	**94**

Source: Wales Tourist Board, 2003.

Activities undertaken by domestic holiday tourists to Wales are dominated by outdoor leisure activities such as hiking, rambling and swimming. Only 7 per cent of tourists claimed to visit a museum or gallery during their stay, activities usually associated with a city visit.
Approximately 32 per cent of people on holiday stay with a friend or relative for at least part of the visit. A further 20 per cent stay at hotels, motels or guesthouses, and the remainder camping or caravaning. According to the UKTS social profile 33 per cent of visitors belong to AB, while the other groups are as follows: C1 at 28 per cent, C2 at 20 per cent and DE at 19 per cent.

Exhibit 4: Trends in domestic tourist visits to Wales



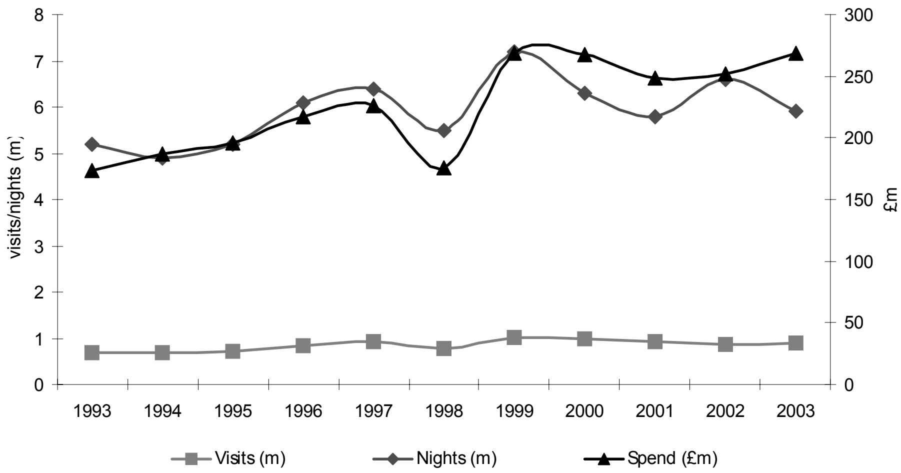
Source: Star UK.

Wales does face potential future problems from its traditional reliance on the long stay, domestic holidaymaker due to the fact that this market is in decline (Exhibit 4). People increasingly have less leisure time due to longer working hours, and are therefore tending to take shorter, more frequent breaks. Furthermore, they are increasingly likely to take breaks out of the UK, attracted by budget airfares and the strength of the pound. Improving the leisure/cultural and shopping product of Swansea would help to attract the growing short break market.

Overseas Visitors

Nearly 0.9 million overseas tourists spent 5.9 million nights and £269m in 2003 (Exhibit 5). While much smaller than the domestic market, overseas tourists are still a valuable contributor to the economy, spending on average more than their domestic counterparts.

Exhibit 5: Trends in overseas tourist visits to Wales



Source: Wales Tourist Board, 2003.

Visiting, friends and relatives is the largest single purpose of visiting the country, representing 37 per cent of all overseas tourist visitors. This is followed by holidaying at 34%. Business trips (esp. to Cardiff) also generated significant overseas business, accounting for approximately 21% of visits in 2003.
Tourists are most likely to originate from the Republic of Ireland, which accounts for 20 per cent. This is followed by the US and Germany (20% and 14% respectively). As mentioned above, visitation is especially peaked in this segment, with over a third of total visits occurring between July and September.

Conclusions

For both the overseas and domestic market the number of tourists to Wales has remained relatively stable. The large fluctuations in domestic toruist spending are likely more reflective of problematic data collection that an extremely volatile market, especially when considered in relation to the other relatively stable data.
In line with the market trends outlined in section 0 the number of nights stayed by UK domestic tourists has fallen. Many of these tourists are no longer taking long UK domestic holidays, but long haul trips and European short breaks instead. The number of overseas nights and spend, however, has overall increased.

When examining the importance of activities, countryside activities rate the highest, while visits to attractions rate significantly lower. This reflects an image that many consumers have of Wales as excellent activity destination, but not as a city short break destination or a heritage/culture destination. This is a major challenge for Swansea city centre. Swansea's hinterland and bay are the most important motivators. When visitors are in the South West region, the city centre provides a change of scene and an important wet weather destination. City Centre demand is also influenced by VFR/SFR behaviour.

Tourism in South West Wales

Domestic and Overseas

Wales is divided into four economic regions. The South West Wales Economic Region includes the unitary authorities of Pembrokeshire, Carmarthenshire, Swansea and Neath Port Talbot.

Exhibit 6. Distribution of tourism in Wales, 2003

Trips, (Millions)	*Domestics*	*Overseas*	*Total*
North Wales	4.0	0.240	4.24
Mid Wales	2.0	0.090	2.09
South East Wales	3.0	0.420	3.42
South West Wales	2.4	0.190	2.59
Wales Unspecified	*	0.030	0.03
Total Wales	11.6	0.970	12.57

Source: Wales Tourist Board, 2003.

In 2003, there were 2.4 million tourism trips by UK residents to South West Wales, totalling 11.6 million nights with a spend of £386 million. Tourists from overseas took 188,000 trips, staying 1.1 million nights and spending £47m.

Exhibit 7: Tourism in South West Wales, 2003

	Visits		*Nights*		*Expenditure*	
	m	*%*	*m*	*%*	*m*	*%*
UK Residents	2.4	92.7	11.6	91.3	386	89.1
Overseas Residents	0.2	7.3	1.1	8.7	47	10.9
Total	2.6	100	12.7	100	433	100

Source: Wales Tourist Board, 2003.

Holiday tourism by UK residents is at a significantly higher level than Wales as a whole, accounting for 86 per cent of all domestic tourism spend in the area. Within the UK market, 64 per cent of all tourism trips were taken by English residents, with the West Midlands (14%) and the North West/Merseyside (11%) the major regions of origin. Residents of Wales accounted for over one third (35%) of all tourists to South West Wales.

Swansea's location is reflected by the larger number of Irish visitors (22%), reflecting the ferry link from Cork. Within the overseas market, a further 15 per cent from Germany and 8 per cent from the Netherlands. Numbers of American tourists are significantly lower.

28 per cent of UK tourism trips to South West Wales involved SFR, similar to the Wales overall proportion of 32 per cent. Just under a quarter of all tourism trips

were spent at serviced accommodation, accounting for just over a quarter of all tourism expenditure.

Exhibit 8: Activities undertaken by tourists to South West Wales compared to Wales

	Wales	*South West Wales*
	%	
Participant Activities		
Walking	74	80
Swimming	29	40
Field study/nature study/bird or wildlife watching	13	16
Fishing	5	7
Sailing/yachting/boating	5	9
Cycling	8	15
Mountaineering/rock climbing/abseiling/caving/pot holing	7	no data
Golf	3	3
Attractions/Entertainment		
Shopping	no data	70
Visiting castles, monuments, churches, etc	39	46
Visiting museums, art galleries, heritage centres etc	21	27
Visiting a theme park or activity park	12	20
Watching performing arts/cinema	12	9
Any Activity	**94**	**97**

Source: Wales Tourist Board, 2003.

A comparison of the activities undertaken by holiday tourists (Exhibit 8) illustrates that the South West is a more popular destination for outdoor activities, than the overall averages for the country.

Conclusions

The higher number of UK tourists, and the comparatively lower number of overseas tourists to South West Wales points towards a number of conclusions.
Foremost, the region is lacking in significant atractors, such as a 'destination city', and the factors that make such a destination–the combination of a critical mass and heritage and leisure attractions, large scale event programmes, a strong retail offer and an iconic presence and sense of place.
Heritage attractions with a strong reputation tend to draw both international and domestic visitors. The lack of a city with a strong cultural or historical reputation (e.g. Oxford), or a strong historical link (e.g. Stratford), as well as its geographical location (i.e. peripheral, rather than en route) means the Swansea is not one of the 'must see' stops. It is trying to establish a strong secondary city destination role.
This is counterbalanced by the fact that this area of Wales is a more popular activity destination, likely reflecting the popularity of the Pembrokeshire Coast and still a recipient of substantial numbers of holiday maker trips.

Visitors in Swansea

Volume and Value of Visitors

As noted in 0, this section includes tourists and those taking day trips into Swansea under the heading of 'visitors'. The numbers are quite high and should be treated with caution. At the same time the market these numbers represent is of greater significance then the numbers collected on domestic and overseas tourists in Wales and the South West because it is this population that is Swansea's sustainable catchment.

Data is available in the form of Scarborough Tourism Economic Activity Monitoring Reports from 2001 to 2004.9 From the 2004 figures Locum has made a preliminary estimated of the percentage value of tourism that belongs to Swansea city centre, as compared to the whole of the Swansea Unitary Area, and is summarised in **Error! Reference source not found.**.

Exhibit 9: Swansea City & County against initial City Centre estimates

Tourist Days: City & County		*Estimated Scenario: Swansea City Centre*	
(Thousands)	*2004 (000)*	*%*	*No of (000)*
Serviced Accommodation	671	80%	537
Non-Serviced Accommodation	2,285	0%	0
SFR	826	10%	83
Day Visitors	2,086	25%	522
TOTAL	**5,869**		**1,141**

Tourist Numbers: City & County		*Estimated Scenario: Swansea City Centre*	
(Thousands)	*2004 (000)*	*%*	*No of*
Serviced Accommodation	410	80%	328
Non-Serviced Accommodation	344	0%	0
SFR	347	10%	35
Day Visitors	2,086	25%	522
TOTAL	**3,187**		**885**

[9] The data for Swansea includes the whole of CCS, which comprises the Gower peninsula and the conurbation ninth of the city along the M4.

Revenue by Category of Visitor: City & County		*Estimated Scenario: Swansea City Centre*	
(£'s millions)	*2004 (£m)*	*%*	*£ m*
Serviced Accommodation	49.1	80%	39
Non-Serviced Accommodation	63.6	0%	0
SFR	27.8	10%	3
Day Visitors	51.5	25%	13
TOTAL	**192.0**		**55**

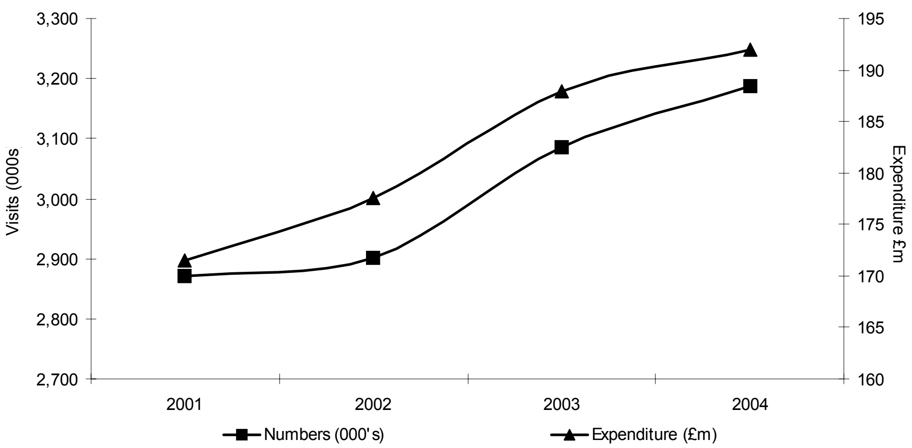
Sector of Expenditure: City & County (excl VAT)		*Estimated Scenario: Swansea City Centre*	
(£'s millions)	*2004 (£ m)*	*%*	*£ m*
Accommodation	24	60%	14
Food & Drink	36	65%	23
Recreation	11	40%	4
Shopping	23	65%	15
Transport	18	60%	11
Indirect Expenditure	61	45%	28
Total	**192**		**95**

Sectors in which Direct Employment is supported: City & County		*Estimated Scenario: Swansea City Centre*	
(FTE's)	*2004 (FTEs)*	*%*	*No of*
Accommodation	824	60%	494
Food & Drink	957	65%	622
Recreation	362	40%	145
Shopping	550	65%	357
Transport	216	60%	130
TOTAL	**2,908**		**1,748**

Source: STEAM, Tourism & Marketing Swansea, 2005. City Centre preliminary estimate interpreted by Locum Destination Consulting.

The total number of visitors has risen in the past four years from around 2.9m in 2001 to 3.1m in 2004.

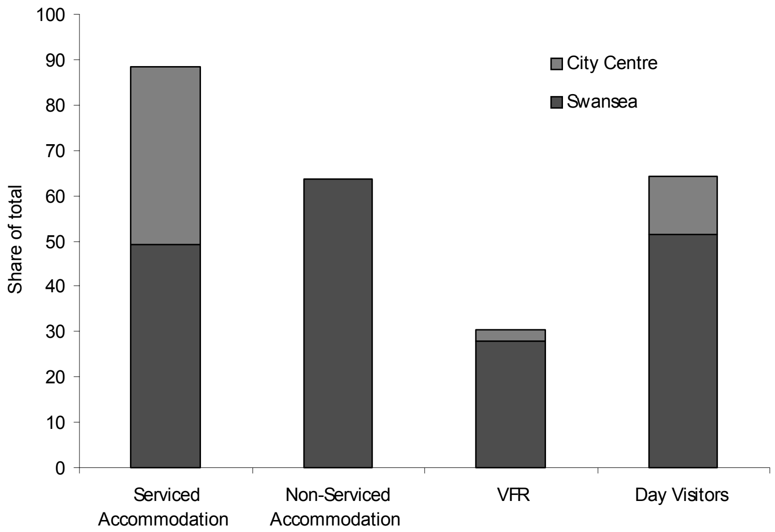
Exhibit 10: Swansea visitor numbers and expenditure



Source: STEAM, Tourism & Marketing Swansea, 2005.

In 2004 just over 3 million people visited Swansea, with just under an estimated 0.9 m of these making their visit to the city centre. Despite this, an estimated 80 per cent[10] of serviced accommodation days were spent in the city centre, illustrating that it has the greatest concentration of this provision on offer. In opposition to this, Locum estimates[11] suggest that virtually none of the over three hundred thousand non-serviced accommodation days were spent in the city centre. This is partly to be expected as this segment is largely comprised of B&Bs, small guest houses caravans and camping, uncommon in city centres.

Exhibit 11: Estimates of city centre share of revenue from tourists – initial estimate



Source: STEAM, Tourism & Marketing Swansea, 2005. Interpreted by Locum Destination Consulting.

When the city centre's share of this expenditure is estimated (Exhibit 12) it attracts about 60 per cent of all accommodation spend, a reflection of the higher cost and higher demand for serviced accommodation located in the centre. It is expected that a reasonably high amount of spend is made in county B&Bs, holiday parks and guest houses outside of the city centre. It is also the place where people spend the most money on food and drink (65%), however a significant amount of spend is retained in county pubs and restaurants. The majority of shopping spend is estimated to remain in the city (65%), however it is expected that there is significant leakage to out of town retail parks.
Most recreational spend occurs on regional outdoor activities in the wider area. Indirect expenditure largely occurs outside of the city centre, as companies that service the centre are likely to be located outside of it.

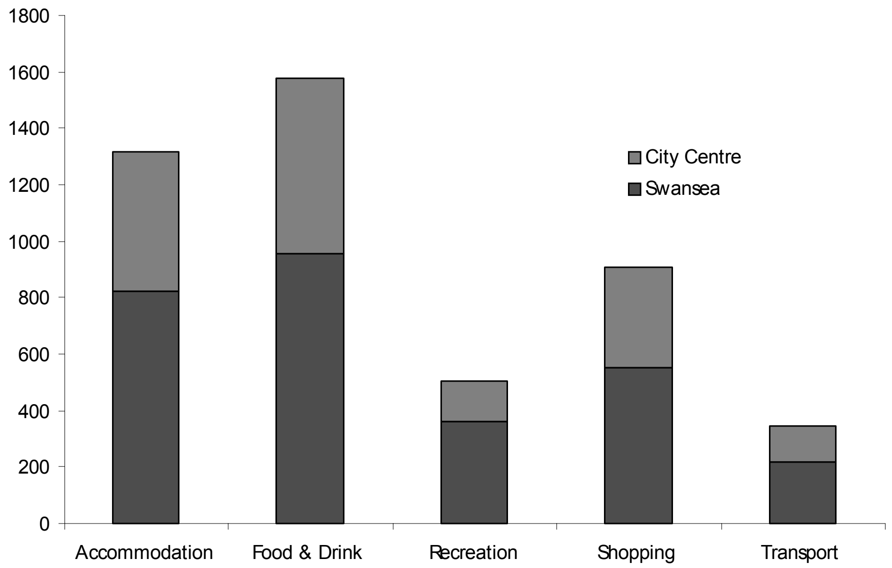
[10] Locum preliminary estimate, May 2005.
[11] Locum preliminary estimate, May 2005.

Exhibit 12: City centre share of sector expenditure – initial expenditure

Source: STEAM, Tourism & Marketing Swansea, 2005. Interpreted by Locum Destination Consulting. Note: Locum estimates were not made for VAT.

The STEAM study estimates that 2,908 direct FTE jobs result from tourism in Swansea (Exhibit 13). It is estimated that 62 per cent of these jobs are located in the city centre, the largest single groups being in food and drink and shopping, followed by transport and accommodation.

Exhibit 13: Sectors where tourism supports employment – Initial estimate



Source: STEAM, Tourism & Marketing Swansea, 2005. Interpreted by Locum Destination Consulting.

Conclusions

While the South West is generally a popular tourist region, Swansea itself faces heavy competition from Cardiff and other destinations such as Carmarthen and Llanelli, as well as from Pembrokeshire, a popular seaside activity destination. Swansea has exhibited steady but moderate growth over the past four years. These numbers are in line with the overall visitor numbers for Wales, and better than the growth seen in the STEAM studies for the Cardiff visitor economy (see Exhibit 1). Cardiff's visitor economy is now four times larger than that of Swansea.
The city centre estimates also show that it lacks significant attractors to draw people into it. Visitors go there for reason of need (hotels and their restaurants) not because of want.

Day Visitor Market

The City and County of Swansea is 378 square kilometres in size and has a population of some 230,300 people. Around, 1.5 million people live within a one hour drive of the city. Most people in the county live in the urban area of Swansea, and overall, in terms of its population, Swansea is the third largest County in Wales. Those aged 17 years or younger make up 22 per cent of the population, while 18 per cent are over the age of 65 years. The conurbation around the city includes Gorseinon, Gowerton, Pontardulais and Clydach, which are situated on the environs of the city.

Exhibit 14. Drivetime catchment map, Swansea City Centre

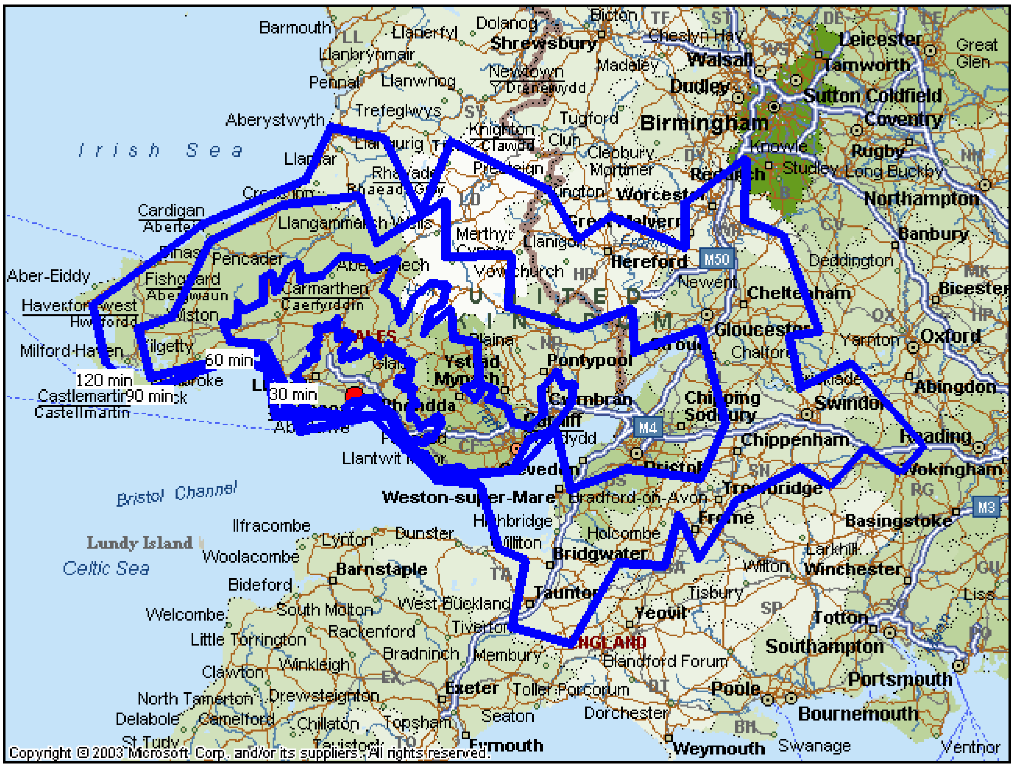
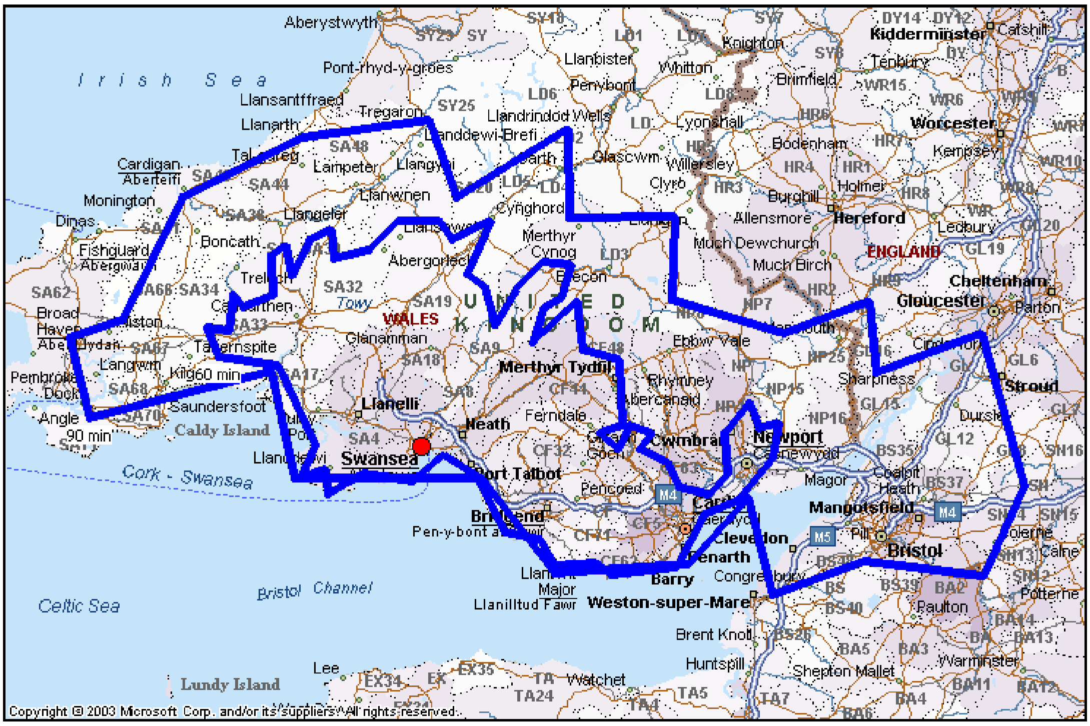


Exhibit 15. Resident Drivetime Catchment Population Summary

Drivetime	*Resident Catchment Population*	*Sum of Catchments*
00-30 Minutes	452,523	452,523
30-60 Minutes	1,071,644	1,524,167
60-90 Minutes	1,454,828	2,978,995
90-120 Minutes	1,727,361	4,706,356
Total	4,706,356	-

In reality, the most important part of the day visitor market is the 60 to 90 minute catchment areas illustrated in Exhibit 16. There are few destinations with sufficient ‘pulling power’ to draw day visitors from beyond this drive time. This isochrome includes the competitive city destinations of Cardiff, Newport, Llanelli, Carmarthen, and Bristol.

Exhibit 16. Swansea City Centre 60-90 Minute Catchment Only



Visitor Attractions Viability in Swansea

Demographic Analysis of Day Visitor Market

A detailed demographic drive time analysis was previously prepared by CACI Ltd, which provides information on the size and profile of the resident catchment within the three drive time isochromes identified (30 minutes’, 30 to 60 minutes’ and 60 to 120 minutes’ drive from Swansea).

Roughly 500,000 people live within a 30 minutes’ drive time of the Swansea City Centre attractions; c.1.5 million people live in the 30-60 minutes’ catchment; a further 2.2 million live within 60 to 120 minutes’ drive time.

The analysis uses the ACORN geo-demographic classification, which is based on a hierarchy of consumer categories and subcategories. The ACORN classification has six high-level categories of which categories A, B and C contain the consumers with the greatest disposable income and, typically, those with the greatest interest in heritage and culture. Categories D, E and F contain consumers with lower levels of disposable income, but these can be regular users of some forms of commercial leisure, visitor attractions and sports facilities[12].

The 60 minutes' catchment is not particularly wealthy with a lower than average proportion of residents within the 'Thriving', 'Expanding' and 'Rising' ACORN categories and higher than average proportions of residents within 'Aspiring' ACORN categories. Nevertheless, approximately 24 per cent of the 60 minutes' catchment regularly visit museums and galleries, which is in line with the UK market.

Market Forecasts

The market (including visitors and residents) is relatively modest. The forecast for the new National Waterfront Museum shows around 247,000 free admissions per annum as a stable position. The market analysis for the proposed Space Science Centre paid admission attraction showed a potential of 180,000 visitors per annum in a stabilised year. Revenue subsidies in excess of £0.5m per annum result from these levels of visitation. Further information is contained in the Technical Notes overleaf.

Technical Notes: Based on National Museums & Galleries of Wales (NMGW) Visitor Forecasts

Attractions in Swansea

There are a number of attractions within the City of Swansea, situated in fairly close proximity to each other. The Swansea Grand Theatre is host to a vast array of cultural and entertainment based performances, and annually receives over a quarter of a million customers. However, it has been noted that audiences simply visit the Theatre to see a production then depart, thus disadvantaging other tourism attractions within the area[13]. Notably, this can be partly explained by a lack of complementary cultural and catering facilities in the area that might appeal to the same market.

Exhibit 17: Swansea Attractions

Attraction Name	*1997*	*1998*	*1999*	*2000*	*2001*	*2002*	*2003*
Swansea Leisure Centre	785,050	667,248	716,493	n/a	n/a	n/a	n/a
Swansea Grand Theater	229,771	247,953	269,120	256,420	232,917	243,766	n/a
Swansea Maratime & Industural Museum	110,715	100,773	100,275	98,787	n/a	n/a	n/a
Plantasia	53,003	56,188	68,893	65,069	66,677	81,221	n/a
Swansea Museum	47,775	50,062	45,843	49,687	51,352	51,100	72,036
Glynn Vivian Art Gallery	35,680	34,188	32,260	29,252	52,517	87,869	n/a
Mission Gallery	22,741	21,741	15,609	15,388	19,699	17,873	15,282

Source: Visits to Tourist Attractions, Wales Tourist Board, 2003. Note: City and County of Swansea 1995-1999; Sightseeing in the UK 2000. Swansea Maritime & Industrial Museum closed in October 2002, Swansea Museum took over the running of the two outposts (the Tram Shed and the Boats). Their visitor numbers have been added onto Swansea Museum's visitor numbers. Swansea Museum itself received a total of 47,891 visits in 2003. The Leisure centre closed in 2004.

Visitor Profile At NMGW

A number of museums within Wales are hosting more than 40,000 visitors per annum. NMGW's eight sites offered universal free admission from April 2001, eight months in advance of the charging English national museums. NMGW thus has more recent experience of this change than any other UK national museum. It is

[12] NB: ACORN categories are derived on an entirely different basis from the traditional socio-economic classes A, B, C1, C2, D, and E

[13] CCS Economic Development, Marketing and Tourism Division, 2000

interesting to note the findings from the 2001 NMGW Visitor Survey report which includes information on demographics of visitors to NMGW sites, but also other issues that may impact upon visitation and future marketing campaigns of NWMS:

- Free admission was a factor in the decision to visit a museum for around a third of visitors, especially the DE social classes and people from Wales.
- However, free admission was mentioned by only a very few respondents when they were asked spontaneously what had prompted their visit, suggesting that it was not the key factor for visiting.

Around two thirds of visitors were from the ABC1 social classes, but there has been an increase in the proportion of visitors from the C2DE social classes, mainly at National Museum & Gallery, Cardiff, Roman Legionary Museum and Welsh Slate Museum.

- Visitors were more likely to return to the museum in the next 12 months than they had been in 1998, especially at Roman Legionary Museum, Welsh Slate Museum, Museum of Welsh Wollen Industries and Big Pit.
- They were also more likely to have visited other National Museum & Gallery, Cardiff sites in the past year than they were in 1998.
- The increased visitor numbers do not appear to have decreased the enjoyment of visits.

In addition to these findings, information from the visitors to the Museum of Welsh Life in St Fagans may be a useful resource for National Waterfront Museum Swansea
as it has the closest match to the anticipated visitor profile:

- Over 60 per cent of visitors are in the ABC1 social categories.
- Over half visit in family groups (52 per cent).
- Nearly two thirds are local (within 30 minutes' drive time).
- Only 3 per cent travel for *more* than two hours to reach the Museum.
- Two thirds of visitors live in Wales itself.
- There is a high level of repeat visitation (68 per cent), and nearly a third visit at least twice a year, suggesting that the difference between *visits* and *visitors* is significant.

Visitor Projection

In a stabilised year – i.e. after the initial novelty effect of the new Museum has worn off – a baseline visitor projection of c.250k is assumed. A key benchmark against which to test this projection is the early performance of the original Swansea Maritime and Industrial Museum which attracted upwards of 200k visits in its first few years of operation. Given the scale of the Swansea Maritime and Industrial Museum and the fact that little capital investment was made to renew the product, its visitor numbers eventually stabilised at just over 100k. However, its early performance does indicate that there is a large latent market for a landmark National Museum of this type and theme, in this location.
Critically, the new National Waterfront Museum adds the following to the product offer:

- A new, iconic, and much larger building in an attractive waterfront location.

The combination of Swansea Maritime and Industrial Museum and NMGW collections, which significantly expands the breadth and depth of the story that can be told.

- Advanced internal design and interpretation, which has been specifically conceived to appeal to a much broader audience.

- The integration of a National Museum, the Leisure Centre, and a series of commercial units into a cohesive and attractive destination that can be developed, enhanced and marketed jointly as a single destination.
- Planned investment in the surrounding environment (esp. through landscaping, redevelopment of the car park and eventually improved infrastructural links to the city centre) with a view to enhancing the 'destination effect'.
- A planned programme of regular product renewal (enabled by appropriate revenue allocations in the business plan) which will keep the product fresh and inventive.
- A structured programme of special events and activities designed to encourage repeat visits and develop a core audience of regular users.

Given all of these factors and NMGW's recent experience of the consequences of free admission, Locum considers 250k visits per annum a realistic target in the long term (although included within this are repeat visits, school groups, and users of programmed Museum services such as behind-the-scenes tours, lectures, seminars and other activities). However, for business planning and programming purposes, it is worth noting that visitor numbers could be significantly higher in the first few years of operation. This is due to the novelty effect of a major new museum in a city with few direct competitors.

Plausibility Test

To test this visitor projection, Locum has explored what the implications of 250k visits would be in terms of likely penetration rates and visitor profile. Exhibit 18, below, provides a detailed penetration rate analysis. In Locum's experience, a not unrealistic proportion of each market segment would need to be attracted to the Museum in order to achieve the baseline visitor projection. Given the relative lack of direct competition, it is not unreasonable to expect high penetration of local resident and tourist markets, whereas penetration of markets further afield (but still in South Wales) would probably be significantly lower.

Exhibit 18: Penetration Rate Analysis

Market Description	*Population*	*Penetration %*	*Repeat Visit Factor*	*Visits*
Residents				
Castle Ward	11,500	5.00%	2.00	1,200
0-30 min drivetime (exc. Castle Ward)	500,000	4.00%	1.15	23,000
30-60 min drivetime	1,012,000	3.50%	1.00	35,000
1-2 hour drivetime	2,245,000	2.50%	1.00	56,000
Total residents	3,768,500	3.06%		115,200
Domestic (UK) Tourist Visits				
Swansea	365,000	5.00%	1.00	18,000
Rest of South Wales	5,735,000	1.00%	1.00	57,000
Total Domestic Tourists	6,100,000	1.23%		75,000
Overseas Tourist Visits				
Swansea	50,000	5.00%	1.00	2,500
Rest of South Wales	610,000	1.00%	1.00	6,100
	660,000	1.30%		8,600
Total independent and tourist visits				**199,000**

Group visits	*Population*	*Penetration %*	*Repeat Visit Factor*	*Visits*
School Age Children (60 minute drivetime)	278,562	10.00%	1.00	28,000
Total school visits				28,000

Other groups	*Mean Group Size*	*Groups/ Year*		*Visits*
Other educational groups	30	400		12,000
Tour groups	40	200		8,000
Total other educational visits				20,000
Total education and group visits				**48,000**
Free admissions / special promotions				
Total admissions				**247,000**

What this might imply in terms of visitor split and profile is shown below in Exhibit 19. Once again, a predominance of independent residents (47 per cent of all visits), followed by domestic tourists staying in South Wales (30 per cent), followed by organised groups (20 per cent, more than half of which would be schools), seems reasonable given Locum and NMGW's experience elsewhere.

Exhibit 19: Admissions by Origin

Independent	*Total*	*As per cent of independents*	*As per cent of total visits*
Residents			47%
Castle Ward	1,200	1%	0%
0-30 min drivetime (exc. Castle Ward)	23,000	12%	9%
30-60 min drivetime	35,000	18%	14%
1-2 hour drivetime	56,000	28%	23%
Domestic (UK) Tourist Visits			30%
Swansea	18,000	9%	7%
Rest of South Wales	57,000	29%	23%
Overseas Tourist Visits			3%
Swansea	2,500	1%	1%
Rest of South Wales	6,100	3%	2%
Total Independent Admissions	**199,000**	100%	81%

Groups	*Total*	*As per cent of Groups*	*As per cent of total visits*
Organised school groups	28,000	58%	11%
Other educational groups (LLL)	12,000	25%	5%
Tour Groups	8,000	17%	3%
Total Group Admissions	**48,000**	100%	19%

Free entry			
Special promotions / guests	0		0%
Total Admissions	**247,000**		100%