The impact of environmental improvements on town centre regeneration: A case study of Llanelli, South Wales.

Hall, Martin John

The impact of environmental improvements on town centre regeneration: a case study of Llanelli, South Wales

Martin John Hall

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DECLARATION

This work has not previously been accepted in substance for any degree and is not concurrently submitted in candidature for any degree.

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Abstract

Despite their widespread implementation, there has been little research to investigate the effectiveness of town centre regeneration strategies, or, in particular, the impact of public realm environmental improvements on the commercial health of those centres. Llanelli, a medium sized declining industrial town in South West Wales, whose environment was improved 1992-97, was chosen as a case study because it could provide an insight into the extent to which an improved environment might lead to wider regeneration. A multi-method research approach was adopted involving large scale residents' and trader surveys, pedestrian counts, GOAD plan analysis and interviews with key informants. Generalised comparisons of the Llanelli findings were also made with other towns in South Wales. Llanelli town centre was a popular shopping destination for a wide range of socio-economic groups in early 1997 although there was general dissatisfaction with the town centre's shopping facilities, especially the absence of a foodstore. At the same time, there was widespread acceptance that the environment of the public realm had been improved. The research suggests that the environmental improvements were not accompanied by a dramatic and short-term improvement in the economy of the town centre, nor its competitive status. There was, however, some evidence to suggest that the changes to the public realm brought minor benefits to businesses and helped secure a significant amount of private sector investment. The private investment included the opening of the new St Elli Shopping centre in late 1997 that led to a dramatic improvement in the range of shops in the town centre in subsequent years, including new multiples and an ASDA foodstore. A perceived association between environmental and economic improvement in other South Wales towns was also identified, though the evidence inferring a causal link was not strong.

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Chapter 1

The need for town centre research

Introduction

In the late twentieth century there was a growing realisation that town centre decline was becoming widespread in the UK and the USA (for example, Bromley and Thomas 1995; Davies and Howard 1988; DOE 1988; DOE 1994; DTEDC 1988; Guy & Lord 1993; HCEC 1994; Montgomery 1990; Robertson 1995; Robertson 1999; Rowley 1993). This led to concerns because of an array of problems that were associated with such decline (DOE 1994; DTEDC 1988; URBED 1999). In the 1990s, in the UK at least, much attention was focussed on how declining town centres could be revitalised through a combination of planning controls curbing out of town developments and a range of positive action to revitalise the town centres themselves (for example, DOE 1994; DETR 1999; HCEC 1994; Scottish Executive 1999; URBED 1999). Most town centre revitalisation programmes included proposals to improve the environment of the public realm, usually as part of a broader range of action (Fuller Peiser 1997). A conventional wisdom began to develop which asserted that in declining town centres an improved environment could help maintain a town's competitiveness or lead to an improved economy (Baldock 1989; Dickins and Ford 1996; Evans 1997). Despite substantial public investment in environmental improvements there has been very little research to test the plausibility of these assertions (DOE 1997a). Therefore, public investment is being applied with little knowledge regarding its effectiveness. Partly to plug the gap in knowledge, this thesis explores the impact of environmental improvements on town centre regeneration, using Llanelli town centre as a case study. As initial context, this chapter identifies the general aims of the research before presenting it as an exemplar of applied geography. It then discusses the reasons why the research is important, focussing on the scale of town centre decline, the problems associated with the decline and the value of town centres.

General research aims

South Wales is a major UK industrial region with many of its town centres in decline, as a result of economic decline in combination with competition from new out of centre retail facilities (BDP 1990; Bromley and Thomas 1995; Thomas and Bromley 1995, 2002; URBED 1997). In some cases major steps are being taken by the public sector, in partnership with the private sector, to halt or reverse this decline. Llanelli, having an urban population of about 36,400 (Management Horizons 1992), is a typical example of a medium sized industrial town in the region in decline, but where action commenced in 1992 to regenerate the town centre. Llanelli town centre was chosen as a case study to explore the effectiveness of the regeneration programme because it could provide an insight into the extent to which an improved environment might lead to an improved economy. It was also a town for which the researcher was able to gain detailed knowledge owing to his role as Area Development Manager for the Welsh Development Agency (WDA). The thesis aims to explore the impact of public investment, especially the impact of environmental improvements, on the economic health of town centres, using Llanelli as a case study. Its primary focus is on retailing because of its key role in the town centre economy. The general aims of the research are:

1. To review the literature on town centre regeneration, especially to explore policy, practice, and approaches to evaluation.
2. To explore the characteristics of Llanelli's changing economy and competitive status.
3. To identify the steps that have been taken by the public sector to restore vitality and viability to Llanelli town centre since April 1992.
4. To explore the impact of the changes to the environment of Llanelli town centre post 1992 and consider these in a comparative South Wales context.
5. To consider the policy implications of the Llanelli research for town centre regeneration in general.

The research, an exemplar of applied geography, aims to provide knowledge that will be useful to policy makers and practitioners whose goal is the regeneration of declining town centres. It fits with Patton's view of "the purpose of applied research and

›valuation", which is to "inform action, enhance decision making, and apply knowledge o solve human and societal problems", not to discover "knowledge for the sake of cnowledge" (Patton 1990: 12). It accords with "critical" research aims, "not simply to ıdd to knowledge but to change the world for the better" (Graham 1997: 29). It also fits vell within Pacione's definition of applied geography as being "concerned with the ıpplication of geographical knowledge and skills to the resolution of real-world social, ›conomic and environmental problems" (Pacione 1999: 1). Pacione acknowledges the ›riticism of those, such as Marxist or post modern theorists, who reject the value of ıpplied geography because it does not, for example, encourage revolutionary change, or ›ecause it might be used by the already advantaged in society. However, he rejects such ›riticism where such research is applied for the good of mankind. He says, " To ignore he opportunity to improve the quality of life of some people in the short term in the hope ›f achieving possibly greater benefit in the longer term is not commensurate with the ›thical position implicit in the problem-orientated approach of applied geography" Pacione 1999: 7). The lack of geographical research that is relevant to inform public ›olicy development is also a "fundamental problem" identified by Martin (2001: 189). It s logical that if research provides knowledge that is useful to better understand or solve ›ocieties' problems, then that research is of value, and is legitimate. The research, ›xploring the links between the "urban environment", "location", "administration" and 'retailing", also fits within the "schema of retail planning" developed by Findlay and Sparks (1999) "to facilitate organisation of the research foci" (Findlay and Sparks 1999: 11). Research that addresses the problems of town centre decline is important because own centres are of value, yet their decline is relatively widespread resulting in a range of ›hysical, economic and social problems. The remaining sections of this chapter explore hese issues further.

The concept of regeneration

Consideration of the concept of regeneration provides helpful context for a discussion on he need for research that informs town centre regeneration, an issue that is explored in his chapter. Town centres are an important component of our urban areas and, therefore, he concept of regeneration is explored in relation to the literature on urban and town cente regeneration. The notion of urban regeneration implies a process that aims to secre the sustainable revitalisation of economic, social, and environmental conditions in area the subject of decline (Roberts and Sykes 2000). It has been described as a "meaphor of developing capacity to "grow again", a possibility of "self renewal"" (Heley 1997: 105). The concept of urban regeneration has also been linked with the neec to improve "the quality of life of currently disadvantaged people" (Edwards 1997: 829, and a requirement to focus on "people as well as places" to bring about "the eradcation of poverty" (Chatterton and Bradley 2000: 109). Town centre regeneration alsoaims to bring about the lasting and holistic revitalisation of centres that are in declne. Evans (1997), for example, argues that regenerating town centres involves a "delcate balance" that addresses social, economic and environmental goals, through strategies that foster commercial prosperity, local culture and social cohesion observing "theprinciples of equity and social justice" (Evans 1997: 140). These matters are expbred further in an extensive review of the literature on town centre regeneration that is included in chapter 2.

Thescale of town centre decline

Onereason why research on town centre regeneration is important is because town centre declne is relatively widespread. The scale of decline is considered with reference to retailing, which is traditionally viewed as the principal function of the town centre. Evicence of the decline of many UK town centres is well documented from the late 1980s (for example, Bromley and Thomas 1995; Davies and Howard 1988; DOE 1988; DOE 1994; DTEDC 1988; HCEC 1994). The perceived extent of the decline of UK town centres was quantified in 1994. A survey of 335 planning officers, showed that 19% thought their town was in decline, compared with 45% who thought their town was stable, 29% who reported an improving situation and 6% who thought it was vibrant (DOE 1994: 5). Decline in central area retailing in North America has also been identified (for example, Guy & Lord 1993; Rowley 1993). Robertson reported that USA nationwide down town retail sales fell from 20% in 1954 to 4% in 1977 (Robertson 1995: 430). A national survey of 57 city planning departments of small downtowns in the USA in 1995 also provides some insight into the perceived scale of decline. "39 (68.4%)

indicted that their down town was more vital in 1995 than in 1985, while only 10 (17.6%) reported less vitality" (Robertson 1999: 282). This limited evidence suggests there was a perception that around a fifth of town centres in the UK and America are in decline.

The value of town centres and the problems of decline

Apart from the question of scale of decline, this research is also important because town centres are valued by government and several sectors of society including consumers, retailers, and town planners (DOE 1994; Evans 1997; Guy 1980; Morphet 1991; Scottish Executive 1999; URBED 1999). Their decline represents a loss of value and gives rise to various societal problems. Of course, the attributes that are valued in town centres and the problems of decline depend on the location, size and type of the town or city in question. They may differ, for example, in the UK in market towns, industrial towns, suburban centres, metropolitan cities, resorts and historic towns (DOE 1994). A distinction has also been drawn in the USA between down town development in large and small cities, and the fact that in the USA most of the research has focused on larger cities (Robertson 1999). There are, however, a number of attributes and problems that have been identified in the literature and that are now discussed from an environmental, social and economic perspective in order to underline the importance of research that might aid efforts to regenerate declining town centres.

Many town centres are valued because of their sense of place and identity that has resulted from development over a long period of time. This is often particularly evident in historic towns that have what Montgomery has called "a pre-capitalist urban heritage" (Montgomery 1990: 106). In declining town centres, these attributes are devalued as the physical fabric decays, buildings become drab or vacant, and sites become derelict (DTEDC 1988). "Urban assets" that society has invested heavily in become neglected or under-utilised (Evans 1997: 13); and the failure to protect the environment cuts across the governments' sustainability agenda (DETR 1998a).

'he unique environmental qualities of town centres and their public realm have been dentified as a means of facilitating social interaction (Montgomery 1990), a "meeting lace for citizens", and "a matter of pride among citizens" (Guy 1980: 118). As the nvironment declines and town centres become less attractive, the incentive to "linger for ocial purposes" diminishes (DTEDC 1988: iii) and civic pride is lost.

'he consumer also values the town centre's accessibility, especially the car-less onsumer, as well as the variety of shops usually afforded in such centres, and the wide ariety of other functions and services, including employment (Guy 1980). The decline of uch facilities may put the less mobile (the poor, the car-less, the elderly) consumers at a lisadvantage forcing them to use local inferior facilities, resulting in social inequality Bromley and Thomas 1995; Guy 1998a; Thomas and Bromley 1995: Montgomery 1990; Vestlake 1993). Similar concerns were raised by Davies and Howard who noted the otential for "polarisation of use of outlying and in-town shopping centres, by the better ff, car owning consumer and public transport users, respectively" (Davies and Howard 988: 18); and by Lever (1993). Social polarisation also cuts across the governments' ustainability objective to promote "social progress" for "everyone" (DETR 1998a: 3-4).

n addition to their environmental and social value, town centres confer economic benefit. 'hey are an important investment focus for property owners and retailers, and an mportant source of employment. Retailers benefit from their accessibility, the attraction of shoppers from trips unconnected to retailing and, independents, from cheap premises (Guy 1980). Some commentators believe that town centres also have a wider economic mpact. Rowley argues that the central business districts of cities "must be seen as a pecial feature of the inner city, a bonding mechanism for the wider urban region, and as n important component in the lives of inner-city residents" (Rowley 1993: 125). Certain major cities also have the potential to "be the engines of growth in their regional economies and underpin the success of the UK as a whole" (Charles *et al.* 1999: 1). The economic link between centres and their wider hinterland also explains why town centres "are frequently used as marketing devices to convey the distinctiveness and special qualities of a particular town, city, or region" (Evans 1997: 12). Declining town centres can suffer trade and employment loss, a weakened image, and lack of investment, sometimes resulting in "long term vacancies, failure to refurbish or modernise existing stores [and] replacement of good-quality mass-market retail offers by low-quality discounters" (Guy 1998a: 962). The decline of town centres may also adversely affect the economy of their hinterlands. This undermines the governments' sustainability objectives for economic growth and employment (DETR 1998a).

So far the literature suggests that town centres are valued because of their special environmental qualities, their role in fostering social interaction, their accessibility which assists social inclusion, and their economic value as centres of investment and employment. On the reverse side of the coin their decline gives rise to environmental deterioration, reduced social interaction, social inequality, disinvestment and employment loss. The problems associated with the decline of town centres are the antithesis of the principles of sustainability that have been championed by environmental groups and governments in the 1990s (DETR 1998a; DETR 1998b; European Commission 1998; The Scottish Office 1999); and debated by planners of retail change (Guy 1998a).

The need for town centre regeneration

The need for research to assist the development of strategies of town centre regeneration is, therefore, required not only because town centre decline is relatively widespread, but also because valued town centre attributes are being lost and an array of environmental, social, and economic problems have been identified. Such a view, however, presupposes that the process of town centre regeneration that usually involves some form of government intervention in retail change can be justified.

The relevant statements of government ministers on town centre regeneration illustrate their support for town centre regeneration. Firstly, in 1994 the then conservative Secretary of State for the Environment, John Gummer, said in the foreword to *Vital and viable town centres: Meeting the challenge*:

> "The policy is intended to help foster town centres which serve the whole community. Town Centres should provide a focus for retail development where competing businesses are near enough for shoppers to compare prices and benefit from competition. They should be places in which a wide variety of different uses are encouraged. In that way town centres will be attractive to local residents, shoppers and visitors, because they have lively restaurants and cafes, culture and entertainment, as well as interesting shops" (DOE 1994: iii).

More recently in 1999, Richard Caborn, Minister for the Regions, Regeneration and Planning said in relation to town centres, but especially market towns:

> "The Government is committed to revitalising our existing town centres. One of the first actions last year was to reaffirm our support for policies to get traditional town centre uses – shops, offices, leisure and entertainment, public services, including health and education – back into town centres. We want to focus new investment in these centres and to re-establish them as the focus for their communities and for their wider catchment areas. We want to see our market and other smaller towns revitalised" (URBED 1999: v).

Town centre regeneration also fits government planning and sustainable development policies. In England the government has a policy to sustain the vitality and viability of town centres; in Wales the policy is to sustain the attractiveness, vitality and viability of town centres (DETR 1996; NAW 2001; Welsh Office 1996, 1999). The government has refined their policies to encourage investment and regeneration in town centres, without totally excluding options for out of town development. They argue their "planning policy now incorporates sustainable development principles…[and]…. encourages developers to focus investment within urban areas, especially existing centres, rather than perpetuating the move to out of town sites" (DETR 1998a: 11). The Audit Commission also cites town centre revitalisation as an example of sustainable development (Audit Commission 1999). The theme of sustainable development, therefore, appears to be implicit in planning policies relating to town centres.

Sustainable development has been defined as being "about ensuring a better quality of life for everyone, now and for generations to come." (DETR 1998a: 3) The concept as proposed by government involves four broad objectives: "social progress which recognises the needs of everyone; effective protection of the environment; prudent use of national resources; and maintenance of high and stable levels of economic growth and employment" (DETR 1998a: 3-4). In terms of meeting the needs of everyone, as previously discussed, town centres do usually have the advantage that they are accessible to those with and without access to a car, and they have a social dimension. Town centres can also contribute to the objective of protecting the environment and safeguarding natural resources by providing an alternative to development on out-of-centre green field sites. They can also be important sources of employment and contributors to economic growth.

Some commentators have rightly pointed out that the government's sustainability objectives may conflict with each other (Lucas *et al.* 2000). For example, the promotion of economic growth can conflict with aims to protect the environment where new development out of town, with economic benefit, sucks the life out of the traditional High Street accelerating environmental decline. However, in declining town centres there is often potential to avoid such conflict, where the built fabric is a resource capable of use and reuse for economic, social and environmental benefit. Town centre regeneration fits the concept of sustainable development well.

The academic community also acknowledges the case for regeneration and the rationale for intervention in the market place. Evans (1997), for example, argues the case for town centre regeneration is strong:

> "Town centres should not be allowed to decline for want of an effort to resuscitate them. The case for regenerating town centres remains a powerful one. Their abandonment would impoverish the urban scene and create "edge cities" without a heart to them. The absence of a centre to urban life could also lead to disorientation and breed a sense of alienation and desolation. The prospect that British towns and cities could increasingly resemble their US counterparts continues to haunt us" (Evans 1997: 149).

Calls for intervention have also been justified where market forces are unlikely to improve declining shopping facilities serving disadvantaged consumers (Thomas and Bromley 1995). More generally, Guy (1998a) identifies the rationale for intervention in order to "improve efficiency", "control negative externalities" and "to protect or subsidise for social reasons". Improving efficiency might include "mechanisms for facilitating land acquisition and property development". Controlling negative externalities might include "protection of open countryside or control over the use of the private car". Social reasons might provide the justification to "control off-centre development in the interests of limiting social deprivation" (Guy 1998a: 964-965). These are all motivations that can drive efforts to regenerate declining town centres.

Research that can assist town centre regeneration is therefore of value because the scale of decline of town centres is widespread, the associated societal problems are significant, and town centre regeneration fits government planning and sustainability policies and therefore has some form of democratic legitimacy. The case for town centre regeneration has also received academic support, and can be justified where it improves retail efficiency bringing consumer benefits relating to choice and cost, minimises negative externalities, and helps promote social equality.

A balanced approach

However, it would be unbalanced to underplay the advantages of the new forms of retailing out of town, that have proven so popular with the car borne shopper, retailers, developers, and funding institutions. They typically offer the consumer convenience such as ample ground level free car parking, wide choice, competitive prices and a safe, clean, friendly well managed environment (Montgomery 1990; Thomas and Bromley 1993a). Guy (1998a) argues that these "efficiency arguments" relating to off centre retailing that benefit the consumer and respond to changing lifestyles are often neglected (Guy 1998a: 961). Out of town formats are particularly valued by women "juggling time budgets..[of]..work, housework and child-care" (Roberts 1997: 116), and can also appeal to dual income families who take advantage of late opening hours (Guy 1998a). They offer the retailer good footfall, modern and ample sized premises at competitive rentals. They offer the developers larger cheaper sites, with often less complex land assembly problems, and the institutions attractive investments with prospects of long term rental growth (Howard and Davies 1993). They may also bring to public authorities "financial windfalls in the form of capital receipts...rate income and planning gain" and the creation of employment (Montgomery 1990: 112).

Whilst many acknowledge the case for town centre regeneration, some authors have called for a balanced approach. Gayler (1989) drawing on Canadian experience argues that town centres and out of centre retail development can and should compliment each other. Whilst accepting the important role that town centres have, Gayler criticises the "middle class" pro town centre lobby who "tell the public what is good for them" by seeking to restrict popular out of centre facilities (Gayler 1989: 280). Gayler also recognises the powerful decentralisation forces at work believing that attempts to restrict change would be "a futile exercise at turning the clock back" (Gayler 1989: 280). Guy (1998a), like Gayler ten years earlier, has also questioned the feasibility as well as the ethics of excessive control of development out of town especially in the light of consumer preferences. The Metro and Meadowhall regional shopping centres have been successful, "particularly in drawing the higher spending customer" (Howard 1992: 79). As Guy notes, "The off-centre outlet still offers greater convenience and lower prices, which form the two main determinants of shopping choice for many consumers" (Guy 1998a: 977). Breheny (1995) has also questioned the feasibility and effectiveness of policies of urban containment, sometimes referred to as the "compact city" approach, that are designed to reduce transport energy consumption. In the context of their probable "unpopularity" with residents and businesses that have "voted with their feet" and fuelled decentralisation he questions whether they are "worth it" given that energy savings are likely to be "trivial". Breheny (1997) further questions the feasibility and acceptability of the "compact city" in terms of accommodating new housing growth in urban areas less popular with residents and businesses. Green (1998) has also questioned whether proposals for concentrating development within cities in order to "sustain the city and save the countryside" will work, partly because of the difficulties of attracting jobs to inner city areas (Green 1998: 346). Breheny (1999) has raised similar concerns that the "changing geography of jobs is counter urban...[and]...this must undermine the prospects for urban renaissance" (Breheny 1999: 355).

These arguments are convincing. The forces of decentralisation are strong and many consumers clearly choose to shop out of town as well as in town centres. Both aspects of retailing are valued. As Guy (1998a) puts it:

> "All over Europe, town centres are valued, protected and even subsidised by political interests, which in this respect appear to have a strong popular mandate. Consumers value their town centres, and their small local shops where these survive, but "vote with their feet" (or tyres) through shopping at conveniently located modern large stores" (Guy 1998a: 954).

The ideal future outcome would be to ensure we pass onto future generations a network of shopping facilities that includes attractive and vibrant town centres as well as the choice of convenient out of town formats. We need to "maximise the advantages accruing from the development of new facilities, while minimising the negative economic, social and environmental consequences of the decline of the conventional centres" (Thomas and Bromley 1993: 152). Most communities now have a range of town centre and out of town retail facilities within their locality, but many town centres are in decline. We need to revitalise our town centres to maintain this choice so that people have good quality facilities in and out of town centres (BCSC 1996). Research that can assist the development of effective models of town centre regeneration is therefore of value, even though the modern consumer values a range of shopping formats in and out of town.

The structure of the thesis

This chapter has set out the context for the research, its general aims, its position as an exemplar of applied geography, and its importance. The next chapter reviews the relevant practitioner and academic literature to provide further context for the research, and in particular, to identify gaps in knowledge that could usefully be filled by further research. Chapter 3 reviews Llanelli's late twentieth century decline and the plans that were implemented in the period 1992-97 to improve the environment and the shopping facilities in the town centre. Chapter 4 identifies specific research aims describing the varying impacts to be explored and the research methods used. Chapters 5-10 explore the varying impacts of the publicly funded environmental improvements on the town's use, economy and competitive status taking into account the varying perspectives of the residents, traders and key informants. Chapter 11 makes generalised comparisons of the Llanelli findings with other town centres in South Wales. Chapter 12 presents conclusions and considers the policy implications of the Llanelli research for town centre regeneration in general.

Chapter 2
Town centre regeneration

Introduction

A general aim of the research is to review the literature on town centre regeneration, especially to explore policy, practice and approaches to evaluation. The emphasis of the research, and therefore this literature review, is on the *retail* role of town centres. The research also has a practical aim and, therefore, the review covers practitioner as well as academic literature. Indeed, the academic literature on town centre regeneration is relatively limited compared with the more extensive publication of practitioner literature.

The review addresses four main topics:

1. The reasons why some town centres decline
2. The action that can be taken to revitalise declining town centres
3. The measurement of the effectiveness of action aimed at revitalising declining town centres
4. The evaluation of the impact of physical public realm improvements on the commercial performance of town centres

The first two topics review knowledge regarding the extent to which the state of the environment of town centres, and other factors, influence decline or revitalisation. This provides useful context to help satisfy the general research aims identified in chapter 1, especially aims 2 and 4. A review of the knowledge of measuring the effectiveness of revitalisation action provides information to inform the choice of methods to satisfy specific research aims and context for the review of the literature on evaluation. The topic on evaluation helps inform the identification of gaps in knowledge that the specific research aims, set out in chapter 4, are designed to satisfy.

The changing retail hierarchy in the UK during the late twentieth century

An overview of the changing retail hierarchy during the late twentieth century provides useful context for a discussion on town centre regeneration and, as elaborated in the next section of this chapter, the reasons why some town centres decline. During the period prior to the mid 1960s the retail hierarchy in the UK is usually described as "traditional". In general terms, it comprised the central business districts of larger towns and cities that provided "higher order goods and services" for a wide urban area, smaller town and district centres that provided "strong convenience" and "secondary comparison" functions, and a large number of neighbourhood centres that provided "a narrow range of convenience goods for the immediate residential population". The traditional retail hierarchy was viewed as an efficient and worthwhile means of serving the urban population (Bromley and Thomas 1993a: 6). The 1960s was also a period when geographers renewed their interest in theoretical models that helped explain the retail hierarchy and the patterns of clusters of commercial activity within towns and cities. Of primary importance in this respect were the variants of Central Place Theory initiated in the classical work of Christaller and Losch (Berry and Garrison 1969; Dickinson 1967; Garner 1967; Herbert and Thomas 1990). There was recognition that the scale and type of retail services offered in the various settlements were affected by a range of factors including "agglomeration economies" which influence the location decisions of retailers and other service providers (Richardson 1969: 70); and their "centrality" as a "convenient point of focus for consumers who visit to purchase the goods and services they need" (Berry 1967: 3).

Since the mid 1960s, population dispersal, an increase in the participation of women in the workplace, rising prosperity, increased car ownership and changes in the organisation of the retail industry have resulted in changes in shopping behaviour and the pattern of retail provision in the UK (Bromley and Thomas 1993a). These changes, including the development of new out of town retail formats, have impacted on the traditional retail hierarchy, and have in some cases contributed to town centre decline, an issue that began to become of increasing concern in the UK in the late 1980s and the 1990s. It is to a more detailed exploration of the reasons that some town centres decline that we now turn.

The reasons why some town centres decline

It is important to explore the reasons why town centres decline in order to better understand the rationale and value of strategies that have been devised to facilitate their regeneration. The literature suggests that a number of factors can contribute to town centre decline. These include economic decline which may partly reflect what DETR (2000c: 9) have called the "urban asset base" of a city; population and employment dispersal coupled with competition from new retail formats; and problems within the town centres themselves that reduce their competitiveness.

DETR (2000c) argue that "[Cities]...are affected both by other cities with which they compete and which they compliment, and also by their regional context" (DETR 2000c: 15). It is, therefore, probable that the strength of the economy of the whole town or its city region is a primary influence on the health of a town centre and its retail strength. This is because levels of disposable income in a shopping catchment area can affect trade as well as investor confidence. DETR (2000c) suggest that the economic performance of cites partly reflects "the different assets that cities have inherited or on which they have been able to capitalise" (DETR 2000c: 8). The assets identified are "location, age, economic structure, company characteristics, skills, learning and innovation, communications, quality environments and services, and local governance" (DETR 2000c: 9). The implication is that a wide variety of factors influence the strength of the economies of regions and towns which town centres serve. If those factors work together to weaken the economy of the region or city then they are also likely to be a contributory factor in a town centre's decline. A similar point has been made by others who argue that "urban policy needs...to be framed within [a] city-region context rather than be simply focused on the problem areas within parts of cities" (Charles *et al.* 1999: 1).

A myriad of social, economic and retail changes have fuelled the dispersal of activity and the new competition that has done so much to undermine the vitality and viability of many traditional town centres (Bromley and Thomas 1993a; Wrigley 1988; DETR 2000c). The scale of retail transformation associated with these changes has been so great that it has been referred to as "the retail revolution" (Bromley and Thomas 1993c;

Bromley and Thomas 1995; DOE 1994; Evans 1997; Gayler 1989). The dispersal of population and employment away from traditional centres was a common feature of the 1970s and 1980s (Breheny 1993; Bromley & Thomas 1993a; Champion and Townsend 1990; DETR 2000c) and encouraged new retail development out-of-town. In America, too, decentralisation has been a contributory factor in the decline of the "down town" (Robertson 1995).

The growth of new retail formats out of town, in "waves" of decentralisation, has been well documented and includes superstores, retail warehouse parks, regional shopping centres, warehouse clubs, factory shopping malls and airport retailing (Davies and Howard 1988; Fernie 1995 and 1998; Guy 1994; Langston *et al.* 1997; Schiller 1994; Stonham 1993; Wrigley 1988). For example, the number of out of centre superstores grew from 100 in 1975 to 350 in 1984; non-food superstores, particularly DIY, grew from 50 to 1090 over the same period, especially after the relaxation of planning controls in the late 1970s and early 1980s (Wrigley 1988: 10-13). Guy (1988a) noted estimates that out-of-centre retailing accounted for 25% of retail trade in the 1980s (Guy 1998a: 960). Others report that out-of-centre retail floorspace now exceeds 50% in many UK towns (Fuller Peiser 1997: 19).

Out of town centres have proven to be potent competitors to traditional town centres because of the wide range of goods they sell and the convenient, clean, safe and attractive well managed shopping environment they offer. Many out of town centres are not just shopping centres, but incorporate other attractions such as leisure facilities. Their strong appeal is that they offer "High Street" facilities, but with greater convenience for the car borne user (Evans 1997). The negative impact of trade diversion due to competition from regional shopping centres and other out-of-town formats is well documented. There is evidence that the Metro regional shopping centre in the north east of England drew trade from a wide area including nearby traditional centres, and disproportionately attracted the younger, more mobile and better off (Howard and Davies 1993). The impact of Merry Hill and Meadowhall regional shopping centres respectively on the town centres of Dudley and Sheffield was more marked (Schiller 1994). The health of the weaker more peripheral areas within the traditional town centres suffering competition from regional shopping centres may disproportionately suffer in what is known as the "compaction process" (Williams 1991). Other forms of out-of town retail development have also drawn trade away from traditional centres, resulting in "a spiral of decline" (Thomas and Bromley 1995). These, and other changes, have impacted on the traditional retail hierarchy (Brown 1993).

Town centres are also vulnerable to competition from other town centres that have sought to introduce new investment and management practices to draw back lost trade (Baldock 1989). In this context, it has been suggested that large towns appear to be gaining at the expense of smaller towns in terms of retail dominance (Baldock 1998; URBED 2000). The evidence of competition between town centres is also supported by a survey where "66% of local authorities felt town centre improvements were needed to compete with neighbouring towns, whereas 47% saw it as a need to compete with out-of-town centre schemes" (Fuller Peiser 1997: 2). In addition, internet shopping is a new form of competition, though currently with a relatively small share of retail expenditure (Gosling 1999; Pope 1997; Seidl 1999).

Problems within town centres can also adversely affect their competitiveness where their attractions, accessibility or amenity is inadequate (Baldock 1989; DOE 1994). Problems with attractions can include a poor range and quality of shopping, leisure and other facilities. Baldock (1989) reported surveys of multiple retailers in 1987 that showed concern because of the lack of supply of prime shop floorspace in town centres with too much lower quality secondary shopping provision. "Many town centres have failed to move with the times", and may not generally offer evening or Sunday opening hours or modern toilets or facilities for the disabled (Evans 1997: 28). Accessibility or transport problems may " include under-investment in public transport, car dependence, poor car parking facilities and traffic congestion in addition to uninviting access points such as dimly lit multi-storey car parks and fume filled bus depots and railway stations" (Evans 1997: 27; see also Baldock 1989). Poor amenity can relate to the environment or perception of safety. Some town centres have lost trade because of "environmental problems … such as crime and anti-social behaviour, and eyesores such as litter, graffiti and the effects of vandalism" (Evans 1997: 27), "inadequate building maintenance" or "lack of style and ambience" (Baldock 1989: 52). Oc and Trench "stress that many shoppers perceive city centres as unsafe and thus avoid using them…. As a result the retail sector is loosing its revenue and declining, particularly in the worst designed shopping centres" (Oc and Trench 1993: 168). Women are especially affected by safety fears (Oc and Trench 1993; Roberts 1993). Other authors agree that town centre vitality is influenced by the extent to which people fear for their personal safety (Thomas and Bromley 1996).

The literature, therefore, suggests that town centres decline because of the changing economic context of the town or region within which they are situated; the dispersal of population and employment and the changing competitive context; and problems within the town centres themselves. All these factors may impact at the same time but to different degrees in different locations so it is difficult to draw general conclusions as to whether some are more influential than others in stimulating decline. The review is, however, useful in providing a context to explore the role of the state of the environment as a contributory factor in town centre decline. The inference from the review is that the role may not be great for two reasons. Firstly, the state of the environment is just one of many factors within a town centre that might affect its competitiveness. Secondly, other external factors, the economic and competitive context, also influence the health of a town centre. Regeneration strategies must, therefore, comprehensively address the various factors that cause town centres to decline if they are to be effective. It is to a review of the literature on town centre regeneration that we now turn to explore the range of factors that they address.

The action that can be taken to revitalise declining town centres

In the early 1990s the call for positive action to revitalise town centres was gaining momentum (DOE 1992; Montgomery 1990). This view was reinforced in 1994 by a government enquiry into the future of shopping centres which recommended a dual approach for future action focussed on planning controls, and positive action to improve the competitiveness of town centres themselves (HCEC 1994). What followed were revisions to planning control guidance and a series of publications offering practitioners and others advice on how to revitalise town centres and market towns, and the role of partnerships and management in doing so. This literature is now reviewed in order to identify the principal changes in planning control that are relevant to town centres, and the main models of town centre regeneration that have been proposed.

The major recent shift in emphasis in planning controls in the UK is reflected in the changes to Planning Policy Guidance note PPG6 between 1993 and 1996 (DETR 1996; DOE/WO 1993). These followed the government inquiry referred to above and the publication of the watershed document *Vital and viable town centres: meeting the challenge* (DOE 1994). The change involved a tightening of planning control presuming against out of town development with priority to be given to development within town centres, or on the edge of town as a next best option. Similar polices apply in Wales (NAW 2001; Welsh Office 1996, 1999). However, because of the large volume of out of town planning consents subsisting in 1996 (Hillier Parker, 1999; Schiller 1994), critics have argued that, "the change in government policy has come too late" (Guy 1998b: 305). Notwithstanding the debate concerning the feasibility of controlling dispersal (Breheny 1995, 1997; Guy 1998a) the change in government planning policy is, at least, an attempt to address one of the causes of town centre decline discussed earlier in the chapter.

However, controlling retail dispersal alone will not necessarily result in town centre revitalisation as positive action within town centres is also required. The key components of town centre regeneration strategies were being identified in the early 1990s. These included the need for more efficient town centre retailing, more leisure, better public transportation and car parking, an improved environment with higher standards of design, enhanced town centre management and stronger commitment from the local authorities (DOE 1992; Montgomery 1990). Following similar themes, the 1994 DOE report *Vital and viable town centres: meeting the challenge* proposed a model for revitalising UK town centres involving improving attractions, accessibility, and amenity through action involving partnership, management and monitoring (DOE 1994). An extensive literature on town, city and district centre regeneration followed including contributions from government departments, academics, and the retail industry (for example, Boots 1996, 1999; Bromley and Thomas 1995; Collis *et al.* 2000; DETR 1999; Evans 1997; Montgomery 1998; Thomas and Bromley 1995; Scottish Executive 1999; URBED 1999, 2000; Vision for London 1996). The essence of the advice contained in these and other publications is elaborated later in this chapter. It is, however, worth noting at this point that much of the practitioner advice focuses on action that can be taken within town centres and pays scant attention to the importance of tackling regeneration of the economies of the towns as a whole, or the regions they serve. The eleven principles of town centre regeneration set out in Table 2.1 overleaf serves to illustrate this point, as they focus within the town centre ignoring the regional economic and competitive context (DETR 1999). This is a weakness, because, as discussed earlier in the chapter, the health of a town centre is affected by the health of the hinterland within which it is located. Strategies aimed at regenerating declining town centres must look beyond the immediacy of the town centre boundary if they are to comprehensively address the causes of town centre decline.

However, more recently the need for a wider perspective has been recognised linking the health of a town centre to the health of the local and regional economies on which they depend (BCSC 1996; Charles *et al.* 1999). The need for coherent regeneration through effective partnership at various spatial levels, neighbourhood, city, sub regional, regional has also been recognised in a recent study of nine urban areas in England, Scotland and Wales (Carley *et al.* 2000), and in a review of the work of English Regional Development Agencies (Robson *et al.* 2000). The government and its advisors have also identified broader solutions for the "renaissance" of English urban areas in the recently published Urban White Paper that that was partly informed by the work of the Urban Task Force (Urban Task Force 1999; DETR 2000b; RICS 2000).

Table 2.1 - Principles of town centre regeneration

1. Every High Street needs its own vision
2. High Streets with a robust mix of sectors and uses will sustain investment
3. Good design and investment in the public realm attracts private investment
4. Sustained town centre management underpins investment and builds confidence
5. Selective promotion of the High Street develops identity
6. "Fit for purpose" public-private partnerships are a key mechanism for investment
7. Nurturing local private business and investment leads to longer term inward investment
8. Local authority leadership is vitally important
9. Lively, animated High Streets attract investment
10. A quality transport offer leads to investment
11. Secondary and tertiary centres should be nurtured, since they play an important role in sustaining communities

Source: DETR 1999: 8-9

Town centre regeneration strategies have also been promoted in the North American continent. Robertson (1995) reviewing USA downtown regeneration strategies in the second half of the twentieth century noted they typically involved combinations including pedestrianisation, indoor shopping centres, historic preservation, waterfront development, office development and special activity generators such as convention centres, arenas, and stadiums. Not all USA schemes are publicly led and the highly influential role of private sector commercial interests in some city centre revitalisation initiatives has been criticised as resulting in a lack of benefit to neighbouring community groups (Brooks and Young 1993). There has been some reaction against an overemphasis on property solutions. Falk (1996) notes that, "The disillusion with public "flagships" has led to a return to the basics of "clean, safe and friendly" streets" (Falk 1996: 1; see also Antupit *et al.* 1996). Such an approach has been incorporated into the USA Main Streets revitalisation programmes that revolve around four main themes: economic structuring, organisation, design and promotion and place great emphasis on monitoring the effectiveness of action to maintain community business and government support (Lawson

Smith 1998). Researchers in the USA have also explored the needs of smaller cites and have emphasised the importance of partnerships, multifunctional uses, and the creation of environments that offer a distinctive sense of place (Robertson 1999). Responses to "down-town" regeneration in Canada involve the development of enclosed malls to "beat the [out of town] shopping centres at their own game" or an emphasis on building on the "uniqueness/heritage themes" involving effective management, quality design, enhanced pedestrian circulation, improved streetscapes, and excellent service (Gayler 1989: 279).

Strategies have, therefore, been evolved to revitalise declining town centres in the UK and elsewhere including the USA. We now focus in more detail on some of the key elements of those strategies for improving attractions, accessibility, amenity and partnership management in declining town centres to provide further context for this research. These are the common themes that have been identified as being important in affecting the vitality and viability of a town centre (DOE 1994).

Improving attractions

Improving attractions within a town centre clearly involves improving the shopping offer by attracting the range and quality of shops that better enables a town to compete for trade. This is sometimes achieved through the provision of a new planned shopping centre within the town centre, or the provision of a new foodstore. Such new retail provision might benefit the town centre by re-capturing trade that has been lost through, for example, "outshopping" (Bromley and Thomas 1995; Collis *et al.* 2000: 164; Thomas and Bromley 1995). However, in certain circumstances a new planned centre "can hasten the decline of the remainder of the centre" unless more expenditure is attracted to the town as a whole (Guy 1994: 108) and "accelerate the closure of small shops" by diverting trade from existing shops (Montgomery 1990: 113).

It is, however, well recognised that town centres are much more than shopping centres, and that the key to a successful town or city centre is the diversity of its attractions (DOE 1994; Evans 1997; Jacobs 1961; Montgomery 1995; Pollock 1997). Diversity of uses can help improve vitality in different parts of the town in the day and the evening. As well as shops, new homes, educational establishments, hotels, cinemas, leisure centres, swimming pools, cafes and restaurants, churches, markets, arts and cultural facilities, can all help keep a place lively and attract custom to assist the viability of town centres uses. Compared to some continental countries such as France, UK families have been traditionally less willing to live in town centres (Couch 1997), and the scale of new UK city centre housing has been relatively limited (Couch 1999). Nevertheless, leisure and residential uses have been suggested as potential uses to revitalise small town centres, with the advantage that they could bring empty buildings into use and support the retail and service functions in the town (Guy 1999). Living in town centres might especially appeal to young people 18-25 or those who are older without children (Schiller 1994). Leisure shopping, especially food and drink, is a growth area that appears particularly suited for town centres and could help replace the "steady decline in routine retailing" predicted for the majority of UK town centres (Schiller 1998: 38). Some pub companies have responded to this growth area by developing the "superpub" concept in town and city centres (Jones 1996). Towns and cities such as Birmingham and Bradford have also developed distinct areas or "quarters" to "enrich their character and help revitalise local economies and boost tourism" (Anderson 1993).

It has long been recognised that culture is an important ingredient of civic life and cultural facilities should be a feature of town centre diversity (DOE 1992).
Major cities such as Birmingham, Glasgow, London and Newcastle launched "new cultural strategies" in the 1980s in part to support urban regeneration objectives and the "re-imaging" of urban areas through "place marketing" (Bassett 1993; Paddison 1993). The types of "artistic/cultural activity" embraced by city regeneration strategies includes museums, performing arts, cultural districts, town trails, public art, festivals for arts or music (Griffiths 1993; Murdin 1997). The combination of facilities and events is important, the latter being an example of what Montgomery has called "soft infrastructure" (Montgomery 1995). Griffiths (1995) argues that the role of culture in town regeneration serves three purposes: "promoting civic identity" to revitalise "public social life"; develop "cultural industries" as "an important form of wealth creation in its own right"; and "city boosterism" which is "using arts as instruments of city promotion"

(Griffiths 1995: 254-255). It can also help forge effective partnership working, as in the case of Bristol (Griffiths 1995).

Cultural policies have also been used to revitalise night life in many European cities, though more so on the continent than in the UK (Bianchini 1995). Bianchini (1995) has discussed ideas for developing night time uses further and identified areas for further research (Bianchini 1995). Cities such as Cardiff, Leeds and Manchester have sought to exploit the "evening economy", but this has raised some concerns regarding safety perceptions and crime levels (Heath and Strickland 1997; Johnston 1997; Lovatt 1997). As a result it has been argued that partnerships between the police and town centre stakeholders are required to address these problems (Jones *et al.* 1998). Others have suggested that the "respectable classes" should be more tolerant of the new night time scene (Lovatt and O'Connor 1995: 133) and called for sensitive policing (Cummings 1999).

A high quality of service within a town centre can be an attraction. Friendly service, and local distinctiveness, can also provide a competitive edge. Some towns, such as Leominster, have introduced loyalty card schemes to compete with the major supermarkets, and these have galvanised the trading community to work together to make their towns more competitive, and may have helped increase the trade of some retailers (Hallsworth 1998; Walsh 1997). They can also "provide their sponsors with an icon around which they can formulate other regeneration activities" (Worthington 1998: 76).

A broad consensus has developed as to the type of attractions that can assist the appeal of town centres. Typical examples are set out in Table 2.2 below. The content of the table is not ordered in terms of any importance suggested by the three different sources, but simply in terms of attractions.

Table 2.2

Attractions in town centres

Vital and viable town centres: meeting the challenge (DOE 1994)	*Regenerating town centres* (Evans 1997)	*New Life for Smaller Towns* (URBED 1999)
	Mixture of land uses	
Multiple retailers		Accessible foodstores
Specialist shops		Friendly individual shops
Distinctive markets		A lively market
Restaurants and cafes		Good places to eat and drink
Regular events		Promotion and events
Housing	Housing	Living in town
Offices and business centres	Economy [Opening hours, evening economy, small businesses]	Enterprise development
	New technology to enhance urban liveability	
Public service facilities	Balanced social provision to avoid exclusion	
Education and health facilities	Open space	
		New uses for empty shops
		Value for money
Cinemas theatres art centres or cultural zones	Arts and culture	Tourism
Libraries and museums		

Accessibility

Accessibility is also thought to be an important influence on the competitive position of a town centre. Adequacy of signage, car parking and issues such as car parking charging policies are very relevant to the car borne shopper. The need to widen choice to facilitate accessibility to the town centres by those who wish to walk or cycle, catch a bus or train is also important to attract custom, serve the community in a more inclusive manner, and encourage more sustainable travel patterns. Bromley and Thomas (1993a) argue that "improvements in accessibility will need to be given as much attention as the enhancement of the shopping attractions of the traditional facilities if the latter are to continue to flourish". They stress the need for "high turnover shopping car parks", and "improved public transport" to "enhance the status of city centres" and "provide for the needs of consumers who do not have access to cars" (Bromley and Thomas 1993a: 253-254). The problems of traffic congestion, which hamper accessibility, remain an unresolved problem in many towns and cities. Changes to working and shopping habits through, for example, developments in technology might reduce the need for some people to travel to town. Reductions are not guaranteed and Lawrence argues that, "measures to encourage (and even force) car users to switch to public transport must continue" (Lawrence 1996: 6). However, many consumers are reluctant to use public transport, and retailers and consumers continue to demand in-town car parking (Guy 1998b).

In town centres seeking to become more competitive by attracting new investment and people, there is an unresolved policy conflict between enhancing town centre viability by providing new car parks in town centres, and reducing traffic congestion in town centres by discouraging car journeys. City Council proposals to reduce traffic congestion in Sheffield by restricting car use in the heart of the city centre resulted in concerns raised by the Chamber of Commerce that people would be forced to shop elsewhere in places like Meadowhall where convenient car parking is provided (Williams 1991). Other Local authorities have been reluctant to discourage the car unless improvements to public transport have been implemented first. In 2000, Leeds City Council threatened to abandon its "pioneering role in promoting congestion charging" through electronic tolling because it claims the government's transport plan settlement was insufficient to enable the Council to improve public transport infrastructure (*Planning* 7 Jan 2000: 1-3). Typical examples of the factors that can affect accessibility are set out in Table 2.3 below.

Table 2.3

Accessibility in town centres

Vital and viable town centres: meeting the challenge (DOE 1994)	*Regenerating town centres* (Evans 1997)	*New Life for Smaller Towns* (URBED 1999)
Signs	Welcoming signs	
Safe convenient car parks		Convenient parking Safer parking Appropriate charging policies
Pedestrian priority areas/traffic calming	Putting pedestrians before cars Cycling and pedestrian networks	Easy and safe cycling and walking
Mini bus/rapid transit systems Public transport interchanges Bus priority measures	Integrated advanced public transport	Responsive public transport
Access for all	Access-prices, physical e.g. disabled	
Distinctive gateways	Permeability and legibility	

Amenity

Much of the literature deals with the issue of amenity as a means of creating pleasant, clean, well maintained, secure places with their own identity (DETR 2000b; DOE 1994;

Smith 1974). Studies have also recognised the environmental benefits of pedestrianisation in terms of a reduction of air pollution and noise (Chiquetto 1997; Whelan 1994). The link between urban design and amenity has also been recognised (for example, Cullen 1971; Hillier *et al.* 1993; Punter 1996; Tibbalds 1992; Tomalin 1998; Urban Task Force 1999). In creating quality amenity it has been argued that the process of managing change, such as giving consideration to the needs of the various users of urban spaces, is important as well as the visual context (Punter 1996; Tomalin 1998). It has also been suggested that community involvement at the early stage of a town improvement scheme can improve the prospects of making the best design decisions (Mercer 1999).

There have been some concerns that retail change has adversely affected the amenity of towns and cities. The "multiple dominated" nature of UK High Streets "where one town centre could be anywhere else" that has prompted criticism from some quarters (Montgomery 1990: 113; see also DOE 1992) even though the shopping facilities may be what the consumer wants. Schiller notes that some new shopping centre development has resulted in a "loss of individuality" and the destruction of historic street patterns (Schiller 1994: 46). The shift of public realm from public to private ownership is also regarded as problematic by some in the UK and the USA (Goheen 1998; Jackson 1998; Loukaitou-Sideris 1993; Punter 1996; Zukin 1996). Such a shift can occur, for example, when privately funded covered shopping centres in town centres shut out the public in the evenings.

Concern to improve the quality of the public realm and the built environment has resulted in the development of a range of design guidance (DCMS 2000; DOE 1997a; DETRa 2000; Hillman 1990). The literature also provides a wide range of technical advice on the implementation of pedestrianistion and other street improvement schemes (Evans 1999). The Landscape Institute, for example, provide policy and technical advice on inner city regeneration and "the active promotion of better street planning and design for the benefit of pedestrians" (The Landscape Institute 1996: 4; see also Pollitt 1996). Falk (1996) argues that successful regeneration schemes need "soul", "the indefinable quality that makes a place special and draws people to it", and provides guidelines for creating lively streets (Falk 1996: 2-7). Practical guidance has also emerged from reviews of the quality of the design of UK pedestrianisation schemes (Hass-Klau 1990; James 1995; Loxton 1995), though it has been acknowledged in some quarters that there is a lack of knowledge regarding why some pedestrianisation schemes succeed and others fail (Evans 1999).

As previously discussed, improving safety and reducing the perception of fear is also a concern that has been identified as influencing town centre vitality (DOE/WO 1994; Jacobs 1961; Lockwood 1997a; Oc & Trench 1993; Oc 1991; Oc and Tiesdale 1997a; Thomas and Bromley 1996; Bromley and Thomas 1997). Oc & Trench (1993) suggest a combination of land use planning and improving environmental conditions can affect perceived safety in city centres. They advocate mixed uses and "activity corridors" to increase "opportunities for natural surveillance" in order to reduce "opportunistic crime and people's fears". They also believe that better lighting and an improved environment can enhance perceptions of safety in the short term (Oc & Trench 1993: 169). Some of these contentions are supported by comparative studies of Cardiff and Swansea that showed that "a compact retail core appears to enhance the peace of mind of shoppers" due to "the concentration of activity and natural surveillance" (Thomas and Bromley 1996: 485). A further study of the same two cities showed that the location, design and security of car parks affect levels of vehicle crime (Bromley and Thomas 1997). Strategies to develop safer cities incorporate a variety of approaches including town centre management, policing, CCTV, lighting, parking and housing (Oc and Tiesdale 1997a); and initiatives to reduce shoplifting (Nelson *et al.* 1996).

There is a general consensus that amenity improvements must usually be applied in tandem with other initiatives to be effective (DOE 1994). Studies of declining small town centres reinforce this message and suggest that an integrated approach is necessary involving improvements to shopping and service provision as well as to the general quality of the environment (Bromley and Thomas 1995).

Typical examples of the factors that can affect amenity are set out in Table 2.4 below.

Table 2.4
Amenity in town centres

Vital and viable town centres: meeting the challenge (DOE 1994)	*Regenerating town centres* (Evans 1997)	*New Life for Smaller Towns* (URBED 1999)
Effective lighting		Better street lighting
Hard landscaping improvements Greening/soft landscaping Removal of clutter	Well designed street furniture Environmental quality	Higher quality streetscape
Shop front building refurbishment		Improved shop fronts
	Heritage	Building upkeep and conservation
Temporary use of empty shops		
Frequent cleaning	Urban design and maintenance	Well kept streets
Crime prevention initiatives	Crime [Security, safety]	Safer streets

Partnership management

A key theme in the literature on town centre regeneration is the need to involve the business and social community in devising a "shared vision" for the town to foster a sense of ownership and increase the prospects of success (DOE 1994). Partnership working is also advocated as the best means of securing support for projects and also attracting resource for initiatives such as town centre management or investment in capital projects to improve town centres (DOE 1997b). Government regards partnerships between the public and private sectors and town centre management as essential ingredients of town centre revitalisation (DETR 1996). The Urban Task Force also identified the management of town centres as a priority and recognised the contribution that centres make to the prosperity of the wider town and city (Urban Task Force 1999), as has the government in the Urban White Paper (DETR 2000b).

The concept of the management of town and city centres developed in the UK mainly as a response to the threat of out of town shopping developments whose competitive advantage was attributed partly to the way they were managed. Early successful management initiatives in cities such as Norwich, and the Main Street initiatives in the USA and Canada were also positive influences (Oc and Tiesdale 1998). Significant growth in the application of the principles of town centre management stemmed from the formation of the Association of Town Centre Management in the UK in 1991. It is estimated the number of town centre management posts increased from nine in 1991 to over 200 in 1997 (Medway *et al.* 1998: 1).

Some early reviews of town centre management practice identified the main focus of action as capital improvements to the environment, co-ordination of public services and private initiatives, and promotion to attract expenditure, investment and improve image as a stimulus to economic development (Baldock 1989; Crouch and Ward 1992; Jones 1990). In the mid 1990s town centre management was criticised as having too narrow a focus, acknowledging "little life beyond retailing and seldom aspir[ing] higher than the housekeeping role that may exceed the janitorial, but is essentially domestic and introverted" (Haywood and McGlynn 1995: 328). More recently the broader role of town centre management has been recognised as aiming to "to bridge the gap between the public, private and voluntary sectors by working with, and understanding the priorities of, all those with an interest in town centres" (Tallentine 1999: 15). Others hold a similar view (Warnaby *et al.* 1998; Scottish Executive 1999).

It is widely acknowledged that there is inadequate funding for town centre management (Ashworth and Clark 1997; DOE 1997b; Falk 97; Macneil 1999; Mercer 1997; Wheatley 1997). This has prompted some to argue that the government should "bite the bullet" to address funding strategies for town centre management (Tomalin and Pal 1994), as funding is unlikely to come voluntarily from the private sector. Very few retailers provide financial support towards the cost of running such schemes (Medway *et al.* 1998), giving rise to the problem of "free riders" (Forsberg *et al.* 1999). Furthermore, major retailers such as Sainsbury and Boots who have financially supported town centre management schemes, have hinted their future support may depend on validation of the benefits of such schemes (Medway *et al.* 1999; Walsh 1998). In recognition of these difficulties, a recent Urban White Paper includes a proposal to consult on the merits of funding town improvement schemes through a supplementary business rate with agreement from the business community (DETR 2000b).

Land interests are typically complex in town centres and, therefore, development will not always be feasible without public sector use of compulsory purchase and other procedures. Furthermore, many town centre developments are not viable and, therefore, require public financial support (Jones 1996). These issues have been recognised by the government's Property Advisory Group, which has recommended a range of actions by the commercial property sector, government and local authorities to facilitate sustainable town centre development. These include, for example, public sector "gap funding" for development or redevelopment projects and greater use of compulsory purchase powers by local authorities to improve town centres and their accessibility (DETR 1997).

Inadequate monitoring of the effectiveness of town centre management and a lack of research into "user perceptions" is an issue. Page and Hardyman (1996) argue that, schemes "are pursuing costly place marketing strategies and capital improvements in the town centre environment without detailed knowledge of the costs and benefits to their locality" (Page and Hardyman 1996: 162). Others agree that, "there is little indication of the impact of town centre management, particularly in terms of the health of town centres" (Ravenscroft 2000: 2536), though there is a strong perception amongst town centre managers that the impact of their work has been positive (Hogg and Medway 2000).

Overview of town centre regeneration strategies

A combination of planning control and proactive action at national, regional and local level has sought to address the factors that have influenced the decline of town centres: economic decline, dispersal, competition and problems within the town centres themselves. Strategies within town centres have focused on improvements to attractions, accessibility and amenity, implemented through partnership management. Improvements to the environment have been incorporated into strategies to regenerate declining town centres, but as they usually only form one element of a range of initiatives to regenerate town centres, it is possible their influence may not be that great. In the UK, town centre regeneration strategies have been widely applied following encouragement by the government, and organisations such as the Association of Town Centre Management and Action for Market Towns (AMT 1997, 1999a; ATCM 1994, 1999, 2000). The evaluation of the effectiveness of these strategies has been less than comprehensive, partly because of the difficulties of measuring the outcome of the application of regeneration action.

The measurement of the effectiveness of action aimed at revitalising declining town centres

In the mid 1990s the increasing focus by the government and others on the need to regenerate town centres was accompanied by the exploration of methods of measuring vitality and viability using indicators of the health of a town centre (AMT 1999b; DOE 1994; Hogg & Medway 2000; Pal and Sanders 1997). These indicators were identified to compare the health of different towns, and changes to their health over time, and also to assist evaluations of the success of investment initiatives to improve town centres. Table 2.5 shows some of the indicators identified by the government and others including the Association of Town Centre Management (ATCM), the Royal Institution of Chartered Surveyors (RICS) and URBED (Chase 1994; DETR 1996; DOE 1994; DOE 1997a, 1997b). More recently, retailers such as J. Sainsbury and Boots have suggested a wider range of indicators (Hogg and Medway 2000). Research on how to measure vitality and viability and the impact of investment in changing the health of town centres is still in its infancy, as is the measurement of the effectiveness of town centre management (Pal and Sanders 1997).

Table 2.5

Indicators for assessing town centre vitality and viability

Indicator	RICS 1994 (1)	URBED 1994 (2)	Government Planning Policy 1996 (3)	ATCM 1997 (4)
Rents	*		*	
Retail demand	*	*		*
Retailer representation	*	*	*	
Pedestrian flows	*	*	*	*
Vacancies	*	*	*	*
Diversity of use	*	*	*	*
Physical structure	*	*	*	
Yields	*	*	*	*
Environmental quality			*	*
Accessibility			*	*
Customer views			*	
Perception of safety/occurrence of crime			*	*
Sales trends				*
Business formation				*
Employment formation				*
Investment				*

Note * shows that the indicator is referred to in the relevant report

Source: (1) Chase 1994; (2) DOE 1994; (3) DETR 1996; (4) DOE 1997a, 1997b

As previously discussed, the earliest comprehensive report on the challenge of enhancing the vitality and viability of UK town centres was prepared by URBED (DOE 1994). URBED advised that: "vitality is reflected in how busy a centre is at different times and in different parts whilst viability refers to the ability of the centre to attract continuing investment, not only to maintain the fabric, but also to allow for improvement and adaptation to changing needs" (DOE 1994: 55). They recommended the use of pedestrian flows and yields respectively as key indicators of vitality and viability (DOE 1994: 54). Yield is "the ratio of rental income to capital value and is expressed in terms of the open market rents of a property as a percentage of capital value" (DOE 1994: 58). Pedestrian flow is a measure of the number and movement of people using town centre streets (DOE 1997a: 24). URBED recognised that whilst " no single indicator can effectively measure the health of a town centre....together they can provide an effective insight into the performance of a town centre and so offer a framework for assessing vitality and viability" (DOE 1994:56). In addition to the use of indicators, URBED advocated the use of "health check" surveys of a town's attractions, accessibility, and amenity in order to identify weaknesses that require action to enhance vitality and viability (DOE 1994). The subjective nature of this approach has, however, attracted some criticism (Tomalin 1997).

Since the publication of *Vital and viable town centres: meeting the challenge* (DOE 1994) there has been an extensive debate in the literature about the strengths and weaknesses of the use of various indicators for assessing the health of town centres (for example, BCSC 1996; DETR 1998c; Tomalin 1997; Londonomics Ltd 1998; Sandahl and Lindh 1995; Raggett 1996; Ravenscroft 2000). Most commentators would agree that the use of indicators can assist an evaluation of the health of a town centre, but there is disagreement as to the relative merits of particular indicators. For example, compared with URBED (DOE 1994), Chase (1994) was reluctant to use yields as a main indicator for reasons discussed later in the chapter. There has also been criticism that there is "no guidance…as to the relevance of particular indicators for different size of towns" (DETR 1998c: 95). For market towns, indicators such as "diversity of uses, retailer representation, proportion of vacant street level property, pedestrian flows, and the state of the town centre environment" may be more relevant than rental or yield information (DETR 1998c: 95). Indicators may also vary in their sensitivity to change. The impact of new foodstores might have almost an immediate effect on the turnover of retailers in a town centre but may not result in short term change to rentals, yields, or vacancy rates (DETR 1998c: 96). Government guidance on the collection of data for indicators as set out in the various versions of Planning Policy Guidance (PPG) 6 has also been criticised as being "unclear and potentially contradictory" (Tomalin 1997: 383). Certainly government thinking changed in terms of priority measures for vitality and viability. In the July 1993 PPG 6 commercial yields and pedestrian flows were the top measures, compared with diversity of uses and retailer representation and change in the June 1996 PPG 6 version (Raggett 1996).

Published information is most readily available from the major firms of chartered surveyors and CCN Goad Ltd for indicators such as rents, retail demand, retailer representation, pedestrian flows, vacancies, diversity of use, and yields. In contrast, specialist surveys are usually required to obtain data for indicators such as physical structure of the town, environmental quality, accessibility, customer views, perception of safety or occurrence of crime, sales trends, business formation, employment formation, and investment. Since published data are relatively easy and less costly to obtain than data from specialist surveys it is important to review the literature to explore the strengths and limitations of using the indicators that rely mainly on published data.

Several commentators agree that rental information can be a useful indicator of the retail strength of a town centre. Colliers Erdman Lewis (1994) argues that rental performance is a good indicator of retail strength, since it reflects retailers perceptions and levels of profitability. Chase (1994) agrees that "rental tone and history of rent movements" is one of several main indicators of value in measuring town centre vitality that compares more favourably than the use of yields because of its accuracy. However, lack of comprehensive data and the difficulties of accurate comparable analysis are weaknesses that devalue the use of rental information as a measure. Evans (1997) states their value is limited because "of their orientation towards larger centres, focus on prime pitch, and reliance upon volume of transactions for their reliability which can be a problem in a recessionary climate" (Evans 1997: 151). Caution over the reliability of rental data is an issue that has been recognised by other experts. Prime retail rents in town centres are usually expressed as "zone A" rents. Zone A rents, "generally relate to the rent payable on the first 20 foot depth of the shop unit and can be used to compare rental levels for shop units of varying size." (DOE 1997a: 23) The Royal Institution of Chartered

Surveyors points out that "zone A rents are normally restricted to standard sized shop units and may not represent the overall picture, or the true level of rents after taking into account incentive payments and other inducements" (RICS 1995: 5). There may also be a time lag between rental movements and changing commercial conditions in a town centre over time because shops and offices are typically leased to occupiers for fixed terms subject to rent reviews every five years. Changes in the vitality or viability of a town centre may not necessarily result in a short-term change in the rent of a particular property. The literature suggests that whilst rental information can be used as a measure of the health of a town centre, its value is limited because of the lack of comprehensive data, and the difficulty of accurately analysing such data on a comparable basis.

Some commentators also consider retailer demand for shop units to be an indicator of vitality and viability (Chase 1994; DOE 1994, 1997, 1997a). Information on demand is recorded and published by firms such as Focus, and information on changing representation of multiples in towns is also available (DOE 1994). However, whilst information recording retailers' known requirements does provide an indicator of demand, it does not necessarily accurately reflect *potential* demand from occupiers who may be willing to relocate to or expand within a town in response to new attractions, or better promotion.

The composition of retailer representation is also a factor that can influence the appeal of a particular town centre. For example, "in a historic town the key attractions may be a number of specialist shops, while a good Marks and Spencer is often seen as the test of whether a suburban town is retaining its pull" (DOE 1994: 62). On the other hand in market towns "a trend towards an increased representation of discounters, temporary traders and charity shops can be indicative of a declining centre" (DETR 1998c: 95). The number of multiples in a town does provide an indication of the type of retailer representation in a town, "but it has little meaning for smaller towns and does not reflect either the quality of the retailing or what is happening in the town centre as a whole." (DOE 1994: 57) Analysis of retailer representation, therefore, involves subjective judgement. Furthermore, published data are not available in a form that easily allows comparison of retailer representation of different types and sizes of town centres.

As previously discussed pedestrian flow is a measure of the number and movement of people using town centre streets (DOE 1997a). As such it is "about measuring vitality rather than viability". (DOE 1994: 57) People using the streets may be window shopping or visiting for other reasons (Evans 1997: 152) and, therefore, an increase in use may not lead to a higher level of consumer spending in shops (Colliers Erdman Lewis 1994). Pedestrian flow data "needs to be collected regularly and in a consistent way to provide meaningful information" (DOE 1997b: 56) but "common approaches to measurement have yet to be widely agreed" (Evans 1997: 152). The problem is that often pedestrian flow data is not available or it has not necessarily been collected on a comparable basis over time (DOE 1994: 57). Differences in terms of the time and days on which the surveys are carried out, the prevailing weather conditions and location can influence the survey results.

The proportion of vacant property is clearly an indicator of the health of a town.centre but "any approach which merely totals the amount of vacant space without taking full account of its quality and location will produce a distorted impression." (RICS 1995: 5) CCN Goad Ltd publishes vacancy figures for most town centres which can be compared with national averages. These need to be carefully interpreted as they include "property that is awaiting redevelopment and that which is under construction." (DOE 1994: 62) Comparing vacancy rates for different sized towns can also be misleading. "Small market towns would normally be expected to have a lower vacancy level than larger centres" (DETR 1998c: 95). It is also important "to make allowance for temporary or charity shops and for newly developed space that has not yet been let, as well as for shops that are for sale" (DOE 1997b: 56-57). Properties may also remain occupied because of lease commitments even if they are trading poorly (DOE 1997b). Vacancy rates may also vary in different parts of a town centre, and therefore any analysis should be small area based (DOE 1997b).

Diversity of space in use is a measure of the different uses within a town centre. Data are available from CCN Goad Ltd for retail uses classified into convenience, comparison, service and vacant. However non- retail uses may also be a very important contributor to the vitality and viability of a town centre. " A town is of course more than its shops....In some town centres the number of visitors and hotel occupancy will be important, while in others it might be number of residents, university students, or even the health of the population" (DOE 1997b: 57).

Yields are usually lower in the more viable town centres because investors are prepared to pay higher prices for property due to perceived future gains in income and capital growth. URBED advocate the use of yields as a measure of a town centre's viability, because they indicate how attractive a town is to investors (DOE 1994). Data on yields must, however, be carefully analysed to avoid spurious comparisons between towns, or over time. Chase (1994) draws attention to technical difficulties in using yields as a main indicator because they have different meanings and usage. The different types of commercial yields (initial, reversionary, equivalent, equated) are all calculated differently, and can vary over time as market circumstances change. Chase regards these difficulties as sufficient to relegate the use of yields to a support measurement because other indicators are likely to have greater accuracy and utility. The Royal Institution of Chartered Surveyors (RICS) (1995) formally reaffirmed this in their response to the then draft PPG6 (Oct 1995). They said: "[Yields]...should not... be regarded as a main indicator in assessing a town centre's viability, stability and growth potential but, when correctly analysed, can be useful in support of other forms of measurement" (RICS 1995: 4). Further limitations are identified by Evans (1997), who noted that yields can also be influenced by "differences in rents, town size, and volume of recent development" (Evans 1997: 151). The influence of town size was recognised by URBED who "standardised" yields to reflect town size when comparing centres (DOE 1994). Whilst yields can be relevant to an exploration of a town centre's viability the literature has identified some differences of opinion regarding the extent to which yields should be regarded as a main indicator.

Evans (1997) provides a useful summary of the problems of accurately measuring a town centre's vitality and viability:

> "Lack of data is a key problem. Turnover data is no longer available, for example, since the government ceased to carry out a Census of Distribution after 1971. Much available information is heavily biased towards retailing reflecting traditional understanding of town centres' primary role. User surveys, when they are carried out at all, tend to focus on the shopping experience, and even then have sometimes failed to reach a crucial segment of the market – those who for one reason or another no longer visit the centre but need to be wooed back. Many surveys also rely on professional perceptions of a town's quality rather than the views of users and potential users. For these reasons town centres' social functions remain much under analysed" (Evans 1997: 152-153).

Surveys of town centre managers have also shown that the use of "key performance indicators (KPI)" is also be-devilled by practical problems:

> "KPI are widely supported in the field of TCM [Town centre management] by sponsoring stakeholders and town centre managers alike. However, the managers' comments have demonstrated that the methods of collecting and analysing data for KPIs are still riddled with problems including: uncertainties of what is required, difficulties in obtaining accurate data, time consumption, and expense" (Hogg and Medway 2000: 49).

The lack of time-based analysis has also been perceived as a shortcoming in many assessments of vitality and viability (DETR 1998c: 95), although this has been addressed at the "micro level" in a recent study of Reading town centre (Ravenscroft 2000).

A number of indicators have been proposed as measures of the vitality and viability of town centres. Published data are available for certain indicators for most towns in the UK, but the data must be carefully interpreted to ensure that it is of value for comparable analysis. The use of published data alone is unlikely to provide a sufficiently comprehensive picture of the health of a town centre and data from specialist surveys is therefore required to supplement published data. The use of residents' and trader surveys could be a very valuable means of obtaining such supplementary data for town centres. Residents' surveys can provide data on customer views, including perceptions of environmental quality, accessibility, and safety, and capture the views of those who use the town as well as those who " no longer visit the centre but need to be wooed back" (Evans 1997: 153). Trader surveys can provide data on sales trends, employment and investment. The merit of the use of residents' and trader surveys for this research is discussed further in chapter 3.

The evaluation of the impact of physical public realm improvements on the commercial performance of town centres

As this thesis explores the impact of environmental improvements on town centre regeneration, the literature has been reviewed for evidence of any link between public realm improvements and the commercial performance of town centres. Several authors suggest that there is such a link (CABE 2001; Dickins and Ford 1996; Evans, 1997; Hass-Klau 1993; Sandahl and Lindh 1995). The "theory" is that a better environment attracts more people, improves trade, and helps stimulate new investment; it contributes to an enhancement of vitality and viability. A typical example is Loxton (1995)'s claim of the widely beneficial impact of urban space improvements in Birmingham city centre:

> "Greater numbers of people have been encouraged to use newly created spaces, levels of vandalism have been reduced, shop-keepers have reported improved levels of trading, the city centre has become a safer place to visit, and consequently there is much greater use of the city centre streets during the day and evenings" (Loxton 1995: 48).

Robertson (1993), reviewing USA experience, refers to similar economic benefits:

> "... quality public spaces that are pedestrian friendly will entice more people to come down town more often and to stay longer once they are there; the longer people stay, the more money they will spend" (Robertson K A 1993: 278)

There has, however, been little research to date "to quantify the level of impact that well planned and managed urban spaces have had on the vitality and viability of town centres" (DOE 1997a: 23); nor of the impact of pedestrianisation on turnover in the UK (Hass-Klau 1993). This section of the chapter explores the literature to review what evidence there is concerning the impact of physical public realm improvements on the commercial performance of town centres. It particularly looks at the impact on public satisfaction, private investment, pedestrian flows, rental levels and turnover or trade. It also explores the relative importance of public realm improvements compared with other revitalisation initiatives in town centres. The review demonstrates the limitations of the research in addressing these issues because of the difficulty of distinguishing between the impacts of environmental improvements to buildings or the street scene, pedestrianisation involving the removal or partial removal of traffic, and town centre management. This difficulty is further complicated by the fact that pedestrianisation schemes often involve environmental improvements, and that town centre management schemes often involve the implementation of environmental improvement and pedestrianisation projects as well as organisation, planning, liaison and promotional activity. There is also the difficulty of isolating the effects of pedestrianisation projects from a range of "external" factors such as "trends in the national and local economies" or "population density" (Hass-Klau 1993: 21). Where possible, therefore, the literature review attempts to distinguish between impacts that may have been the result of environmental improvements, pedestrianisation, or town centre management.

Public satisfaction with public realm improvements

Several authors have referred to evidence from surveys on the levels of public satisfaction with public realm improvements. Generally the improvements are well received.

<u>Environmental schemes</u>

In 1988 the DOE sponsored a comprehensive "evaluation of shopping centre improvement schemes in the West Midlands" (DOE 1988: 1). The evaluation looked at sixteen inner city centres. Thirteen were improved mainly through enveloping schemes aimed at improving the external appearance of shops. These were, therefore, essentially environmental improvement schemes. Three were unimproved centres that acted as "controls" for the analysis. Public satisfaction of the amenity of the improved centres was generally higher than in the unimproved centres:

> "The balance of opinions amongst consumers was…that most of the centres where improvement schemes had taken place were better places to shop than they had been three or four years previously. This view was in marked contrast to that of the control centres which were widely perceived to have declined" (DOE 1988: 32).

<u>Environmental/or pedestrian schemes</u>

Loxton (1995) referring to public attitudes to "a number of large scale urban improvement schemes to enhance the quality and image of ..[Birmingham].. city centre" states, "The citizens of Birmingham have been very positive in the main about the city centre improvements and greatly appreciative of the many works of art woven into the schemes" (Loxton 1995: 48). A similarly positive picture emerged from research on the impact of "urban space schemes" in the UK. The findings were based on a literature review of "successful urban spaces," a survey of local authorities, and "case study appraisals of 20 successful schemes across the country." The authors suggest that urban space schemes typically achieve high levels of public satisfaction:

> "User surveys conducted in nine of the case study towns indicated that public satisfaction with enhancement schemes was extremely high. Satisfaction amongst respondents ranged from 70-90% of all users interviewed" (DOE 1997a: 15).

<u>Pedestrian schemes</u>

The same authors (DOE 1997a) also referred to an appraisal of five pedestrianisation schemes by the Highlands Regional Council, and stated, "In general the majority of traders were positive about pedestrianisation schemes. Public satisfaction was even greater" (DOE 1997a: 21). A comprehensive "before" and "after" study of the impact of pedestrianisation in Hemel Hemstead, showed an increase in the proportion of shoppers surveyed that were satisfied with a number of aspects, including pedestrianisation. For example, in 1992, 62% of shoppers ranked "pedestrianising the shopping area" a score in the 7-10 range (10 being the maximun) compared with 78% in 1995 after the completion of the pedestrianisation scheme (Donaldsons 1996: para 7.15, Table 4).

These findings support the view that members of the public often welcome the environmental improvement, or pedestrianisation, of their town centres. Indeed, unless the changes are poorly designed, or controversial, or thought to represent a waste of public money, then this positive attitude would be expected as the users benefit from a more pleasant environment.

However, the disruption caused by pedestrian schemes whilst they are under construction can often be very unpopular, especially with retailers (DOE 1997a; Hass-Klau 1993; Lockwood 1997b). This initial negative response is so widespread that Hass-Klau (1993) has commented that, "It seems to be a law of nature that retailers will resist the implementation of pedestrianisation and traffic calming..[though].. once a scheme has been put in place, traders are often the main people to voice a desire to extend its boundaries or period of operation" (Hass-Klau 1993: 30). This suggests that dissatisfaction due to disruption may be relatively short lived.

Public realm improvements and private investment

One reason why the public sector enhances the public realm is to attract private investment in a range of associated town centre developments. Indeed, the "leverage" of private sector investment has frequently been adopted as a measure of the effectiveness of public sector investment (for example, English Heritage 1999). The literature includes a number of claims of a link between an improved public realm and private investment.

<u>Environmental schemes</u>

The authors of the West Midlands study (DOE 1988) discussed in the previous section concluded that the changes, which were essentially environmental improvements, did play a role in stimulating investment, especially in the larger centres, but that shopkeeper confidence to invest waned with the passage of time:

> ".. physical improvements in the larger centres is important for the short-term protection of shopping opportunities but not sufficient to safeguard the future of the centres in the longer term" (DOE 1988: 77).

The authors also noted that the impact of the improvements was different in the smaller centres where profits were low, often because the centres had too many shops (DOE

1988). Environmental improvement schemes such as enveloping schemes usually involve "direct" grant aid to property owners matched by private sector contributions from the owners. In such circumstances there will always be associated private investment where there is take-up of grant. However, longer-term re-investment may not be sustained if the underlying health of the centre is not improved.

The relatively limited impact of amenity improvements and the relevance of the underlying health of the economy of improved areas on attracting private investment were also highlighted in a DOE sponsored research study (DOE 1995). The study explored the impact of environmental improvements on private investment based on 30 UK case studies of commercial, leisure, mixed use, residential and retail projects. In some cases, the improvement works involved ground preparation, or changes to site access as well as changes to the amenity. The authors found that the impact of the improvements was "substantially influenced by economic and market conditions" (DOE 1995: 99). They concluded that "amenity improvements can reinforce investment decisions..[but]..are not sufficient in themselves without the satisfactory resolution of underlying economic demand and removal of physical development constraints" (DOE 1995: 102). This suggests that environmental improvements of a primarily visual nature may not greatly influence the attraction of private investment, especially in an area of weak market demand.

The claim of a positive link between the improvement of the environment and the attraction of private investment is nevertheless widespread in the practitioner literature. For example, the Scottish Office reported that, "The East Kilbride Village Project demonstrates how public investment in the built environment can act as a catalyst to attract private investment into commercial areas". The claim was based on the fact that two shopping schemes comprising some £2.5m investment in total were developed following streetscape improvements, though little evidence of a causal link was presented (Scottish Executive 1999: 22). Finally, a study sponsored by English Heritage, based on data from 31 conservation area case studies, claimed that "£10,000 of English Heritage investment" levered "£48,000 match funding from private sector and public sources" (English Heritage 1999: 7).

Environmental/or pedestrian schemes

Other authors (DOE 1997a) have claimed that urban space improvements can stimulate a wide range of "indirect" benefits, including the attraction of private investment:

> "Urban space improvements can have indirect benefits, by raising the quality of the environment and improving civic pride significantly within a town centre. The implementation of a scheme can also help to stimulate investment activities including:
> - major town centre developments;
> - renovation and redevelopments;
> - redecoration or renewal of shop frontages; and
> - major shop re-fits" (DOE 1997a: 28).

The authors cited several urban space schemes in Ilford, Solihull, Coventry, Aberdeen and Cardiff that, they claimed, had acted as catalysts in encouraging private investment. For example, in Ilford a "town relief road and pedestrianisation" helped "secure £125million private investment, including the development of a major new covered shopping centre". In Coventry "urban space improvements" helped encourage private investment in new shopping centres at West Orchard and Cathedral Lanes. In Cardiff "urban space enhancement and careful theming" in a new "café quarter" resulted in £4.5 millon private investment "from an £800,000 investment by the public sector" (DOE 1997a: 28-29). Although the authors claim that the urban space improvements helped stimulate private investment, they did not present evidence to show that the investors thought the improvements had affected their decisions.

There are many other examples in the practitioner literature, where claims of a link between environmental improvement or pedestrianisation and the attraction of private investment are made. Just two further examples are cited here. Authors evaluating the regeneration of Horsham town centre claimed that an investment of £14.8m in pedestrianisation, road and public realm works "generated inward investment of more than "£200 million from the private sector" (DETR 1999: 43). Sheffield city centre is an example where the creation of three new public open areas at a cost of some £11.5m, apparently encouraged housing development. A manager of Glesson Homes, a company that refurbished flats on Peace Gardens, one of the three public spaces said, "The scheme is unquestionably crucial to our operation. The vibrancy and convenience of the revitalised city centre is exactly what our customers are looking for" (quoted in *Planning* 26 November 1999: 6) The Sheffield example is comparatively rare in that some evidence is provided to show that investors are influenced by the improvements to the public realm; in the majority of studies "cause and effect" is assumed, without strong evidence.

Pedestrian schemes

There are also claims in the literature that pedestrianisation schemes encourage private investment. For example, Loxton (1995) argues that, in Norwich, "as a result of the improvements to the streetscapes many local shopkeepers improved the appearance of their shops" (Loxton 1995: 47). Pedestrianisation schemes do not, however, always result in the successful attraction of private investment, as some American experience shows:

> "While...pedestrian malls have generally increased the quality and quantity of downtown open space and have enhanced the human-scale amenities of the area, they have frequently failed to spur retail development in the downtown, the initial planning objective of most malls" (Robertson 1993: 282).

This American experience suggests that the objective of attracting private investment in new retail development as a consequence of pedestrianisation did not succeed, because wider adverse social and economic conditions in the towns and their hinterlands were not being tackled. As Robertson (1993) elaborates, "A pedestrian mall, no matter how well-designed has little chance of succeeding in an already dying downtown with low pedestrian volumes" (Robertson 1993: 282). To some extent this mirrors the experience in the West Midlands, referred to earlier, where continuous private investment, following initial public investment, was not sustained in weak centres where profits were low (DOE 1988).

Environmental improvements or pedestrianisation schemes may well stimulate private investment in certain circumstances, but in others they may be insufficient to make a material impact. One of the weaknesses of much of the practitioner literature is that it seeks to disseminate good practice by researching "successful" schemes, but does not give sufficient emphasis to seeking to learn lessons from, or to understand the reasons why, some schemes are "less successful". The inherent danger with this approach is that the value of using environmental improvements as a tool to stimulate private investment may be exaggerated, or inappropriately applied in circumstances where its impact will be minimal.

Public realm improvements and pedestrian flows

One logical measure of the improvement of the environment of the public realm, including pedestrianisation, is its impact on pedestrian flow.

Environmental/or pedestrian schemes

The major review of "urban space schemes" referred to elsewhere in this chapter identified increased pedestrian flows as a consequence of well-managed urban space schemes. The report referred to evaluations of six towns that reported increased pedestrian flows (DOE 1997a: 39-81) Although this literature claims that pedestrianisation results in increased pedestrian flows, it is not clear whether the vitality of the towns as a whole is generally improved through the schemes, or whether improved areas gain at the expense of unimproved areas (see, for example, Simpson 1988: 60).

Pedestrian schemes

There is a great deal of evidence to suggest that pedestrianisation schemes in major European cities often result in increased pedestrian flows. Hass-Klau (1993) reports evidence of seven German towns where pedestrianisation resulted in increased flows of between 18% and 92% with many towns showing increases in the 20-40% range. She also refers to research in Vienna, Austria where flows in four pedestrianised streets increased by 48% but decreased by 2.6% in non pedestrianised streets in the same 11 year period (Hass-Klau 1993: 22). Her own research showed that in Munchen pedestrian flows increased from 72,000 in 1967 before pedestrianisation to 175,000 in 1978, six years after pedestrianisation was complete; and for Nurnberg from 65,000 in 1971 to 160,000 in 1990, 18 years after pedestrianisation (Hass-Klau 1993: 22). This and other evidence led Hass-Klau to claim that, "It can now be taken as established that a well designed pedestrianisation scheme results in a substantial increase in the number of pedestrians visiting the pedestrianised area" (Hass-Klau 1993: 30).

Robertson (1993) also refers to European evidence that "pedestrianisation results in increased turnover because…pedestrian flows increase by at least 50 per cent" (Robertson 1993: 278). Carley's review of the literature on the impact of pedestrianisation also includes reference to enhanced pedestrian flows in German and UK towns drawing of the work of a number of authors including Hass-Klau (Carley 1996).

Pedestrianisation does not, however, always result in increased pedestrian flows. In the UK, a study of Hemel Hemstead found that pedestrian flows had fallen after pedestrianisation partly "due to external factors" and this was causing concern to retailers (Donaldsons 1996). "The problems of using pedestrianisation as a universal cure-all in town centres can [also] be observed in the USA where "dead zones" or no-go areas are common in CBD cores" (The Planning Exchange, 1995). As a consequence, some American pedestrianisation schemes are being abandoned because of their perceived failure (Robertson 1993). We do not know enough about why some pedestrianisation schemes increase footfall and others do not.

Pedestrian flows and rents

Higher pedestrian flows are not necessarily associated with higher rents. In Scotland, Donaldsons carried out health check evaluations of seven historic towns, and noted that, " rents for shops do not directly follow with pedestrian flow and appear to be more influenced by retailer demand" (Donaldsons 1997a: 13). This finding, again, implies that the underlying health of the economy is important as a prime influence on the viability of town centres. However, other factors might also be relevant. Perhaps, even when pedestrian flows increase, the change is not always of a scale that feeds through into increased turnover, profitability and the ability of retailers to pay higher rents. It is also possible that rents might have remained unchanged because of the in-built inertia of lease terms. Rents might, also, have fallen if it were not for the increased pedestrian flows.

Pedestrian flows and safety

As well as increasing trade, higher pedestrian flows are thought to reduce peoples' fear for their personal safety by, for example, increasing natural surveillance. Roberts (1997), however, draws an interesting distinction between perception and reality, by claiming that, "It is a sad but uncomfortable fact that it is not known whether mixed development, increased surveillance and pedestrian density do lead to an absolute diminution of crime" (Roberts 1997: 114). If this is true, then once again the limit of our knowledge is exposed. We do not know enough about how effective specific policies are in revitalising town centres. This is a recurring theme in this section of the chapter.

Public realm improvements and rental levels

Another reason for enhancing the public realm is to increase the commercial viability of town centres, which practitioners often assume requires an increase in rental levels or capital values. The evidence from the literature, however, suggests that there is no guarantee of an increase in rental or capital values.

Environmental schemes

The West Midlands study (DOE 1988) that looked at sixteen inner city shopping centres, thirteen of which had been improved largely through enveloping enhancements, compared the values of shops in 1984/5 and 1986/7 for the different centres. As indicated previously, these schemes essentially involved environmental improvements. Rental and capital values had fallen in two centres, remained fairly static in five, and increased about 10-20% in the others. Factors that may have influenced the values in certain cases included riots, increased insurance premiums, and road works. Interestingly, rents and capital values increased in the three "control" towns that were unimproved. Furthermore, " the best of the selected inner city shopping centres were lagging significantly behind [Birmingham and the West Midlands] from an investment point of view," where values went up by 20%. (DOE 1988: 66)

Environmental/or pedestrian schemes

More recent research commissioned by the DOE (1997a) supports the proposition that urban space improvements in the UK have not been associated with dramatically increased rental levels:

> "Evidence from the case study towns suggests that urban space enhancement is unlikely to have a dramatic impact on vacancy levels, yields or rental growth, except in very rundown secondary shopping areas. These measures need to be implemented in conjunction with other improvements in order to uplift significantly the retail property market within a town centre. Furthermore, the impact of urban space enhancement schemes on these measures takes time to be realised. Measuring long term improvements cannot be precise, given that there are a large number of other determining factors..." (DOE 1997a: 27).

This is an interesting finding because the same research argues that "urban space schemes, which are part of a wider package of proposals, can have a measurable impact on trading performance" (DOE 1997a: 30). Some form of link between enhanced trade and property values might be expected, unless that enhanced trade for some reason did not enhance trader profits or their ability to pay higher rents. The difference may relate to a time lag between an increase in trade and an increase in rents, or perhaps an increase in costs (Hass-Klau 1993). Whatever the reasons, the DOE research claims that there is not a strong link between environmental improvements, or pedestrianisation and rental increase.

Pedestrian schemes

Research in the UK in the late 1980s based on a sample of some 400 towns found that prime shops in pedestrianised streets commanded rental levels on average of 45% higher than those in streets open to traffic (Edward Erdman Surveyors 1987). German trade research published in 1979 showed that "rents increased in 110 pedestrian areas, were unchanged in 30, and declined in two" (Hass-Klau 1993: 23). This suggested that pedestrianisation may have had a positive role in raising rental levels. However, some of the early German research suggesting pedestrianisation results in increased rents of some 20% was criticised by Colliers Erdman Lewis (1994) on the grounds that it was "not benchmarked against changes in the same indicators at a wider level...or against changes for other types of prime pitch" (Colliers Erdman Lewis 1994: 6). To address this criticism Colliers Erdman Lewis compared rental growth for pedestrianised and vehicular streets. Based on a data base of rental information for 431 towns they found between May 1987 and May 1994, prime rents in pedestrianised streets and vehicular streets rose on average by 4.0% pa and 4.1% pa respectively, compared with 6.7% for shopping centres. The "pedestrian streets ... achieved, on average, rates of prime rental growth no better than those found in vehicular streets". Their view was that:

> "the retailers must in general trade no more profitably in prime pedestrianised streets than prime vehicular streets, since if they did it is likely that rental values would have risen faster in pedestrianised areas" (Colliers Erdman Lewis 1994: 13).

This led the consultants to question the economic benefits of pedstrianisation in the UK. Some commentators have questioned aspects of the methodology of this research, for example, the reliance of "few transactions" "to generalise on rents", but they concur that, "The case for pedestrianised streets improving rental performance remains to be proved" (The Planning Exchange, 1995).

In a follow up study Colliers Erdman Lewis considered the impact of pedestrianisation on prime retail rental performance for 19 UK town centres (Colliers Erdman Lewis, 1995). During the two years before pedestrianisation the analysis revealed that 10 centres out-performed the average UK rent, whilst 9 locations underperformed it. On average the centres out performed those for the UK as a whole by 0.6%. In the three years post pedestrianisation, 10 of the 19 centres under-performed the average UK rent and 9 out-performed it, producing an average rental performance of just 0.02% per annum above that for UK as a whole. Colliers Erdman Lewis (1995), therefore, "remain sceptical as to whether a good and improved physical shopping environment derived from pedestrianisation automatically produces a good and improved economic environment" (Colliers Erdman Lewis 1995: 9). Colliers Erdman Lewis legitimately point out that "automatic" economic benefits do not appear to flow from pedestrianisation schemes, as a majority of the schemes studied underperformed the UK rental growth average. However, their own data shows that the rental performance of pedestrianised streets varies considerably in different towns, nearly half of the towns (9 or 47%) appearing to benefit economically. As others have pointed out, "Vehicle restricted areas will work in some towns and not in others. What works will depend on how the scheme is received, consultation and partnership approaches will facilitate success" (The Planning Exchange, 1995: 4). Pedestrianisation does not, therefore, automatically produce economic benefits, but in some circumstances it may do so.

Donaldsons (1996) study of the pedestrianisation of the Marlowes in Hemel Hemstead provides further insight into the effect of pedestrianisation on rental levels. The prime zone A rent on the Marlowes was assessed as £56 per sq ft in 1995 after the pedestrian scheme was completed compared with £80/70 per sq ft before pedestrianisation in 1992, a decrease of 20-30%. This compared with decreases of 10% (£135 Zone A 1995, £150 Zone A 1992) in the Harlequin Centre in Watford, a location without pedestrianisation selected as a "control" town; and 26% (£55 Zone A ground floor 1995, £75 Zone A 1992) in Welwyn Garden City, the other location chosen as a "control town". Despite the fall in rental levels Donaldsons claim the pedestrianisation had a positive impact because "there would have been a more marked impact on the town's rents and yields had pedestrianisation not been carried out" (Donaldsons 1996: para 3.13).

Overall, the UK rental data analysis is limited, and we do not sufficiently understand the reasons why rents apparently increase as a consequence of the improvements or pedestrianisation in some circumstances, and not in others. The design of the scheme may be a relevant factor. The state of the economy of the particular town or region, and the strength of its property market may be another. Perhaps such schemes are more able to enhance rents where they can strengthen, or unlock latent demand for property, or where they are implemented alongside other initiatives that can increase property demand. Our knowledge in this area is very limited.

Public realm improvements and turnover and trade

A number of studies claim that environmental improvements or pedestrianisation can improve or stabilise trade.

Environmental schemes

The West Midlands study (DOE 1988) provides some evidence of the effect of environmental improvements on trading conditions in certain inner city shopping centres. The authors suggest that the improvements may have helped stabilise trade. In 1984 "57% of shopkeepers thought that their centres had become a worse place to trade over the previous three to four years – by late 1986 it was 49%." (DOE 1988: 58) There was also some evidence that turnover was generally higher in shops that had been improved compared with unimproved shops, and that median turnover increases were evident in some improved shops but not in the unimproved shops (DOE 1988).

Environmental/ or pedestrian schemes

The DOE (1997a) sponsored research on the impact of urban space enhancements, which included 20 case study evaluations, also claims that such enhancements can typically assist traders to achieve a better trading performance:

> "There is strong empirical evidence to suggest that urban space schemes, which are part of a wider package of proposals, can have a measurable impact on trading performance. Analysis of pedestrian flowcounts, business surveys or car park usage data indicates that trading performance can, typically, be improved by up to 15%, although greater increases can be achieved within targeted secondary or run down areas" (DOE 1997a: 30).

However, the evidence from the case studies on which this claim is based may not be as strong as is suggested. For example, the evaluations of only three (15%) case studies (Aberdeen, Cardiff, Coventry) referred directly to evidence of increased trade. Only six (30%) evaluations (Bournemouth, Coventry, Darlington, Derby, Ilford, Worcester) referred to increased pedestrian flows. Just two (10%) (Hemel Hemstead, Solihull) referred to increased car park usage. Furthermore, pedestrian flows and car park usage are indicators of vitality and they may not necessarily reflect increased trade. Again, as referred to earlier these towns were chosen as examples of "successful" schemes and the picture might be different elsewhere.

Pedestrian schemes

The literature contains extensive reference to the link between pedestrianisation and increased trade based on studies for towns in Austria, German, North America, Sweden and the UK (Boots 1996; Dickins and Ford 1996; Donaldsons 1996; DOE 1997a; Hass-Klau 1993, 1997; Robertson 1993; Sandahl and Lindh 1995; Simpson 1998). Much of this literature suffers from the short-coming that claimed increases in trade are not "benchmarked" so that it is difficult to judge whether the increases would have occurred without the pedestrianisation (Colliers Erdman Lewis 1994: 6). Some early German research did, however, compare changes inside and outside pedestrian areas, effectively providing such a benchmark. For example, Hass Klau (1993) refers to research by the Research Institute of Berlin in 1978 that compared pedestrianised streets in eleven towns of varying size. Based on 1800 questionnaires, 83% of retailers in pedestrianised areas reported increased turnover compared with 20% outside pedestrianised areas (Hass-Klau 1993: 23). Other German research by a trade association in 1979 found that, "141 pedestrianised areas experienced an increase in turnover (83%), 24 experienced no change (14%), and only five (3%) saw a reduction. In streets outside the pedestrianised areas, 24 [20%] saw an increase, 75 [64%] saw no change and 20 [17%] experienced a decline in turnover" (Hass-Klau 1993: 23). The impact is well summed up by Hass-Klau (1993) based on "over 20 years of experience of extensive pedestrianisation and traffic calming in Germany, and over ten years of rather less ambitious schemes in the UK":

> "There is not usually an immediate large increase in trade, and there may even be a small drop, which can last for about a year; the decline depends on the size of the business, its structure and its location. The economic cycle must also always be taken into account. After the transitional period, retail turnovers may be expected to increase, showing growths which are greater than those in other shopping centres which have not been developed as discussed above" (Hass-Klau 1993: 30).

The evidence in the UK of the link between pedestrianisation and increased trade is "less conclusive" than that from Germany (Hass-Klau 1993: 28). Furthermore, the research by Colliers Erdman Lewis has even led supporters of the concept of pedestrianisation to acknowledge that "the jury is out on the economic benefits of street closure to vehicles"

(Dickins and Ford 1996: 93). It should, however, be remembered that the Colliers Erdman Lewis research was based on an analysis of rents, not turnover. Despite this, because of an assumed link between rents and turnover, that research has challenged the conventional wisdom that pedestrianisation typically increases trade in the UK.

Town centre management

Studies are normally hampered by lack of turnover data. This problem was addressed by Lockwood (1996) who carried out a survey of the takings of 323 high street stores in 46 towns throughout the UK between 1990 and 1995 with retailer co-operation. 17 of the towns operated town centre management schemes; the others did not operate such schemes and were selected as "control" towns. Typically the town centre management schemes involved "improving the environment and streetscape, pedestrianisation and ...promotional activities". The findings were that trading conditions were difficult, with considerable regional variation in store performance:

> "Over 60% of stores in the total sample failed to record sales growth above the rate of inflation during the period between 1990 and 1995 and actual takings in almost ¼ of stores were less than in 1990/91" (Lockwood 1996: 2).

Lockwood also claimed that, "the findings provide firm evidence that retail performance is likely to be better in towns where local authorities and businesses have set up schemes to manage and promote the town centres" (Lockwood 1996: 2). For example:

> " Boots and M&S store managers said that trading conditions would have been significantly worse in more than 2/3 of the TCM ["Town centre management"] towns if a management scheme had not been created" (Lockwood 1996: 2).

> "Stores in 8 out of 14 TCM centres performed moderately or significantly better than those in neighbouring control towns" (Lockwood 1996: 2).

> "71% of stores in towns with an effective TCM scheme achieved higher takings than stores in the control towns" (Lockwood 1996: 2).

However, despite the claim that the benefits to trade were the result of the town centre management, it is possible they may have been stimulated by physical works such as environmental improvements, or pedestrianisation schemes as much as by "management intervention". Again, the limits of our knowledge are exposed.

The impact of public realm improvements compared with other retail regeneration activity

There is limited evidence in the literature of a widespread comprehensive approach to the evaluation of the success of the application of UK models of regeneration referred to earlier, usually involving a combination of improvements to attractions, accessibility, amenity and management. Some insight into the success of regeneration action can, however, be inferred from UK studies of the impact of regional shopping centres on nearby towns. For example, Evans (1997) suggests the towns that have taken regeneration action have been better able to survive the competition:

> "Studies of such..[regional]...centres' impact on existing retail town centres have consistently revealed that the condition, status and proximity of the latter has crucially affected the volume of diverted trade. The centres that have suffered most, notably Dudley and Sheffield, tended to have poor pedestrian environments and car parking and congestion problems. The least affected centres have been actively managed. They all possess an attractive retail environment, a good range of facilities and have the will and the means to remedy weakness and build on strengths" (Evans 1997: 29).

The inference from these studies is that a "poor pedestrian environment" has been a contributory factor that has hampered revitalisation, whereas an "attractive retail environment" has helped. But other factors have been influential including attractions ("good range of facilities"), accessibility ("car parking and congestion problems"), and active management. Some limited evidence of what is known about the relative importance of these various factors is reviewed below.

Evans (1997) refers to a survey of 1500 residents in the Merry Hill catchment area who were asked for "their views on existing town centres". "By far the most common response, mentioned by 42 per cent of the sample was the desire for an improved range of shops and retailers including the reinstatement of some who had left, followed by the need for better or free car parking (25 per cent), environmental improvements (10 per cent) and better facilities (5 per cent)" (Evans 1997: 30). Elsewhere Evans (1997) refers to consumer research which showed that "..cleanliness, pleasant environment and convenience from home matter most to the majority of shoppers" (Courtney Research and Property Market Analysis, 1990 quoted in Evans 1997: 30). This limited UK evidence suggests that environmental improvements may, therefore, assist the revitalisation of town centres where they suffer from competition from other retail centres, but other factors such as attractions and accessibility may be more important.

Research by Page and Hardyman (1996), based on a survey of 69 Town Centre Management schemes (52 responses) in the UK in 1994, also provides some insight into the perceived importance of the environment as a "marketing strength" or a "weakness in the town centre product" compared with other factors. The researchers drew a distinction between "tourist" and "non-tourist towns". In terms of perceived strengths for tourist towns they found an "emphasis….on the environment, heritage and retailing, with leisure shopping an important activity". "In contrast, a number of the non-tourist towns felt that access was a major strength….and also scored retailing as a major activity" (Page and Hardyman 1996: 158-159). In terms of perceived weaknesses, "parking, the range and quality of shops, and the apparent neglect of the town centre, as well as the image of the town, featured prominently" (Page and Hardyman 1996: 159). The image and environment of the town centre was especially perceived as a weakness in non-tourist towns. 26 (78.8%) responses identified those factors as a weakness in the town's product in non-tourist towns compared with 6 (31.6%) in tourist towns" (Page and Hardyman 1996: 159, Table 6). The implication from this research is that policies aimed at improving the environment of a town centre as a pre-requisite to enhance its vitality through "place marketing", will be necessary in the majority of non-tourist towns in the UK. Such policies are likely to be less of a priority in tourist towns, many already having a decent environment, compared with those seeking to improve attractions such as shopping facilities and accessibility such as parking.

Research in Ystalyfera, a small town in South Wales, explored residents' reasons for choosing where they shopped for groceries. Over 90 % of residents thought good quality shops, service and reasonable prices were important or very important factors determining choice of centre. This compared with the availability of a supermarket/superstore (78%), an attractive shopping environment (71%), a convenient car journey (71%) and good car parking (70%). Though not paramount, the attractiveness of the environment was a relatively important factor that the residents claimed they took into account in deciding where they would shop for groceries (Thomas and Bromley 1995: 441).

Robertson (1999) provides further insight on perceived "successful" revitalisation activities for small city down towns in the USA. In the survey of planning departments for 57 small cities in 1995 "pedestrianisation improvements" were ranked fifth most successful out of sixteen, behind main street approach, new office development, waterfront development, and convention centres. Typically, the pedestrian improvements involved "streetscape improvements (e.g. flowers, trees, benches, human scaled lights, attractive pavement, banners) to soften the down town environment and encourage people to linger", not the removal of traffic from streets (Robertson 1999: 276). "Centralised retail management" ranked tenth most successful, behind sports stadium/arena, historic preservation and parking facilities/tourism, and the other initiatives referred to above. "Pedestrian mall", usually involving the removal of traffic, was perceived of as being the least successful strategy, behind down town housing, transit improvements, indoor shopping centre, traffic circulation changes, and nightlife/entertainment and the other initiatives referred to above. Though the findings are based on general perceptions of city planning officials, and not detailed evaluations of retailer or consumer perspectives, they do reinforce some of the doubts expressed in the UK literature about the effectiveness of pedestrianisation schemes in revitalising town centres.

It is also interesting that the "main street approach" was considered more successful than "centralised retail management". Whilst the author does not draw a clear distinction, perhaps the reason is that the main street approach is broader, involving far more than a focus on retail issues. The evidence from this survey does imply that environmental improvements can be a relatively successful means of revitalising small USA downtown centres. However, improving attractions, especially those that "create a sense of place" were regarded as more important. Factors affecting accessibility such as "transit improvements" and "traffic circulation changes" were considered less significant, perhaps because the car is generally better catered for in America. Interestingly, many of the initiatives championed in the UK to enhance vitality and viability within town centres such as "housing", "indoor shopping centre", and "nightlife/entertainment" were not ranked highly in terms of their success in this USA survey.

Sandahl and Lindh (1995), drawing on research of improved Swedish town centres, claimed that Jonkoping East, the most successfully improved town, benefited mainly because of changes to "pedestrianisation and improved accessibility" (mainly bus routes). These two factors were judged to have been the subject of extensive improvement, but there were also improvements in town centre management and, to a lesser degree, to buildings and streets. Because of the correlation between the improvements in the Swedish towns studied, and the impact on the indicators of town centre health chosen, the authors concluded, there is "strong evidence for the positive effect of improving the attraction of a town centre" (Sandahl and Lindh 1995: 56).

From the limited evidence in the literature, it is not possible to draw sound conclusions on the relative importance of public realm improvements, compared with other factors, in improving the economic health of town centres. Much probably depends on the strengths and weaknesses of the particular town centre, and its cultural context, which will vary for different countries. However, a view is emerging that the popularity, economic success, and sustainability of our towns and cities will depend, to a degree, on the quality of the urban spaces in our towns. Tomalin (1998) puts it this way:

> "The importance of urban spaces in town centres should not be under-estimated. Historically often unwanted and unloved, these areas are crucial to visitor's enjoyment of town centres. As leisure shopping increases, it will be towns with interesting, well managed public areas which will attract the crowds. The

welcomed priority given to pedestrians in recent years, underlines the importance of urban spaces and this surge of interest looks set to continue into the millennium, fuelled by environmental concerns and sustainability issues. Town centres need to be treated holistically if they are to thrive and public open spaces are an integral part of the whole offer" (Tomalin 1998: 41).

Overview of the impact of public realm improvements on the commercial performance of town centres

In relation to the impact of public realm improvements on the commercial performance of town centres, the evidence from the literature is limited and imprecise, and is summarised in Table 2.6 overleaf. There is some evidence to suggest that public realm improvements can stimulate improvements to the economic performance of towns, measured in terms of associated increases of private investment, pedestrian flows, and turnover or trade. In smaller less accessible centres that are "over-shopped" the effectiveness of environmental improvements in sustaining private investment has been questioned. The impact of public realm improvements in enhancing rental levels is also in doubt. In some cases, even in towns with declining trade, store managers have perceived "town centre management" as being of benefit, mitigating circumstances that would otherwise have been worse.

Much of the evaluation work relates to pedestrian schemes, which typically involve the removal of traffic as well as "cosmetic" enhancements to the public realm, sometimes as part of a wider package of initiatives, including management. The literature suggests that the economic performance of towns is most effectively enhanced when amenity improvements are combined with other initiatives and town centre management (DOE 1988; Colliers Erdman Lewis 1994). This implies that "cosmetic" enhancements alone may have a limited impact on economic performance, especially where the underlying health of a town centre is poor. Without such underlying health, environmental improvements can be of little value, like putting "cosmetics on a corpse" (DOE 1994: 37).

Table 2.6

Summary of literature review claims of the impact of regeneration activity on town centres

Impact	Literature review of claims of revitalisation on town centres			
	Environmental schemes	Environmental / or pedestrian schemes	Pedestrian schemes	Town centre management
Public satisfaction	Limited UK evidence of positive impact	Limited UK evidence of positive impact	Limited UK evidence of positive impact	Not known
Private investment	Limited UK evidence of positive impact, but doubts of sustainability of impact in weaker market areas	UK evidence of positive link	Limited UK evidence of positive impact. Limited USA evidence of negative impact	Not known
Pedestrian flows	Not known	UK evidence of positive impact	Extensive European evidence of positive impact. Limited UK and USA evidence of negative impact	Not known
Rental levels	Limited UK evidence suggests no positive impact	UK evidence suggests no positive impact.	UK evidence suggests impact may be positive or negative depending on scheme	Not known
Turnover or trade	Limited UK evidence of positive impact	UK evidence of positive impact	Extensive European and USA evidence of positive impact; less conclusive in the UK	Limited evidence suggests positive impact

Conclusions

Many town centres in the UK and the USA are in decline. Such decline has given rise to an array of environmental, social and economic problems, and in the UK a shift in government policy to encourage new investment within town centres, as well as initiatives to regenerate declining town centres. A significant number of towns in the UK have taken steps to enhance their vitality and viability through a combination of action usually involving new management initiatives, public capital investment in a variety of improvements, or attracting new private investment. Many of these initiatives have been championed as examples of "best practice", but research into the effectiveness of regeneration action on achieving regeneration outcomes is in its infancy. Furthermore, such research is beset by problems such as the lack of a consistent approach to evaluation in case studies, the lack of data and the difficulty of its interpretation, particularly the difficulty of establishing "cause and effect" given the complex array of influences that affect the health of town centres. Many practitioners, therefore, apply models of town centre regeneration with limited knowledge of their likely outcome, comforted by the fact that it is "conventional wisdom" to do so. In a sense, they sometimes act in "blind faith", unsure that the hoped for revitalisation will flow from the initiatives they have taken. This state of knowledge, or rather lack of it, is not uncommon in the field of urban policy (Hambleton and Thomas 1995). Similar arguments were advanced by Edwards (1995) who reviewed evaluation studies into the social impact of mainstream urban policy initiatives, and thought that they contributed "little to an understanding of whether and how and why some programmes work and others do not" (Edwards 1995: 711). A more recent review of "area based initiatives" involving regeneration also found that there is "a paucity of evidence which indicates "what works, and why?" " (DETR 2001: 15). It is, therefore, important to continue to gain a better understanding of how best to revitalise town centres, given their value to society, so that future outcomes from policy initiates and investment can be predicted with more certainty. The Llanelli research aims to assist this better understanding. The next chapter describes Llanelli's decline in the late twentieth century and the steps that were taken by the public sector to revitalize the economy of the town centre and its hinterland.

Chapter 3

Llanelli's late twentieth century decline and the planning responses

Introduction

A primary objective of the research is to explore the impact of changes to the environment of Llanelli town centre post 1992. As context for this exploration it is helpful to review the characteristics of the economy of Llanelli in the early 1990s when the changes to the town centre environment began, as well as changes to the economy through the period to 1997 when the questionnaire surveys were completed. It is also helpful to explore the nature and timing of the public sector investment in the town centre during that period as further context for the study of its impact.

The characteristics of the economy of Llanelli in the early 1990s were very much a product of its industrial history. Llanelli grew rapidly in the early twentieth century because of the coal, steel, tinplate and heavy engineering industries. The population of the town increased from about 11,000 in 1860 to some 30,000 in 1920 (BDP 1990: para 2.8). In the early 1920s the town centre was thriving, with six cinemas and 941 shops (BDP 1990: para 2.13). Llanelli's coastline was also heavily industrialised. The town was so dependent on the metal industries that it "earned the nickname Tinopolis – … the undisputed tinplate capital of the world" (*The Western Mail* 3rd April 2000). During the second half of the twentieth century the economy of the town was weakened because of the contraction of the coal and steel industries. There were massive job losses. The closure of the Duport Steel works in 1980 alone resulted in the loss of 1200 jobs. "An avalanche of other manufacturing and redundancy announcements in the period 1980-83 resulted in the loss of 11,400 jobs" (*Financial Times* May 13th 1988). Unemployment in Llanelli rose from 6% in 1978 to 19% in 1982 (Llanelli Borough Council 1993: para 2.5). Over 1800 acres of land on the coast became derelict as a result of industrial closures. The town centre, which was pedestrianised and redeveloped in phases in the 1970s, was perceived of as being in "crisis" by 1990 (Carmarthenshire County Council/WDAb no date). Unemployment in the Llanelli travel to work area was also relatively high at 10% in July of the same year (Blackaby *et al.* 1994: 27). This suggests that in the early 1990s

Llanelli's economy was relatively weak. Further evidence supporting that proposition is now explored.

Llanelli's economy in the 1990s

In 1991 the population of the district Llanelli was 75,400 (Chesterton 1997: 9). It fell by 2.1% over the period 1981-91, though Chesterton claim there was some growth 1987-1990 (Chesterton 1993: 13-14). Llanelli was the only district in the then county of Dyfed to experience population fall during the 1980s (Touche Ross 1992: 11). The relative loss of population in Llanelli, the most urbanised district, compared with the more rural surrounding areas, a process sometimes referred to as "counter urbanisation", suggests that the economy of the town was relatively weak in the early 1990s. Falling population can also adversely affect the housing market, which, in turn, has implications for an area's prosperity. Blackaby *et al.* (1994) argue, "The health of the housing market and the economy are seen as inextricably linked. Lower house prices generally decrease household wealth which decreases consumer confidence and reduces spending" (Blackaby *et al.* 1994: 9). Average house prices were lower in Dyfed (which included Llanelli) in 1994 than in any other county in Wales, and in most other parts of Britain. For example, in the first quarter of 1994 the average house price in Dyfed was £40,646 compared with £100,231in Greater London (Blackaby *et al.* 1994: 8). Again, relatively low house prices imply a weak economy in the Llanelli area.

Gross Domestic Product (GDP) calculations are often used as an indicator of the prosperity of an area, together with related data on earnings, economic activity rates and unemployment. Between 1989 and 1993 the annual percentage growth in GDP in Dyfed was negative. This mirrored the national pattern where output fell in the worst recession in Britain in the post war era (Chesterton 1997). Furthermore, Dyfed was performing relatively poorly compared with other areas in the UK. In 1989, for example, GDP per head of the population in Dyfed was 77.8% of the UK average, worse than for Wales as a whole where GDP was 85.4% of the UK average (Touche Ross 1992: 15). Again, this suggests the economy of Llanelli was relatively weak in 1992. Low earnings, low activity rates and high unemployment can reduce GDP. There is some evidence that earnings in

Llanelli were probably relatively low in the early 1990s. "With the exception of male manual workers, West Glamorgan [adjacent to Llanelli] is therefore an area of low earnings. The average full-time male in West Glamorgan earns only 87% of the average full-time worker in Great Britain with the corresponding figures for females being only slightly higher at 91%" (April 1993) (Blackaby *et al.* 1994: 6). The data that imply relatively low earnings provides further evidence to suggest the economy of Llanelli in the early 1990s was weak. The relatively poor performance of Llanelli's economy in the early 1990s is also suggested by an analysis of economic activity rates, the percentage of people of working age who are part of the labour force. Economic activity rates in 1991 were lower in Llanelli (male 61.77%; female 39.68%) compared with other districts in industrial South Wales (Ogwr, Neath, Port Talbot, Swansea), Wales (male 67.55%; female 44.78%) and Great Britain (male 73.30%; female 49.86%) (Blackaby *et al.* 1994: 10). Unemployment in Llanelli was also relatively high in 1992 (4,196 or 13.7%) in the Llanelli travel to work area (TTWA) compared with other TTWAs in Great Britain; Llanelli ranked 52 out of 322 TTWAs in Great Britain that year (Touche Ross 1992: 6). Unemployment was also high compared with other areas in South Wales. "Llanelli's unemployment in April 1992 placed it third behind only Aberdare and Merthyr Tydfil and Rhymney among industrial areas in Wales, with higher unemployment than industrial TTWAs with full development status such as Neath and Port Talbot, Pontypridd and Rhondda or Blaenau Gwent and Abergavenny" (Touche Ross 1992: 6). Relatively high unemployment is a further indicator of a weak economy.

Llanelli's economy was also "highly dependent on manufacturing [and]..on a small number of larger firms" (Blackaby *et al.* 1994: 37). Llanelli employed 40% of its employees in production industries in 1989 compared with 27% in Wales and 25% in Great Britain; and 52% in services compared with 66% in Wales and 69% in Great Britain (Touche Ross 1992: 10). "Data on plant size reveal[ed] that Llanelli ha[d] a lower percentage of its workforce employed in firms of less than 25 employees and a higher percentage employed in firms of over 100 employees than in the surrounding TTWAs of Neath and Port Talbot, Swansea and Bridgend" (Blackaby *et al.* 1994: 37-38). Although the strength of the manufacturing base was recognised in the early 1990s as an important source of employment and perceived of as a potential basis for attracting new "supplier" firms, the economy's lack of diversification was acknowledged as a weakness.

Employment growth is also an indicator of economic health. In 1991there were 26,900 employees in employment in the Llanelli TTWA, a decline of 0.3% over the figure for 1987. Llanelli performed worse than neighbouring TTWAs to the east. Over the same period, 1987-91, employment increased in Neath and Port Talbot (2,400 or 7.1%), Swansea (2,200 or 2.6%), and Bridgend (2,200 or 4.7%) (Blackaby *et al.* 1994: 14). This further evidence suggests Llanelli's economy was relatively weak in the early 1990s. Employment growth is affected by new company formation and inward investment. During the period 1981-91 the stock of companies (VAT registered) in Llanelli increased by 15.8%, compared with 18.8% for Wales and 28.7% for Great Britain. "The rate of company starts in [Llanelli in] 1991 was 10.9% lower than it was in 1987, greater than for Wales (-3.2%) and Great Britain (-2.1%) (Blackaby *et al.* 1994: 32-33). The relatively low rate of company formation in the early 1990s suggests a lack of entrepreneurship in the Llanelli economy (Blackaby *et al.* 1994). Whilst the growth of indigenous business is usually important to an area's economy, the attraction of inward investment can also create new employment. "During the 1980s, Wales was particularly successful at attracting inward investment with 20% of all recent foreign investment into Britain coming to Wales" (Blackaby *et al.* 1994: 2). However, Dyfed's share, of this investment (which includes Llanelli) is small. "In 1991, there were 26 overseas owned manufacturing units in Dyfed, employing 4,600 people...With about 12% of the population of Wales, Dyfed's 6.8% share of Welsh jobs in overseas owned units is an indicator of the county's relative lack of success within Wales" (Touche Ross 1992: 18). The lack of inward investment also implies a relatively poorly performing economy, which is partly related to Llanelli's peripheral location.

Llanelli's peripheral location at the western end of the M4 corridor in South West Wales was marked in the early 1990s because a section of the M4 motorway between Baglan and Lonlas, north east of Swansea, remained missing until the mid 1990s. Llanelli also had a relatively poor train service. For example, in 1992 the train journey time from

London to Llanelli (200 miles) was 3.2 hours, with a daily frequency of only 1 train in each direction. This compared very unfavourably with the train journey time from London to Cardiff (155 miles) of 1.8 hours, and a daily frequency of 21 trains in each direction (Touche Ross 1992: 13). The peripherality of Llanelli in the early 1990s probably contributed to its economic difficulties.

The physical and economic decline of Llanelli's former industrial foreshore and its town centre were also symptoms of a weak economy. There was a large scale and concentration of over 1000 acres of derelict land on the coastal belt in Llanelli in the early 1990s. The derelict sites included Burry Port Harbour (60 acres), Carmarthen Bay Power Station (300 acres), Sandy Water Park (120 acres), and South Llanelli (750 acres) (*Financial Times Survey* Friday May 13th, 1988; Llanelli Borough Council 1993: paras 4.6-4.14). As a further indication of relative urban deprivation, Llanelli was ranked 13th out of 37th districts in Wales in terms of assessments for Welsh Office urban aid funding in the early 1990s (Touche Ross 1992: 12).

There was also widespread perception that the town centre was in decline in the early 1990s. The town lost its main foodstore, Tesco, in 1989 when it closed and moved out of town to Trostre Park. A survey carried out by the Property Managers' Association and Debenham Tewson in 1992 "showed Stepney Street, Llanelli as one of the worst town centre shopping areas in Britain in terms of turnover" (quoted in Touche Ross 1992: 19). This was significant because Stepney Street was a prime shopping street in the town centre at that time. The then Llanelli Borough Council considered the absence of a major food outlet, an inadequate range of retail units, and lack of public and private investment were symptoms of decline which could only be addressed by a comprehensive redevelopment of the town's central area (Davies 1993). This view was supported by the Secretary of State for Wales in August 1994 who agreed with an inspector who held a public local inquiry into a Compulsory Purchase Order for a new shopping centre. The inspector concluded, "The economic and commercial decline of the town in recent years, relative to neighbouring rival shopping centres was clearly recognised by witnesses for all the parties" (Welsh Office 1994).

In common with many parts of the UK that had been adversely affected by the UK wide recession, Llanelli, in the early 1990s had a relatively weak economy; worse than many other areas of Wales and the UK. At the end of the Millennium, Llanelli was still a relatively poor area. For example, in 1999 Llanelli was included in the West Wales and the Valleys area that was awarded Objective 1 status because GDP per capita in that area was only 71% of the European average (NEDS 1999:4). Throughout the 1990s, therefore, Llanelli probably remained one of the poorest areas in Wales, the UK, and Europe. Any positive changes in the fortunes of Llanelli town centre during the period of research 1992-97 of Llanelli were, therefore, unlikely to have been caused by a dramatic change in the economy of the town.

The response of the public sector

By 1988 the Borough Council had developed a "three fold strategy" to respond to the area's economic difficulties: the development of industrial estates complimenting others provided by the WDA, the provision of workshops for small businesses, and the clearance of derelict land for new uses (*Financial Times* May 13th 1988). In 1990 the Borough Council joined with the WDA in a £30m regeneration scheme to "reclaim and re-use the former industrial land along the coast" to provide a new high quality environment and sites for "new housing, employment and leisure opportunities" (Carmarthenshire County Council/WDAb no date). The project gained further momentum with the subsequent award of a £14.5m grant from the Millennium Commission to expand the coastal regeneration scheme to create the Millennium Coastal Park along the 20km stretch of coastline (Carmarthenshire County Council/WDAc no date). In 1990 the Council and the WDA also joined forces in a £15m scheme to regenerate the town centre, the details of which are now explored (Carmarthenshire County Council/WDAa no date).

As previously discussed, there was widespread agreement that Llanelli town centre was in decline in the early 1990s. In 1992 the then Llanelli Borough Council and the WDA published proposals to improve the town centre:

> "An exciting new heart for Llanelli will be created in carefully-planned stages as follows:
>
> Environmental improvements to Vaughan Street and Stepney Street.
> Construction of prestigious new office building next to Sunken Gardens.
> Conversion of former Tesco store into premises for a range of new shops....
> Purchase of the remainder of the land required for redevelopment....
> Improvements to the market and multi-storey car park.
> Closure of Murray Street and construction of new southern loop road.
> Construction of a major food store, a wide variety of other shops, cafes and restaurants, all linked by pedestrian ways and served by ample open air car parking" (LDG 1992).

With the exception of improvements to the market and the conversion of the former Tesco store all the proposals were completed by November 1997. In addition improvements to parts of Cowell Street, Lucania Buildings, Stepney Arcade (not part of the 1992 plans), and Stepney Precinct, were completed. A combination of public and private investment was involved. The public investment comprised infrastructure and environmental works, whereas the private investment mainly involved the construction of new buildings.

In the main shopping areas of Vaughan Street and Stepney Street the publicly funded changes involved new paving, canopies, lighting, street furniture, and tree planting (1992-1995) (Plates 1-4). The scheme also incorporated CCTV cameras and the complete re-modelling of the facade to No. 24-26 Stepney Street (1994). Other important shopping areas were also improved; notably Stepney Precinct, Stepney Arcade, and parts of Cowell Street (1996). Changes to Stepney Precinct involved new paving, remodelled walls and windows, and a new glazed roof. The up-grade of Stepney Arcade comprised new paving and repainting. The northern part of Cowell Street was also up-graded with new paving and car parking bays (1996) (Plates 5 & 6). The entrance to Cowell Precinct was remodelled with the inclusion of new canopies and lighting (1996). The facade to the Lucania Buildings and the adjacent former cinema was up-graded with new windows, re-rendering, painting and new shop fronts. As part of a "living over the shops" scheme flats were constructed within the upper floors of the improved Lucania Buildings (1997) (Plates 7 & 8).

Plate 1: View of Stepney Street (West) 1990 showing 1960s canopies

Plate 2: View of Stepney Street (West) 1997 showing new paving, canopies, lighting, and office development

Plate 3: View of Stepney Street (East) early 1990s showing old paving and canopies

Plate 4: View of Stepney Street (East) 1997 showing new paving, canopies, lighting; and up-graded entrance to Stepney Precinct

Plate 5: Cowell Street 1992

Plate 6: Cowell Street 1997 showing new paving and car parking bays

Plate 7: Lucania Buidings 1989

Plate 8: Lucania Buildings 1997 showing up-graded facade

Major publicly funded infrastructure changes were also implemented to facilitate and complement the new St Elli shopping centre. To create space for the centre, part of Murray Street was closed to traffic and a new Southern Loop Road was constructed along Stepney Place, Pottery Street, Upper Robinson Street, Bres Road, and Murray Street. Services, including a fibre optic cable, were diverted. Originally Murray Street was one way with traffic travelling in a west to east direction. The new scheme was opened to two-way traffic in July 1997. The land south of the closed off section of Murray Street was contaminated by a former gas works and other former industrial uses. The site was the subject of an extensive site remediation contract that rendered the site suitable for use as a shopping centre (1996). The 500 space multi-storey car park above the market was structurally strengthened to extend its life, and repainted (1995). A new 150 space ground level car park with footpath links to the St Elli shopping centre was constructed in Stepney Place on land previously used for housing and temporary car park use (1996). A new bus station with seven glazed shelters was constructed adjacent to the Stepney Place car park (1996) (Plates 9 & 10). The main environment improvements implemented during the period 1992-1997 are shown on Fig 1. Outside the town centre two major new strategic roads were completed: the A484 Link Road from Trostre to Loughor Bridge in June 1993, and the Coastal Link Road through South Llanelli in September 1995.

There were two main private investments that involved the construction of new buildings prior to the end of 1997. The first was the construction of a four-storey 1028 sq m. (13,000 sq ft) office development adjacent to the Sunken Gardens in Stepney Street by H&W Developments in 1993 (Plate 11). The second was the construction of the St Elli shopping centre by Redrow Commercial, funded by Sun Life, and opened in November 1997. This comprised a 12,000 sq m. (130,000 sq ft) modern covered shopping centre anchored by ASDA, JJB Sports and Argos, 23 unit shops and 450 car spaces (Plates 12 & 13). The centre was closely integrated into the rest of the town centre. The indoor market, Co-op Living Store, and Stepney Precinct all front onto the main covered mall. The centre is adjacent to the Stepney Place car park, the multi-storey car park, the bus station, and close to the established prime shopping area that is situated within Vaughan Street and Stepney Street. The major developments implemented during the period 1992-1997 are shown on Fig 2.

Plate 9: Car parking area north of Stepney Place 1992

Plate 10: New bus bays north of Stepney Place 1997

Plate 11: New offices viewed from Cowell Street 1997

Plate 12: Remediation of the former gas works site

Plate 13: View of ASDA on former gas works site 1997

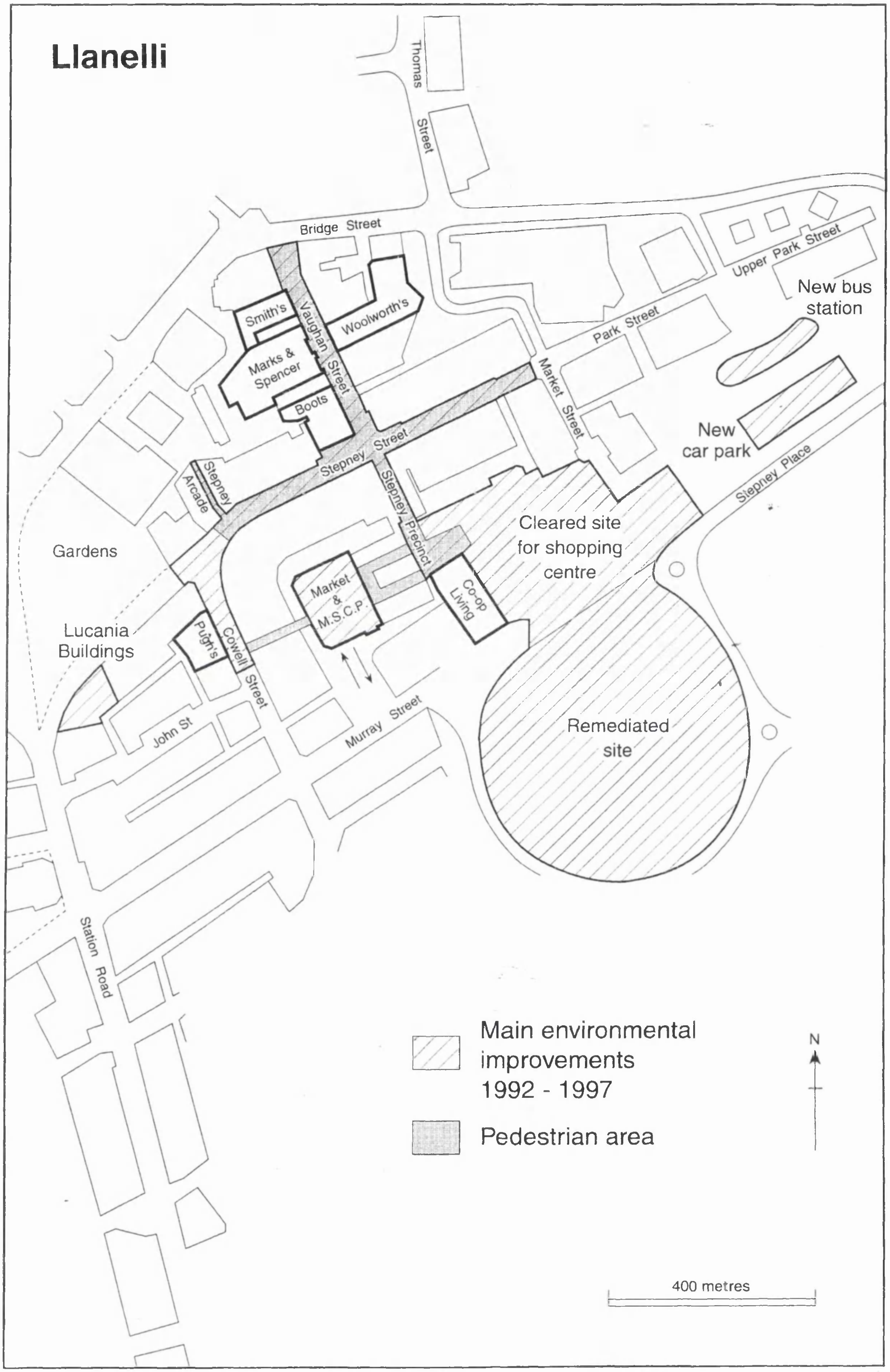

Fig 1: Main environmental improvements 1992-1997

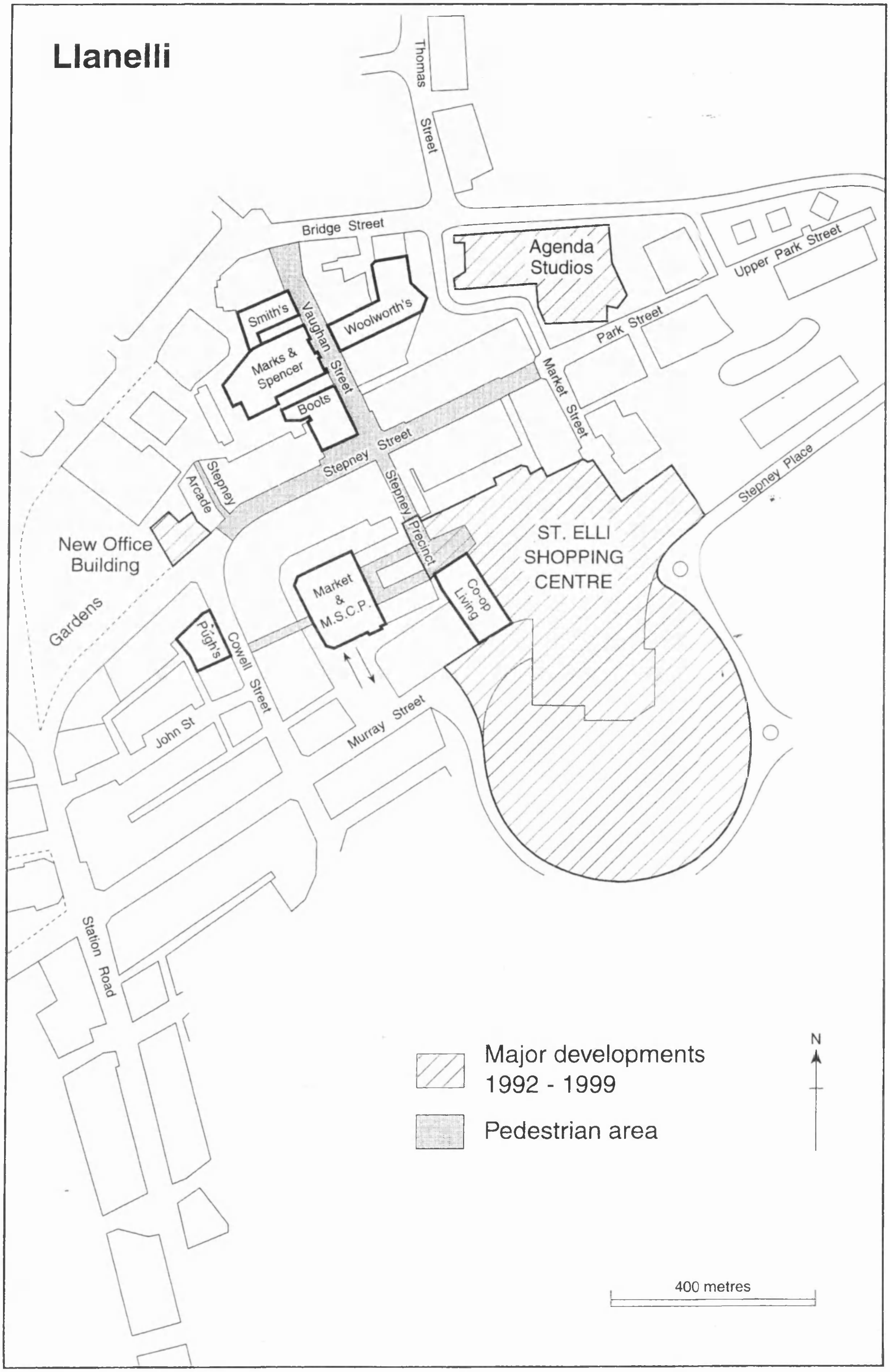

Fig 2: Major developments 1992-1999

There were also some other major private investments utilising existing buildings that had been improved with public finance. Firstly, there was the attraction of Etam to the refurbished No 24-26 Stepney Street in 1994 after it was vacated by Poundstretcher. Secondly, there was the attraction of a £1m investment by Wetherspoon to the old cinema in Stepney Street in 1998, a building whose external appearance had been improved together with the adjacent Lucania Buildings by public funding. The promoters of this development confirmed that the "new look centre" was influential in their decision to invest (*Llanelli Star* March 26 1998). Finally, there was the £2.3m investment by Agenda Studios into the refurbished former Tesco building in Park Street in 1998, whose external appearance was improved with a £0.5m public sector town improvement grant (*Llanelli Star* September 3 1998) (Fig 2).

Over the period 1992-97 the combined public and private investment in the town centre exceeded £40m. This investment dramatically changed the environment and retailing in the town. By 1997, it was the opinion of the Carmarthenshire County Council and the WDA that the changes were beneficial:

> "The transformation of Llanelli town centre has been nothing short of a miracle. In just six years a bold and ambitious vision became a reality. A town which has witnessed many highs and lows during its colourful 2000-year history had once again been given a shopping centre of which it can be truly proud. Llanelli can now offer shoppers a first-class mix of national multiples and stores run by local independent traders. The large indoor market is once again attracting people from all over West Wales and the street market, held every Thursday and Saturday, adds colour and character to the town" (Carmarthenshire County Council/WDAa no date).

The phasing of the completion of the main public and private developments referred to above, is tabulated overleaf (Table 3.1). The public sector works were substantially complete by the end of 1996. They involved changes to the quality of the environment of the public realm in the town centre, car parking provision, and the preparation of a site capable of accommodating the St Elli shopping centre. However, the main changes were environmental in nature, not functional, in the sense they did not involve the provision of new facilities. For example, Stepney Arcade, Stepney Precinct, Stepney Street, and Vaughan Street, were pedestrian areas before and after the changes. Their function as

Table 3.1

Phasing of changes to Llanelli town centre

Environmental Works/Development	Completion Date
Vaughan Street	February 1993
New office building, Stepney Street	1993
Stepney Street (West)	September 1994
Nos. 24-26 Stepney Street: Etam	November 1994
Stepney Street (East)	September 1995
Multi-storey car park	October 1995
Entrance to Stepney Precinct	November 1995
Site remediation for shopping centre	May 1996
Stepney Precinct	July 1996
Stepney Place car park & bus station	August 1996
Entrance to Cowell Street Precinct	July 1996
Cowell Street	October 1996
Lucania Buildings, Stepney Street	July 1997
Southern Loop Road opened two way traffic	July 1997
St Elli Shopping Centre	November 1997

Source: Carmarthenshire County Council

pedestrianised shopping streets did not change, although their environment did at the micro-spatial level. The car parking provision did not result in a net increase in the number of spaces, nor did it involve a material change in their location, although at the micro-spatial level there were changes in the layout and means of access to the Stepney Place car park. The alteration to the road network and the preparation of the shopping centre site paved the way for, but did not involve the provision of, new shopping facilities. The main functional change to the town was the opening of the privately funded St Elli shopping centre in November 1997. The completion of the residents' and trader surveys in 1997 prior to the opening of the St Elli shopping centre in November 1997 therefore allows consideration of the impact on the town centre of public investment of an essentially environmental nature, without the distorting effect of the new shopping centre.

Conclusions

Llanelli, a fast growing and thriving town in the 1920s, began to decline in the post war era. By the early 1990s its poor economic and environmental legacy stimulated a response from the public sector to invest heavily in new infrastructure on the coast and the town centre in order to attract new private investment and regenerate the town. During 1992-97 the town centre was subject to changes, described in this chapter, which mainly affected its environment. These changes were aimed at improving the environment of the public realm in the heart of the town centre which was the main focus of retail activity, and creating favourable conditions to attract significant private investment in new shopping attractions. Chapters 5-10 explore the impact of these changes on the town centre's environment and economy, assuming that any positive changes are unlikely to have been caused by a dramatic change in the economy of the town or its hinterland. As context for this exploration, the next chapter sets out the specific research aims and the methods employed to satisfy those aims.

Chapter 4
Methodology

Introduction

Chapter 2 reviewed the literature on town centre regeneration and concluded that there has been little research to investigate the effectiveness of town centre regeneration strategies, or, in particular, to investigate the impact of environmental improvements on the commercial health of those centres. In order to address the lack of knowledge identified, this chapter sets out specific research aims that flow from the general aims that were set out in chapter 1, describes the methods used to meet the specific aims and the timing of the research work.

For the reader's ease the general aims are reproduced below. They are:

1. To review the literature on town centre regeneration, especially to explore policy, practice, and approaches to evaluation.
2. To explore the characteristics of Llanelli's changing economy and competitive status.
3. To identify the steps that have been taken by the public sector to restore vitality and viability to Llanelli town centre since April 1992.
4. To explore the impact of the changes to the environment of Llanelli town centre post 1992 and consider these in a comparative South Wales context.
5. To consider the policy implications of the Llanelli research for town centre regeneration in general.

The strategy to satisfy most of these general aims is to explore the academic and policy literature, local planning documentation and the views of key informants. However, general aims 2 and 4 in particular call for extensive investigation of shopping behaviour and of the opinions of residents and traders. To meet these two aims a number of specific research aims were, therefore, identified:

1. To explore changes in retailer representation in Llanelli town centre

2. To explore patterns of use of Llanelli town centre and change
3. To explore shopping patterns of Llanelli residents and change
4. To explore trading patterns of Llanelli town centre traders and change
5. To explore varying perceptions of the competitive status of Llanelli town centre and change
6. To explore attitudes to Llanelli town centre and the impact of its changing environment
7. To explore varying perspectives of the impact of environmental improvements on comparable towns in South Wales

The use of Llanelli town centre as the single case study allowed an in-depth exploration of the research aims. A multi-method approach was adopted as the best means of obtaining reliable evidence to inform the various explorations from differing perspectives. The advantages and disadvantages of utilising a multi-method approach, that has sometimes been referred to as "triangulation", have been widely discussed in the literature (for example, Brannen 1992; Burgess 1982, 1991; Patton 1990; Philip 1998). Whilst problems regarding the integration of different methods have been raised, Patton reminds us that combined methods can strengthen the study design by looking at research issues from different angles (Patton 1990). Philip (1998) supports this view and argues that:

> "researchers should think beyond the myopic quantitative – qualitative divide when it comes to designing a suitable methodology for their research, and select methods – quantitative, qualitative, or a combination of the two – that best satisfy the needs of specific research projects" (Philip 1998: 273).

Typically the use of multiple methods involves quantitative and qualitative research. Again, the advantages and disadvantages of utilising both are well-documented (Brannen 1992; Bryman 1992; Eyles 1988; Philip 1998; Philo, Mitchell and More 1998; Patton 1990; Robinson 1998). Sometimes these different approaches are referred to as "extensive" and "intensive" research (Lindsay 1997: 36). The differences are explained by Lindsay:

> "...extensive research treats individuals as members of populations, and is concerned with identifying regularities in their behaviour. On the other hand intensive research focuses on the behaviour and attitudes of individuals in their own right, pursuing motivations and causality directly rather than deriving them from the analysis of general patterns" (Lindsay 1997: 36).

A multi-method approach has also been advocated for the evaluation of "area based initiatives" in order to improve the quality of "evidenced based research" and to secure "rich and convincing data". Potential methods identified included, "Intensive, empirical data; surveys of beneficiaries; complementary use of quantitative and qualitative research to help identify causation; evidence collected continually through time; use of "comparators" or base line data" (DETR 2001: 27).

As discussed in chapter 2, the use of published data alone is unlikely to provide a sufficiently comprehensive picture of the health of a town centre and data from specialist surveys is therefore required to supplement published data. The decision was, therefore, taken to carry out large scale residents' and trader surveys, which are described in more detail later in this chapter, to provide the appropriate level of information. In addition to the use of published data and the large-scale surveys, other methods were applied involving pedestrian counts, GOAD plan analysis and interviews with key informants. A matrix illustrating the application of the different methods to the various research aims is set out in Table 4.1.

The large scale residents' and trader surveys provided vital information on shopping behaviour and trading patterns as well as on attitudes to changes to the town centre. These comprised the first and main method employed in the research. The timing of the surveys was crucial to an exploration of the impact of environmental improvements on the revitalisation of Llanelli town centre. They were carried out in 1997 after most of the environmental improvements in the central parts of the town had been completed (1995/96) but before the St Elli shopping centre was opened (Nov/Dec 1997). The surveys, therefore, provided data that facilitated an exploration of the impact of the environmental improvements, *without* the distorting effect of the impact of the new shopping centre.

Table 4.1

Research aims and methods

Research aims	Methods					
	Resi-dents' survey	Trader survey	Ped-estrian counts	Interviews with key informants for Llanelli	GOAD plan analysis	Interviews with key informants for other towns in South Wales
To explore changes in retailer representation in Llanelli town centre	*	*		*	*	
To explore patterns of use of Llanelli town centre and change	*	*	*	*		
To explore shopping patterns of Llanelli residents and change	*					
To explore trading patterns of Llanelli town centre traders and change		*		*		
To explore varying perceptions of the competitive status of Llanelli town centre and change	*	*		*		
To explore attitudes to Llanelli town centre and the impact of its changing environment	*	*		*		
To explore varying perspectives of the impact of environmental improvements on comparable towns in South Wales						*

The second method involved pedestrian counts. Field surveys were carried out in 1997 after the environmental changes were largely completed and were compared with published data for surveys carried out in 1990 before the changes to the environment of the town were commenced. The pedestrian counts were used to inform an exploration of the impact of the changes in the town centre on vitality.

The third research method was GOAD plan analysis, involving a comparison of data on retailer representation for five selected years over the period 1982-99, allowing an exploration of the possible impact of the varying changes in the town on its retail strength.

The fourth and final research method comprised interviews with two sets of key informants at different times and for different purposes. The first interviews were with key informants who had a good knowledge of Llanelli town centre. These were held in 1998 relatively soon after the resident and trader surveys had been completed (and after some preliminary analysis of the trader survey) to provide further insight into the impact of environmental improvements on the town centre. They also provided information to verify the findings of the trader survey. The second interviews, with key informants with knowledge of a number of other towns in South Wales, were carried out in 2000 to allow generalised comparisons with other town centres in South Wales to be made. The purpose of these interviews was to explore the extent to which the Llanelli findings might have more general applicability.

The residents', trader and pedestrian count surveys and the GOAD plan analysis involved quantitative research; although the surveys also provided a qualitative dimension through, for example, the use of "open questions" and an investigation of the reasons why decisions were made by shoppers and traders. The interviews with key informants added a richer qualitative dimension adding insights to the quantitative findings.

The temporal dimension was vital to the impact analysis. As previously discussed, information on changes of retailer representation and vitality was partly obtained from

GOAD plans, and "before" and "after" pedestrian counts. Information on change was also obtained by retrospective questioning of residents, traders and key informants. Whilst this data collection method was preferred within the time and resource constraints available for the thesis, it is important to note that any "changes" identified through retrospective questioning may be "perceived" rather the "real" (De Vaus 1991).

The methods for the two main questionnaire surveys, the residents' and trader surveys, are now set out in detail in this chapter. The methods for the pedestrian counts, the interviews with key informants for Llanelli and comparable South Wales' towns and the GOAD plan analysis are described respectively in chapters 5, 9 and 11.

Residents' survey

In order to satisfy the research aims and obtain information on the attitudes and behaviour of different resident groups, a sample size of 300 households was considered appropriate. This was large enough to define three survey locations, each of which has representative high, middle and lower status enumeration districts that are typical of the whole Borough, whilst being manageable in terms of resources to carry out the survey. It was also large enough to allow Pearson Chi-Square testing of data cross-tabulated by socio-economic group and location. The Chi-Square test identifies whether differences between variables are statistically significant within defined confidence levels, rather than being merely a matter of chance. The survey was designed to investigate the attitudes and behaviour of the residents as a whole and groups of residents with different socio-economic characteristics across the three locations, as well as variation of the residents' attitudes and behaviour by location. There was no intention to examine variable attitudes and behaviour of residents with different socio-economic characteristics within the three locations, since this would probably have required a substantially larger sample size.

The methodology involved the following steps that are elaborated in subsequent sections of the chapter. Firstly, variables from the 1991 census were selected, raw data was converted into percentages, and the mean and standard deviation were calculated for the former Llanelli Borough Council area, which comprised 150 enumeration districts (EDs).

Secondly, Z scores were calculated for each selected variable in each of the 150 EDs. Thirdly, cluster analysis was used to identify groups of EDs with similar socio-economic characteristics. Fourthly, three locations for sample areas were selected. Fifthly, EDs were selected to represent the identified socio-economic groups within the three chosen locations. Sixthly, sample households were selected for the questionnaire survey from the addresses listed in the Electoral Register. Finally, the questionnaire was designed, piloted, and the survey carried out. It was recognised that there are many alternative methods for selecting samples of households (Lindsay 1997; Oppenheim 1992). Some, such as simple random sampling from the Electoral Register, do not involve cluster analysis. Others involve a variation such as the use of principal component analysis to identify factors instead of Z scores for use in cluster analysis. However, the methodology adopted for this thesis met the objective of identifying a representative sample stratified by location, and the major socio-economic groups. It also facilitated the collection of data capable of analysis to allow a better understanding of the impact of public investment in Llanelli town centre on residents' shopping behaviour and attitudes, and where appropriate the generalisation of findings.

To simplify the analysis, 10 key variables were chosen which cover the major socio-economic and demographic characteristics of the population including age, car ownership, tenure, social class, health, and education. The literature suggests that these are key characteristics likely to influence consumer shopping behaviour and attitudes. Surveys reported in a Scottish Office report in 1977 showed that, " Customers at ...large stores are normally car owning, the younger middle aged and mainly parents, for whom the decision to shop at a hypermarket is determined more by income level than by socio-economic group" (quoted in DOE 1992: 40). A study comparing town centre and out of town superstore shopping in Broxbourne Borough Council concluded, "The new superstore caters for the car owning, bulk-buy shoppers, whilst the town centres are now primarily used by the local population, many of whom do not own cars and walk to do their shopping" (quoted in DOE 1992: 68). Other authors have referred to disadvantaged consumers "constrained to use mainly local supermarkets and other small shops", typically including "the elderly, large young families, unskilled manual workers, the unemployed, the sick and infirm, and those without cars" (Westlake1993: 173). Similar constraints have been noted in Ystalyfera, South Wales, where those shopping in-town were "disproportionately drawn from the car-less, the elderly and poorer households" (Bromley and Thomas1995: 433; Thomas and Bromley 1995). Studies in Swansea found that shopping behaviour was primarily related to car ownership and to a lesser extent place of residence and age, rather than socio-economic status (Bromley and Thomas 1993c). Howard and Davies (1993) found that the customer profile for the Metro regional shopping centre was weighted towards the younger, more mobile, and wealthier groups compared with those who used Newcastle town centre (Howard and Davies (1993).

The evidence of these studies formed a context for the selection of variables from the 1991 census for the Llanelli Borough Council area, which are presented below, together with the calculated means and standard deviations (Table 4.2). Variables 1 to 3 were selected because the literature provides evidence to show that age and car ownership affect shopping behaviour. Variables 4 to10 were selected because it was thought that they might also influence shopping behaviour as a consequence of their impact on residents' mobility or prosperity. Ideally, these variables should be statistically independent. Although variables 4 and 5, as well as variables 6 and 7, are not entirely statistically independent, they were chosen because it was thought that they were likely to help identify higher, middle and lower status enumeration districts, one of the objects of the survey design. Z scores were calculated for each of the 10 selected variables for the 150 EDs for the former Llanelli Borough Council area. The Z score was the value of the deviation of each variable from the mean divided by the standard deviation. This was a technique for standardising scores, so that the variables chosen were given equal weight.

Table 4.2

1991 Census variables selected for Llanelli Borough Council area

Variable	Mean	Standard deviation
1. % residents aged 0-15	19.16	3.87
2. % residents aged >65	20.30	6.00
3. % households no car	34.79	13.89
4. % households owner occupation	72.71	17.88
5. % households rent local authority	21.04	18.80
6. % households social class 1+2 of 1-5*	28.68	18.14
7. % households social class 4+5 of 1-5*	24.51	16.44
8. % residents long term illness	20.85	4.75
9. % households of 1 pensioner	17.62	6.34
10. % 18+ without qualification**	90.57	7.09

Note:

* This variable excludes heads of households in the following categories:
Armed forces, Government schemes, Inadequately described, Economically active retired, and "Other" not specified

** "Qualification" includes:
Diploma, Degree, or Higher degree

Cluster analysis groups EDs of similar characteristics for analysis so that data from samples from selected EDs in the groupings can be considered as representative of those groupings as a whole (Johnston 1976; Oppenheim 1992). For this thesis the characteristics of the EDs comprised the 10 selected variables, and the clusters or groupings were those EDs whose variables were closest in value to each other. The closeness between EDs was measured using a calculation based on Pythagoras' Theorem from Euclidean geometry; the square root of the sum of the squared distance on the Z scores for the 10 variables. A hierarchical grouping procedure was adopted. Firstly, the closest two EDs were grouped. Secondly, the next nearest ED to the centroid of the first group was identified, the centroid being the point from which distances to all members of the group summed to the smallest possible value. This ED plus the original two formed the second group. The process was continued step by step until all EDs were in the one group, and a hierarchy of groups was identified. 25 groups of EDs were selected to provide a reasonable basis for classification. Substantially fewer groups might have resulted in clusters of EDs that did not have very similar characteristics, whereas significantly more groups would have defeated the objective of the classification which was to reduce the number of groups to derive a sound but practicable sampling framework. It is recognised, however, that the precise selection of groups includes elements of subjectivity and pragmatism. The cluster analysis identified 9 groups of EDs, each comprising two or more EDs, and 16 groups that comprised a single ED. Table 4.3 provides the mean values for the selected variables for the 9 clusters that comprised two or more EDs.

Five of the nine clusters were discarded because they contained so few EDs. Of the remaining four clusters, three were selected to represent groups of EDs with varying socio-economic characteristics, ranging from high to low status, with differences in key variables such as age and car ownership. The first was Cluster 2 which comprised EDs with populations of broadly similar car ownership, age profile, tenure, marginally lower social class, and marginally lower educational attainment levels compared with the population of the former Llanelli Borough Council area as a whole. These EDs contained residents who were most typical of the Borough as a whole, while representing nearly half of all the EDs. Cluster 2, therefore, represented the middle status residents. The second was Cluster 3 which comprised EDs with populations of higher car ownership, lower proportion of elderly residents, higher home ownership, higher social class, and higher educational attainment levels compared with the population of the former Llanelli Borough Council area as a whole. These represent the more limited areas of higher status residences in the Borough. Cluster 3, therefore, represented the higher status residents. Cluster 3 was preferred to Cluster 1 (not selected) as a higher status cluster because it contained a less elderly population and proportionately more car owners. The third was Cluster 4 which comprised EDs with populations of lower car

Table 4.3

Mean value of selected variables for clusters with two or more enumeration districts

Cluster (CL) No.	CL 1	CL 2	CL 3	CL 4	CL 6	CL 7	CL 11	CL 19	CL 20	Llanelli BC area
No. of EDs	15	74	15	17	4	2	2	2	3	150
% residents aged 0-15	16	20	19	15	20	27	20	14	28	19
% residents aged >65	25	19	15	27	24	11	16	15	9	20
% households no car	28	36	15	46	54	52	23	6	14	35
% households owner occupation	88	72	93	68	37	35	83	81	95	73
% households rented local authority	3	22	3	24	60	61	13	3	0	21
% households social class 1+2	46	22	37	23	26	6	61	63	45	29
% households social class 4+5	11	29	19	17	39	58	7	0	6	25
% residents long term illness	19	20	15	28	27	20	21	18	10	21
% households of 1 pensioner	19	17	11	25	21	9	11	8	9	18
% 18+ without qualifications	85	93	81	93	97	99	93	81	86	91

Source: 1991 Census

ownership, higher proportion of elderly residents, lower home ownership, lower social class, and a marginally lower educational attainment compared with the population of the former Llanelli Borough Council area as a whole. Cluster 4 represented the lower status residents. Cluster 2 comprised 49%, Cluster 3 comprised 10%, and Cluster 4 comprised 11% of EDs in the former Llanelli Borough Council area, in total a representation of 70% of EDs.

Location is a key factor in influencing shopping behaviour. Three locations were selected, which had EDs from each of the selected cluster groupings. The first was Llanelli, which comprised the nearest and most accessible major urban area served by the town centre. It was assumed residents in Llanelli were most likely to have an intimate knowledge of the centre, an important consideration given the fact that a principal objective of the survey was to ascertain residents' views. It was proposed that the sample area should be at least 0.5 km from both the town centre and the Trostre Retail Park to better represent the majority of residents of Llanelli who were beyond easy walking distance of these locations. The second location selected was Burry Port, situated approximately 5.0 to 6.0 km west of Llanelli town centre. It was also assumed that Burry Port residents would have a reasonable knowledge of Llanelli town centre. They had good accessibility to Carmarthen as well as Llanelli and Swansea. Llanelli town centre and Trostre Retail Park would provide choices of intervening shopping facilities between Burry Port and Swansea. Llangennech, between 4.5 and 6.0 km east of Llanelli town centre, was chosen as the third location. Llangennech residents were assumed to have as good a knowledge of Llanelli town centre as those of Burry Port, and good accessibility to Carmarthen, Cross Hands, Pontarddulais, and Swansea as well as to Llanelli town centre and Trostre Retail Park. Llangennech residents were considered more likely to travel further afield as Llanelli is not an intervening opportunity for them.

In each of the three selected locations three EDs were chosen, one from each of the cluster groupings 2, 3 and 4. The aim was to select EDs in the three locations which had, for each cluster group, similar characteristics especially in relation to car ownership and age which are known to be critical variables influencing shopping behaviour. The location of the EDs is shown in Fig 3. The characteristics of the EDs selected in each location are set out in Tables 4.4 -4.6.

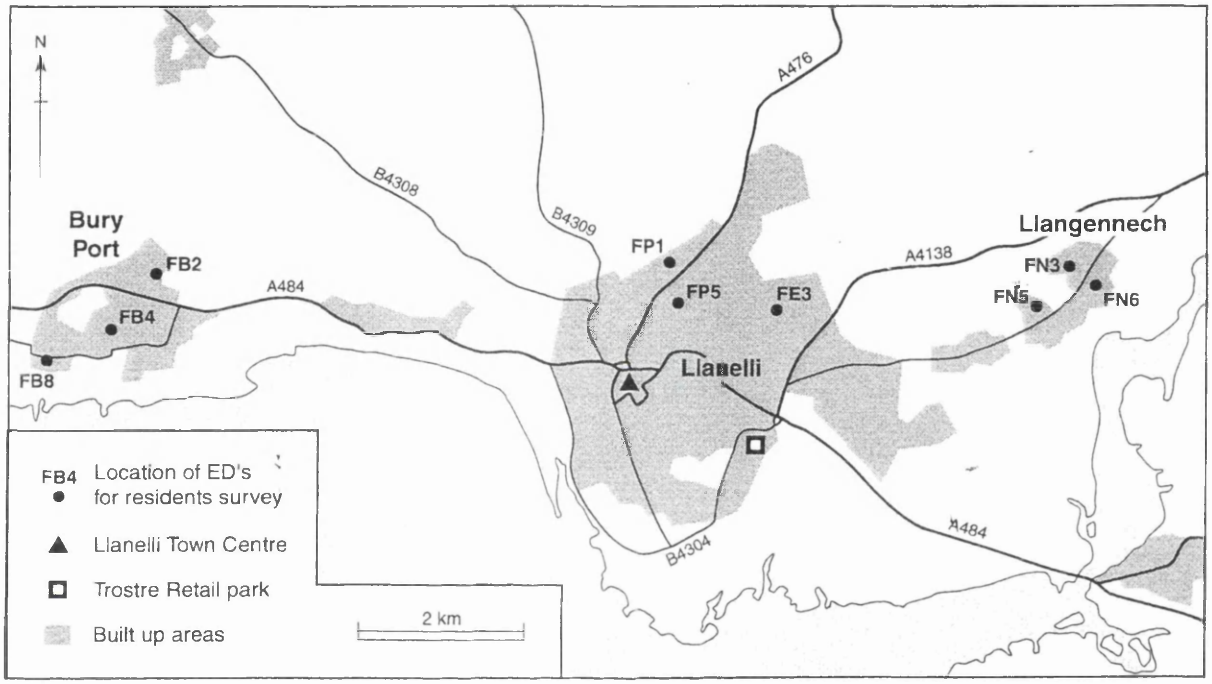

Fig 3: Location of EDs for residents' survey

Table 4.4

Llanelli: population characteristics for selected enumeration districts

Population characteristics	Enumeration District Code Number (Cluster Number)		
	FE3(2) Middle status	FP1(3) Higher status	FP5(4) Lower status
% residents aged 0-15	21	17	14
% residents aged >65	17	17	29
% households no car	33	14	41
% households owner occupation	64	97	79
% households rent local authority	29	0	20
% households social class 1+2 of 1-5	18	57	40
% households social class 4+5 of 1-5	36	14	20
% residents long term illness	20	13	27
% households of 1 pensioner	11	14	32
% 18+ without qualification	88	78	88

Source: 1991 Census

Table 4.5

Burry Port: population characteristics for selected enumeration districts

Population characteristics	Enumeration District Code Number (Cluster Number)		
	FB4(2) Middle status	FB2(3) Higher status	FB8(4) Lower status
% residents aged 0-15	20	17	16
% residents aged >65	22	19	29
% households no car	32	17	46
% households owner occupation	82	99	54
% households rent local authority	10	1	42
% households social class 1+2 of 1-5	22	25	0
% households social class 4+5 of 1-5	22	42	0
% residents long term illness	19	14	34
% households of 1 pensioner	21	12	31
% 18+ without qualification	90	85	93

Source: 1991 Census

Table 4.6

Llangennech: population characteristics for selected enumeration districts

Population characteristics	Enumeration District Code Number (Cluster Number)		
	FN6(2) Middle status	FN5(3) Higher status	FN3(4) Lower status
% residents aged 0-15	15	20	14
% residents aged >65	26	15	27
% households no car	29	13	37
% households owner occupation	91	93	63
% households rent local authority	1	4	35
% households social class 1+2 of 1-5	55	46	0
% households social class 4+5 of 1-5	9	9	29
% residents long term illness	22	15	26
% households of 1 pensioner	18	12	17
% 18+ without qualifications	93	77	89

Source: 1991 Census

The chosen household sample sizes were 120 for Llanelli, 90 for Burry Port, and 90 for Llangennech. The larger sample planned for Llanelli was designed to reflect the larger core population living in the area. 1991 Census ED maps were examined to identify the streets within the ED boundaries selected. Individual households were selected from the Register of Electors (Valid to February 1997) for those streets, using a systematic random sampling technique. If the selected household could not be contacted after three calls, or refused to be interviewed, the nearest neighbour was selected. The number and % of households sampled in each ED, and the size of interval for selection is indicated overleaf (Table 4.7). The household sample within the EDs varied between 14% and 20% of households. The location, by street, of households surveyed is set out in Appendix 1.

Table 4.7

Sampling framework for Llanelli, Burry Port, and Llangennech

Sampling Parameters	Llanelli ED Code Number			Burry Port ED Code Number			Llangennech ED Code Number		
	FE3	FP1	FP5	FB4	FB2	FB8	FN6	FN5	FN3
No. of households	226	230	196	211	184	181	199	192	156
Household sample size	39	40	43	30	30	30	30	30	28
% sample size	17	17	22	14	16	17	15	16	18
Interval size	6	6	5	7	6	6	7	6	6

The questionnaire (see Appendix 2) was designed to obtain information and opinions from residents. A mixture of open and closed questions was devised to check the consistency of responses. The closed questions were pre-coded, whereas responses from open questions were classified and coded after the survey. Leading questions were avoided. A draft of the questionnaire was piloted with two Llanelli residents, and as a result, minor modifications were made. Data from the survey were analysed by computer using the Statistical Package for the Social Sciences.

The rationale for the main issues covered in the questionnaire is now briefly discussed. Firstly, questions 1-2 and 28-31 were designed to capture data relating to the socio-economic characteristics of the interviewee and the residents in the selected household. This allowed cross-tabulations of residents' attitudes and behaviour with identified socio-economic variables. The other questions were also designed to provide information to satisfy a number of the specific research aims identified earlier in the chapter. Questions 8 and 9 provided information on the use of the town centre as a whole and its constituent streets in order to satisfy specific research aim 2. Questions 3-7 provided information on residents' grocery, clothes, furniture, electrical and DIY goods shopping behaviour, in order to satisfy specific research aim 3. Questions 10-11 and 22-27 compared residents' attitudes for Llanelli town centre with those for Cardiff, Carmarthen, Neath, Port Talbot and Swansea, to satisfy specific research aim 5. Finally, to satisfy specific research aim 6, questions 10-21, through a range of direct and indirect questions, sought to obtain data to explore attitudes to Llanelli town centre and the impact of its changing environment.

In order to check the representativeness of the residents' survey a comparison was made with data between the survey and the 1991 Census (Tables 4.8-4.10). The key variables selected for the comparison were those relating to age, and car ownership, factors known to be important influences of shopping behaviour.

Table 4.8

Llanelli: population characteristics for selected enumeration districts

Population characteristics	ED FE3 – middle status			ED FP1 – higher status			ED FP5 – lower status		
	1997 Residents' survey		1991 Census	1997 Residents' survey		1991 Census	1997 Residents' survey		1991 Census
	n	%	%	n	%	%	n	%	%
Residents aged 0-15	15	15.3	21	12	12.9	17	10	10.9	14
Residents aged 60+	30	30.6		30	32.3		45	48.9	
Residents aged >65			17			17			29
Households No car	6	15.4	33	2	5.6	14	12	28.6	41

Source: 1991 Census; 1997 Residents' survey

Table 4.9

Burry Port: population characteristics for selected enumeration districts

Population characteristics	ED FB4 – middle status			ED FB2 – higher status			ED FB8 – lower status		
	1997 Residents' survey		1991 Census	1997 Residents' survey		1991 Census	1997 Residents' survey		1991 Census
	n	%	%	n	%	%	n	%	%
Residents aged 0-15	18	22.5	20	13	17.1	17	14	19.4	16
Residents aged 60+	18	22.5		22	28.9		20	27.8	
Residents aged >65			22			19			29
Households No car	9	30.0	32	3	10.0	17	8	27.6	46

Source: 1991 Census; 1997 Residents' survey

Table 4.10

Llangennech: population characteristics for selected enumeration districts

Population characteristics	ED FN6 – middle status			ED FN5 – higher status			ED FN3 – lower status		
	1997 Residents' survey		1991 Census	1997 Residents' survey		1991 Census	1997 Residents' survey		1991 Census
	n	%	%	n	%	%	n	%	%
Residents aged 0-15	13	18.6	15	10	13.0	20	9	14.8	14
Residents aged 60+	16	22.9		25	32.5		17	27.9	
Residents aged >65			26			15			27
Households No car	6	21.4	29	5	16.7	13	8	29.6	37

Source: 1991 Census; 1997 Residents' survey

There was not a great difference between the 1991 Census and the residents' survey in relation to the % of residents aged 0-15. The average difference in % of residents aged 0-

15 for the EDs in each location 1991-1997 was Llanelli -4.3%, Burry Port +2.0%, and Llangennech +0.8%. The difference for the % of elderly residents (1991>65; 1997 60+) was larger in Llanelli, but negligible in the other locations. The average difference in % of elderly residents for the EDs in each location 1991-1997 was Llanelli +16.3%, Burry Port +3.1%, and Llangennech +5.1%. There were also differences in levels of car ownership between 1991 and 1997, but these were not unexpected given the trend of increasing car ownership levels in the UK. The average difference of % of households with no car for the EDs in each location 1991-1997 was Llanelli -12.8%, Burry Port -9.2%, and Llangennech -3.7%. Overall, the analysis suggests the residents' survey was broadly representative of the population in the EDs selected, but with some bias towards a higher proportion of more elderly residents in Llanelli, and slightly higher car ownership levels in Burry Port and Llanelli.

The issue of whether the residents' survey reflected differences in the socio-economic status of the residents in the EDs within the three locations was explored in relation to car ownership levels, and the proportion of elderly residents, key variables known to influence shopping behaviour. Data from the 1991 Census showed that car ownership levels were highest in the higher status EDs, and lowest in the lower status EDs for each location. The pattern was similar for data from the residents' survey, with the exception of the middle status ED for Burry Port where car ownership levels were lower than would have been expected. Data from the 1991 Census also showed that the proportion of elderly residents was highest in the lower status EDs, and lowest in the higher status EDs for each location. The pattern was similar for data from the residents' survey, with the exception of the higher status EDs in Burry Port and Llangennech where the % of elderly residents was higher than would have been expected.

A principal aim of the residents' survey was to provide data that would allow a comparison between households drawn from three separate locations, and to be representative of different socio-economic groups. The survey was designed to allow cross-tabulations of residents' behaviour and attitudes with several key socio-economic variables: age composition of household, age of principal shopper, car ownership, employment status, household size, and social class. Cross-tabulations were run between the key socio-economic variables and the three locations (Tables 4.11-4.16). Application of the Pearson Chi-Square test showed there were no significant socio-economic variations between the locations at the 95% confidence level. A primary objective of the survey had, therefore, been met. The survey data could be used to explore variations in shopper attitudes and behaviour by location, as well as for groups of residents with different socio-economic characteristics.

Table 4.11
Age composition of households by location

Location of residents	n	Age composition of households % of respondents			
		Adult(s) + child(ren) under 16	All aged 16-59	Mix of under 60 and 60+	All 60+
Llanelli	111	13.5	25.2	12.6	48.6
Burry Port	88	23.9	31.8	5.7	38.6
Llangennech	84	19.0	35.7	6.0	39.3
Total	283	18.4	30.4	8.5	42.8

Differences not significant at 95% confidence level

Source: 1997 Residents' survey

Table 4.12

Age group of principal shopper by location

Location of residents	n	Age of principal shopper % of respondents			
		Under 30	30-44	45-59	60+
Llanelli	121	11.6	14.9	26.4	47.1
Burry Port	89	5.6	29.2	25.8	39.3
Llangennech	87	9.2	20.7	29.9	40.2
Total	297	9.1	20.9	27.3	42.8

Differences not significant at 95% confidence level

Source: 1997 Residents' survey

Table 4.13

Car ownership by location

Location of residents	n	Household car ownership % of respondents	
		Own car	No car
Llanelli	117	82.7	17.1
Burry Port	89	77.5	22.5
Llangennech	85	77.6	22.4
Total	291	79.7	20.3

Differences not significant at 95% confidence level

Source: 1997 Residents' survey

Table 4.14

Employment status by location

Location of residents	n	Employment status % of respondents		
		Household with 1+ adult in work	Household with no adult in work	Retired/ other
Llanelli	116	47.4	5.2	47.4
Burry Port	86	47.7	9.3	43.0
Llangennech	83	57.8	4.8	37.3
Total	285	50.5	6.3	43.2

Differences not significant at 95% confidence level

Source: 1997 Residents' survey

Table 4.15

Size of household by location

Location of residents	n	Size of household (no. of people) % of respondents			
		1	2	3 or 4	5 or more
Llanelli	119	21.0	43.7	29.4	5.9
Burry Port	89	15.7	47.2	30.3	6.7
Llangennech	87	24.1	40.2	27.6	8.0
Total	295	20.3	43.7	29.2	6.8

Differences not significant at 95% confidence level

Source: 1997 Residents' survey

Table 4.16

Social class of households by location

Location of residents	n	Social class % of respondents			
		Social class 1-2	Social class 3-5	Retired	Unemployed/ housewives/ students
Llanelli	112	25.0	29.5	40.2	5.4
Burry Port	86	18.6	36.0	33.7	11.6
Llangennech	80	23.8	30.0	40.0	6.3
Total	278	22.7	31.7	38.1	7.6

Differences not significant at 95% confidence level

Source: 1997 Residents' survey

Trader survey

The trader survey was developed in two stages. The first stage involved the identification of all the appropriate premises for the trader questionnaire survey in the central area of Llanelli from an examination of the 1992 GOAD plan, up dated by field survey work. 159 appropriate premises were identified in the main shopping streets of the town centre most affected by the changes to the town centre. The initial aim was to achieve a near 100% survey of all the central premises identified, including as complete as possible a set of responses from retailers. The aim was also to obtain good responses from banks or building societies, and cafes and restaurants. Public houses, estate agents, and offices were excluded. The managers or owners of the shops or businesses were approached and asked whether they would agree to be interviewed. In most instances managers or owners were too busy to be interviewed during normal working hours. To overcome this problem they were given some days, usually a week, to complete the questionnaire in their own time. An appointment was made to revisit the premises to pick up the questionnaire, and quickly go through it to ensure it was completed as fully as possible. In some cases the questionnaire was not completed after a week, and repeat visits were made so long as the manager or owner expressed a willingness to continue to co-operate. It was not unusual for three or four repeat visits to be made before the completed questionnaire was obtained. In some cases the questionnaire was returned by post and a telephone follow up was made if clarification of certain responses was required. The result was that 95 usable questionnaires were obtained from the 159 traders initially selected. Whilst this was a good result given the practical difficulties of persuading busy traders to co-operate, it was decided to target additional traders in more peripheral areas of the town, in order to increase the coverage of the survey.

For stage two, the survey area was widened to include other streets within the area covered by the 1992 GOAD plan. These were located further away from the area of main change in the town centre. A similar strategy for selection of premises for the survey was adopted as for stage 1, focusing on retail rather than office functions. For this second stage a further 45 premises were identified, and a further 28 usable questionnaires were obtained. Overall from stages one and two, 204 premises were targeted to be surveyed, and 123 usable questionnaires were obtained. The location of traders identified and surveyed is set out in Table 4.17. The GOAD summary report for December 1996 lists 220 outlets that were occupied in Llanelli town centre. The 204 premises therefore represented the vast majority of those traders in the town centre.

The questionnaire was designed to obtain information and opinions from traders (see Appendix 3). A mixture of open and closed questions was devised to check the consistency of responses. The closed questions were pre-coded, whereas responses from open questions were classified and coded after the survey. Leading questions were avoided. A draft of the questionnaire was the subject of consultation with the Llanelli Chamber of Commerce and was piloted with an independent and a multiple trader located in the town centre. As a result of the consultation and piloting, the questionnaire was shortened, simplified, and certain questions of a sensitive confidential nature were refined in order to increase the prospects that traders would be willing to participate in the survey. Data from the survey were analysed by computer using the Statistical Package for the Social Sciences.

The rationale for the main issues covered in the questionnaire is now briefly discussed. Firstly, questions 1-6 were designed to capture background information on the trader and the property surveyed. Question 5 and other information recorded on the questionnaire allowed cross-tabulations of trader attitudes and behaviour with variables such as the type, size and location of outlet. The questions were also designed to provide information to satisfy a number of the specific research aims identified earlier in the chapter. Question 8 provided information on the use of the town centre as a whole and the streets within which the trader was located in order to satisfy specific research aim 2. Question 7 and questions 18-20 provided information on employment, turnover, profitability and rental values in order to satisfy specific research aim 4. Questions 25-30 compared trader attitudes for Llanelli town centre with those for Cardiff, Carmarthen, Neath, Port Talbot and Swansea, to satisfy specific research aim 5. Finally, to satisfy specific research aim 6, questions 9-17 and 21-24 sought to obtain data to explore attitudes to Llanelli town centre and the impact of its changing environment.

Table 4.17

Location of traders in the survey

Street	Premises identified	Survey completed	Survey refused/no response
<u>Stage 1</u>			
Vaughan Street	14	11	3
Stepney Street	55	28	27
Stepney Arcade	7	7	0
Stepney Precinct	8	2	6
Park Street	6	6	0
Upper Park Street	5	4	1
Indoor Market	20	8	12
Market Precinct/Coop	18	10	8
Market Street	3	3	0
Cowell Precinct	7	3	4
Cowell Street	16	13	3
Sub-total	159	95	64
<u>Stage 2</u>			
Murray Street	13	7	6
John Street	3	3	0
Station Road	20	12	8
Bridge Street	3	3	0
Thomas Street	3	1	2
Other Streets	3	2	1
Sub-total	45	28	17
Total	204	123	81

In order to provide a check on how representative the trader survey was, data from that survey were compared to that contained in the GOAD plan summary report for December 1996 for Llanelli town centre as a whole. The comparisons related to location, type of outlet, and outlet size.

Within town centres trading performance depends partly on location. Location is therefore an important variable in the analysis. In considering the potential of Llanelli town centre for new shopping centre development in 1992, Management Horizons broadly identified primary or secondary shopping areas within the town (Management Horizons 1992). The prime area comprised Vaughan Street containing major anchor stores such as Marks and Spencer, Boots and WH Smith, and most of Stepney Street where national multiples were concentrated. The secondary area comprised Stepney Precinct, the Co-op Living Store, the Market and parts of Cowell Street including Pugh Bros furniture store. The secondary area also included the South Wales Electricity Board and Gas Board showrooms both of which no longer trade within the area, but were important outlets in 1992. The areas, which are shown on Fig 4, were defined as prime, secondary, and peripheral for analysis. The total survey area was covered by the December 1996 GOAD plan for the town centre. The prime and secondary areas were based on those defined by Management Horizons, with the peripheral area being the remaining part of the town within the area covered by the GOAD plan.

Table 4.18

Location of outlets in Llanelli

Location of Outlet	1997 Trader survey		1996 GOAD
	No.	% of outlets	% of outlets
Prime	30	24.4	20.9
Secondary	26	21.1	15.9
Periphery	67	54.5	63.2
Total	123	100.0	100.0

Source: 1997 Trader survey; 1996 GOAD Summary Report

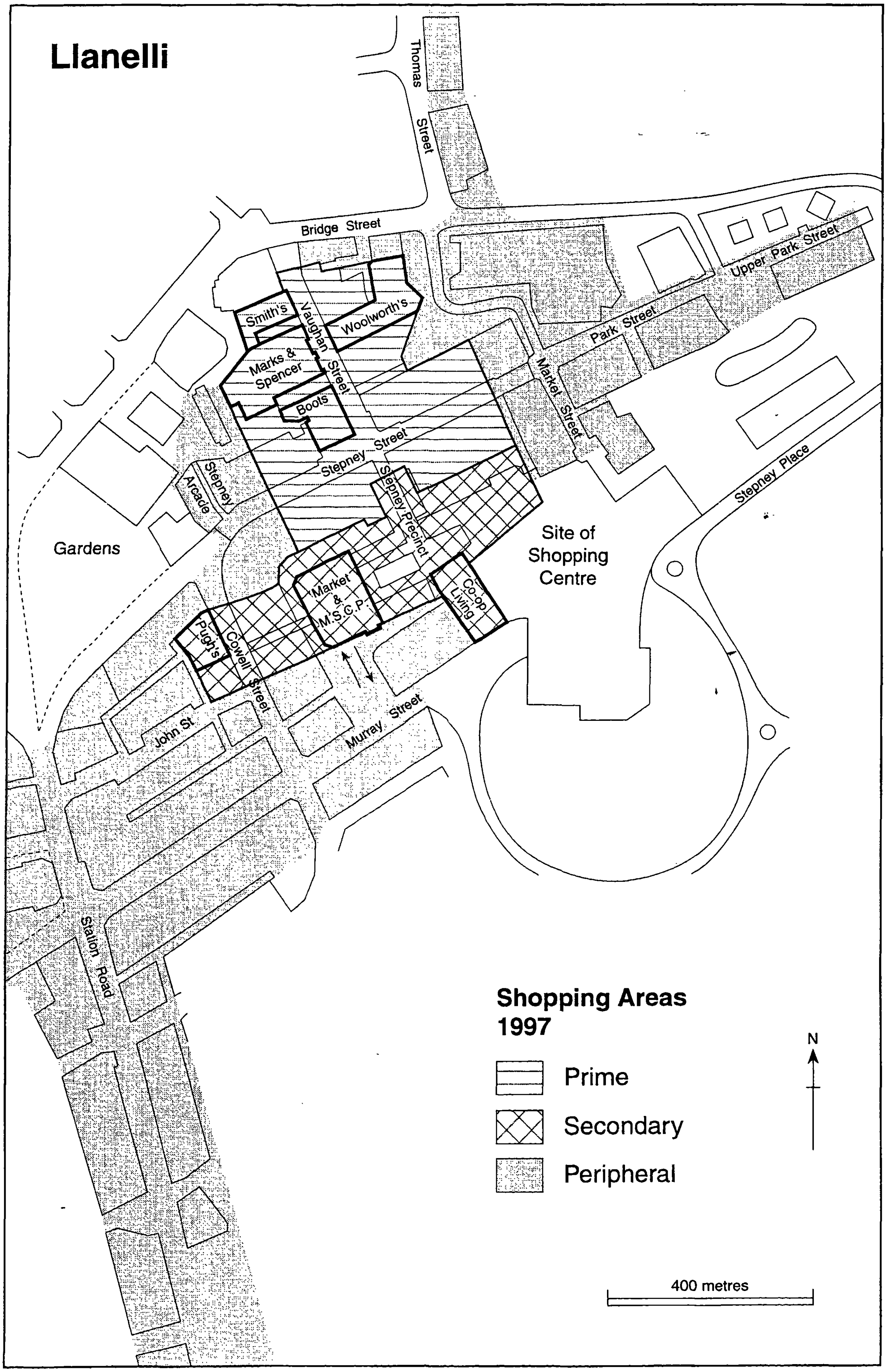

Fig 4: Prime, secondary and peripheral shopping areas 1997

The trader survey contained a slightly higher proportion of traders in the prime and secondary areas (Table 4.18). This reflects the decision to give priority to the selection of outlets in the central areas of the town which were most affected by the public investment.

Type of outlet was considered in relation to two characteristics, the type of goods sold or service offered, and whether or not the outlet was a major comparison store. The December 1996 GOAD summary report classifies outlets into convenience, comparison, service, and other. Data from the trader survey were classified on the same basis. Compared to the town centre as a whole the trader survey over represented comparison (difference 13%) and under represented service outlets (difference 12%) (Table 4.19). This is as a result of the decision to survey shops in preference to service outlets in order to focus the research on retailing issues.

Table 4.19

Type of outlets in Llanelli

Type of outlet	1997 Trader survey		1996 GOAD
	No.	% of outlets	% of outlets
Convenience	9	7.3	8.3
Comparison	89	72.4	59.4
Service	25	20.3	32.2
Total	123	100	100

Source: 1997 Trader survey; 1996 GOAD Summary Report

Management Horizons (1992) listed the major comparison stores in Carmarthen, Llanelli, and Swansea. These were mainly national multiples. The list prepared by Management Horizons was used to classify the outlets in the trader survey as major comparison or other.

Table 4.20

Type of outlets in Llanelli

Type of outlet	1997 Trader survey		1996 GOAD
	No.	% of outlets	% of outlets
Major comparison	21	17.1	12.2%
Other	102	82.9	87.8%
Total	123	100.0	100.0

Source: 1997 Trader survey; 1996 GOAD Summary Report

The trader survey contained a higher proportion of major comparison shops than the town centre did as a whole (Table 4.20). This reflects the decision to give priority to the selection of retail shops in the central parts of the town centre which were most affected by the changes to the town centre. It is the central parts of the town centre, especially the prime area, where most of the major comparison shops are located.

The December 1996 GOAD summary report classifies outlets by size in sq ft bands. In relation to their summary reports, GOAD advises that "floorspace figures quoted are neither net nor necessarily always the gross area of the outlets. These figures are derived from the GOAD plan which may show only the site area without building lines. These figures are therefore useful as a means of comparison between centres, because they are all measured in the same way, but should not be read as a definitive report of floorspace in the subject town or centre" (GOAD, no date). The GOAD figures are ground-floor footprint floorspace figures. The ground-floor footprint floorspace area of each outlet in trader survey was classified on the same basis as the 1996 GOAD summary report. The proportion of outlets in each size band did not vary greatly between the trader survey and the GOAD summary report. The main difference was a slightly higher proportion of smaller outlets under 1000 sq ft in the trader survey (Table 4.21). It probably arose because the trader survey included eight indoor market traders that were not included in the 1996 GOAD data.

Table 4.21

Size of outlets in Llanelli

Size of outlet	1997 Trader survey		1996 GOAD
	No.	% of outlets	% of outlets
Under 1000 sq ft	37	30.1	24.9
1000-2499 sq ft	63	51.2	55.1
2500-4999 sq ft	17	13.8	14.1
5000- 9999 sq ft	3	2.4	3.8
10000-14999 sq ft	1	0.8	0.7
15000-19999 sq ft	1	0.8	0.3
20000-29999 sq ft	1	0.8	0.7
Total	123	100	100

Source: 1997 Trader survey; 1996 GOAD Summary Report

As a consequence of the survey strategy the trader survey slightly over represented major comparison, smaller outlets, and those located in the central areas of the town. The degree of over-representation was not great, and the survey provided a good response from various types of trader throughout the town. The survey of 123 traders also comprised a majority of traders in the town. It was therefore possible to use the findings of the survey to inform consideration of the impact of public investment on the town centre as a whole.

Conclusions

The Llanelli research involved obtaining and analysing data from surveys of 300 residents and 123 traders, holding interviews with nine key informants who had a good knowledge of the town, carrying out pedestrian counts and analysing GOAD plan data for five selected years over the period 1982-99. In addition, interviews with 18 key informants in comparable towns in South Wales in 2000 facilitated an exploration of the extent to which the Llanelli findings had more general applicability in a number of town centres across a wider geographical area. Whilst some of these research methods are described in detail in subsequent chapters (5, 9 and 11), this chapter has concentrated on the methodology for the two main questionnaire surveys. The next chapter explores the residents' use and views of Llanelli town centre.

Chapter 5
Residents' use and views of Llanelli town centre

Introduction

Chapter 3 revealed evidence of the perceived decline in Llanelli town centre, and described the local initiatives that were taken, or planned, in the period 1992-97 to enhance its environment, vitality and viability. This chapter looks at the functional roles of Llanelli town centre, and explores the way it is used for shopping by residents living in the town and its surrounding areas. It also explores how the use of the town centre has changed, with a particular view of identifying the impact of public investment in the environment on its vitality. The chapter draws mainly on information from the residents' survey, but also on the trader survey which is discussed in detail in the next chapter, pedestrian count surveys, as well as from published and other reports.

Use of Llanelli town centre

In order to gain an insight into the role and use of Llanelli town centre, the residents were asked to give the main reason for visiting the centre, and to say how frequently they visited the town (Tables 5.1-5.2). It was evident the town had a dominant retail role, with limited social, entertainment, or employment use. 255 (89.9%) residents said their main reason for using the town was for shopping. Whilst the town, therefore, retained an important retail function, it appeared to lack diversity in terms of other town centres uses, which can contribute to vitality and viability (DOE 1994; Evans 1997; Jacobs 1961; Montgomery 1995, 1998). Despite this, most residents used the town frequently; 212 (71.2%) visited the town once a week, or more often.

Table 5.1

Reason for visiting Llanelli town centre

Reason	No.	% of respondents
Shopping	255	89.8
Socialising	8	2.8
Work	6	2.1
Entertainment	3	1.1
Other	12	4.2
Total	284	100

Source: 1997 Residents' survey

Table 5.2
Frequency of visiting Llanelli town centre

Frequency	No.	% of respondents
Several times a week	97	32.6
Weekly	96	32.2
Fortnightly	44	14.8
Daily	19	6.4
Monthly	16	5.4
Less frequently	26	8.7
Total	298	100

Source: 1997 Residents' survey

Residents were also asked whether their use of the town had changed since 1992 as one way of exploring the possible impact of public investment on the town centre (Tables 5.3-5.4).

Table 5.3
Changing use of Llanelli town centre for shopping

Level of use	No.	% of respondents
Same	180	60.6
Less often	81	27.3
More often	36	12.1
Total	297	100

Source: 1997 Residents' survey

Table 5.4

Changing use of Llanelli town centre for entertainment

Level of use	No.	% of respondents
Same	239	81.8
Less often	33	11.3
More often	20	6.8
Total	292	100

Source: 1997 Residents' survey

For those residents who thought their use of the town for shopping had changed (117 or 39.4%), 81, a majority, used the town less often compared with only 36 who used the town more often. For those residents who thought their use of the town for entertainment had changed (53 or 18.2%), 33, a majority, used the town less often compared with only 20 who used the town more often. The responses were consistent with an overall decline in the vitality of the town centre, especially for shopping use, a problem not unique to Llanelli, but identified in other UK towns and cities (for example, DOE 1992; DOE 1994; Bromley and Thomas 1995; Thomas and Bromley 1995; URBED 1997).

The issue of whether there were any variations between the types of residents who used the town centre most frequently, or those who used the town centre more often than they used to, was also explored. Cross-tabulations were run between residents' frequency of using the town centre and the variables: age composition of household, age of principal shopper, car ownership, employment status, household size, location, and social class. Cross-tabulations were also run between those variables and residents' change of their use of the town for shopping. The application of the Pearson Chi-Square test identified several significant relationships at the 95% confidence level. Firstly, a higher proportion of residents who lived nearest the town used it most frequently (Table 5.5).

Table 5.5

Frequency of visiting Llanelli town centre

Location of residents	n	Frequency % of residents		
		Daily/several times a week	weekly	Fortnightly/ less frequently
Llanelli town	121	54.5	38.0	7.4
Burry port	90	33.3	22.2	44.4
Llangennech	87	23.0	34.5	42.5
Total	298	38.9	32.2	28.9

Above 95% confidence level

Chi-Square 50.624 df4 Significance 0.000

Source: 1997 Residents' survey

66 (54.5%) Llanelli town residents used the town centre daily or several times a week compared with 30 (33.3%) Burry Port and 20 (23.0%) Llangennech residents. The difference probably reflects the greater accessibility and convenience of the town centre to those living nearest to it.

Table 5.6

Change of use of Llanelli town centre for shopping

Location of residents	n	Use of town for shopping % of residents		
		Less often	More often	Same
Llanelli town	121	26.4	19.0	54.5
Burry Port	89	30.3	9.0	60.7
Llangennech	87	25.3	5.7	69.0
Total	297	27.3	12.1	60.6

Above 95% confidence level

Chi-Square 10.570 df4 Significance 0.032

Source: 1997 Residents' survey

Table 5.7

Change of use of Llanelli town centre for shopping

Age of residents (principal shopper)	n	Use of town for shopping % of residents		
		Less often	More often	Same
Under 30	27	11.1	25.9	63.0
30-44	62	27.4	3.2	69.4
45-59	80	30.0	10.0	60.0
60+	126	29.4	13.5	57.1
Total	295	27.5	11.5	61.0

Above 95% confidence level

Chi-Square 13.177 df6 Significance 0.040

Source: 1997 Residents' survey

Secondly, a higher proportion of residents who lived nearest to the town, and those who were younger, used it more than they used to (Tables 5.6-5.7). 23 (19.0%) Llanelli town residents used the town centre more often compared with 8 (9.0%) in Burry Port, and 5 (5.7%) in Llangennech. 7 (25.9%) residents aged under 30 (principal shoppers) used the town centre more often than they used to compared with 2 (3.2%) aged 30-44, 8 (10.0%) aged 45-59, and 17 (13.5%) who were 60+. The use of the town more often by younger residents might suggest greater future use, as the population in the area matures. It might also imply the younger residents were more responsive to, or better liked, the changes in the town.

In order to better understand why their use of the town had changed the residents were asked to give reasons for using the town centre more or less often (Tables 5.8-5.9). 60 residents gave reasons why they used the town less often. Of these, 26 (43.3%) were put off by the mess or disruption due to the building works. 23 (38.3%) used the town less often because they were dissatisfied with the town centre, or they were concerned at its decline, or the loss of shops, or facilities. Only 24 residents gave reasons for using the town more often. Of these, 16 (66.7%), the vast majority, did so because they thought the town was nicer, or it had a better environment. Negative concerns regarding the inadequacy of shops and disruption; and the positive influence of a good quality environment on consumer behaviour are factors noted in other UK surveys (DOE 1997; Evans 1997; Hass-Klau 1993; Lockwood 1997; Page and Hardyman 1996; Thomas and Bromley 1995). However, in Llanelli, the public investment in environmental improvements appeared to have had a positive effect in influencing the shopping behaviour of only a small number of residents; overall its impact may not have been very great.

Table 5.8

Reason for using Llanelli town centre less often

Reasons	No.	% of respondents
Mess/upheaval/disruption of building works	26	43.3
Dissatisfied with Llanelli	12	20.0
Decline/loss of shops/facilities	11	18.3
Reduced mobility due to age/health	2	3.3
Out of town shopping facilities improved	1	1.7
Less time	1	1.7
Loss of character	1	1.7
Other	6	10.0
Total	60	100

Source: 1997 Residents' survey

Table 5.9

Reason for using Llanelli town centre more often

Reasons	No.	% of respondents
Nicer or better town/environment	16	66.7
Better shopping facilities	1	4.2
More time now	1	4.2
Other	6	25.0
Total	24	100

Source: 1997 Residents' survey

An understanding of the role of Llanelli town centre and residents' use of the centre is greatly enhanced by an analysis of consumer behaviour. Residents were asked about their main shopping locations for groceries, clothes, furniture, electrical, and DIY goods (Table 5.10-5.14).

Table 5.10

Location for majority of residents' grocery shopping

Location	No.	% of responses
Llanelli area		
Llanelli Trostre Park	178	60.1
Llanelli off-centre	49	16.6
Llanelli town centre	21	7.1
Llangennech	18	6.1
Burry Port	13	4.4
Major towns		
Swansea	6	2.0
Carmarthen	4	1.4
Other centres		
Cross Hands	4	1.4
Gorseinon	2	0.7
Other	1	0.3
Total	296	100

Source: 1997 Residents' survey

Table 5.11

Location for majority of residents' clothes shopping

Location	No.	% of responses
Llanelli area		
Llanelli town centre	164	55.8
Llanelli Trostre Park	3	1.0
Llanelli off-centre	1	0.3
Burry Port	1	0.3
Major towns		
Swansea	92	31.3
Carmarthen	11	3.7
Cardiff	4	1.4
Other centres		
Cross Hands	1	0.3
Other	17	5.8
Total	294	100

Source: 1997 Residents' survey

Table 5.12

Location for majority of residents' furniture shopping

Location	No.	% of responses
Llanelli area		
Llanelli town centre	66	28.7
Llanelli Trostre Park	29	12.6
Llanelli off-centre	4	1.7
Major towns		
Swansea	52	22.6
Cardiff	6	2.6
Carmarthen	4	1.7
Other centres		
Cross Hands	43	18.7
Gorseinon	19	8.3
Other	7	3.0
Total		

Source: 1997 Residents' survey

Table 5.13

Location for majority of residents' electrical shopping

Location	No.	% of responses
Llanelli area		
Llanelli town centre	127	45.0
Llanelli Trostre Park	90	31.9
Llanelli off-centre	11	3.9
Burry Port	1	0.4
Major towns		
Swansea	27	9.6
Carmarthen	7	2.5
Other centres		
Cross Hands	11	3.9
Gorseinon	1	0.4
Other	7	2.5
Total	282	100

Source: 1997 Residents' survey

Table 5.14

Location for majority of residents' DIY shopping

Location	No.	% of responses
Llanelli area		
Llanelli Trostre Park	170	70.2
Llanelli town centre	13	5.4
Llanelli off-centre	6	2.5
Burry Port	6	2.5
Major towns		
Swansea	14	5.8
Carmarthen	8	3.3
Other centres		
Gorseinon	17	7.0
Cross Hands	5	2.1
Other	3	1.2
Total	242	100

Source: 1997 Residents' survey

The responses suggest that Llanelli only retains a dominant role as a clothes shopping centre. It remains relatively important as a main location for electrical, and furniture shopping, but was no longer significant as a destination for food and DIY shopping. 164 (55.8%) residents regarded Llanelli town centre as their main location for clothes' shopping, higher than the next most significant location, Swansea (92 or 31.3%). 127 (45.0%) and 66 (28.7%) residents respectively regarded Llanelli town centre as their main location for electrical and furniture shopping. The presence of several multiple electrical stores, and Pugh's, an independent furniture store of high quality, in the centre would partly explain this pattern. Relatively few residents regarded Llanelli town centre as their main location for food (21 or 7.1%), or for DIY (13 or 5.4%) shopping. This was almost certainly because of the lack of any major food or DIY stores in the town centre, and the dominance of Tesco and a range of DIY shops out of town in Trostre Retail Park (groceries, 178 or 60.1%; DIY, 170 or 70.2%). The relatively weak status of Llanelli as a shopping centre for most consumer goods, apart from clothes, suggests that the environmental improvements had not boosted Llanelli's retail strength.

The residents were also asked where they shopped *occasionally* for specific goods. 66 (28.6%) residents used the town centre occasionally for grocery shopping, showing that the centre retained a more significant role for "top-up" than it did for "main" food shopping. Similar findings emerged from a survey of residents at Ystalyfera (Bromley and Thomas 1995). 9 (12.5%) residents shopped occasionally for DIY goods in the centre. For clothes, furniture, and electrical goods the "top-up" role was less significant than the "main" shopping role.

In order to further explore whether the town centre was in decline, residents were asked if they had changed their main shopping location for specific goods. The greatest change related to grocery shopping, for which 60 (20.8%) residents indicated a change of location. The respective figures for other types of shopping were: clothes (22 or 7.9%), furniture (11 or 4.6%), DIY (15 or 6.5%), and electrical (14 or 5.1%). 56 residents provided information on their previous main location for grocery shopping. Of these, 23 (41.1%) indicated their previous main location was Llanelli town centre. This finding is not surprising given the closure of Tesco in the town centre, and its relocation out of town to Trostre Retail Park. Furthermore, the outcome is not unique to Llanelli; the growth of out of town retailing throughout the UK is well documented (Davies and Howard 1988; DOE 1994; Evans 1997; Fernie 1995 and 1998; Fuller Peiser 1997; Guy 1998a).

Shopping patterns within Llanelli town centre

In order to identify the patterns of shopping use within Llanelli town centre, the residents were asked how often they visited specified streets (Table 5.15). The majority of residents usually or always visited, Vaughan Street (264 or 92.9%), Stepney Street (237 or 84.6%), the indoor market (231 or 81.3%), and Cowell Street (154 or 55.0%). The popularity of Vaughan Street and Stepney Street was consistent with their location within the prime shopping area, but also might have reflected the public investment in environmental improvements in those streets. Though not in the prime area, the indoor market was well located in the central part of the town, and its traditional atmosphere would have contributed to its attractiveness. Cowell Street, located in the then secondary shopping area, maintained a degree of popularity which, again, may have partly been due to the environmental improvements in the northern part of that street.

The peripheral areas of the town were least popular. For example, the majority of residents never, or did not often visit, Market street (217 or 78.6%), Murray Street (213 or 76.7%), Upper Park/Park Street (185 or 66.8%), and John Street (179 or 63.9%). Apart from peripherality, these streets also suffered specific disadvantages, which might have explained their poor popularity. Upper Park/Park Street was very run down, and contained vacant and derelict properties. At the time of the survey, Murray Street and Market Street were severely affected by disruption due to the construction of the new shopping centre.

Table 5.15
Frequency of visiting specified streets in Llanelli

Street	n	Frequency % of respondents				
		Never	Not often	Sometimes	Usually	Always
Central precinct	277	18.1	25.3	28.5	22.4	5.8
Co-op Living store	281	5.7	16.0	31.3	28.8	18.1
Cowell Street	280	3.9	13.9	27.1	26.4	28.6
Indoor market	284	1.4	4.2	13.0	38.7	42.6
John Street	280	19.6	44.3	25.0	8.6	2.5
Market Street	276	42.4	36.2	13.0	4.7	3.6
Murray Street	278	24.5	52.2	14.7	5.4	3.2
Outdoor market	281	17.1	32.4	28.1	14.9	7.5
Stepney Street	280	1.4	4.6	9.3	29.6	55.0
Upper Park/Park Street	277	26.0	40.8	16.2	9.7	7.2
Vaughan Street	284	0	2.1	4.9	29.9	63.0

Source: 1997 Residents' survey

Note: Central Precinct formerly occupied the site of the St Elli shopping centre

In order to identify changing shopping patterns the residents were asked whether they visited some streets more or less than they used to (Tables 5.16-5.17). Residents most often mentioned Stepney Street (16 mentions), and Vaughan Street (12 mentions), as areas visited more often. They most often mentioned Upper Park Street (16 mentions), Market Street (9 mentions), and Murray Street (9 mentions), as areas visited less often. The relatively low number of mentions for specific streets suggests that the data should be treated cautiously. It also implies the degree of change in the level of use within the town centre was probably not great. The responses were, however, consistent with a marginal improvement in the vitality of the prime shopping area; and a decline in the more peripheral areas, and those affected most by the construction of the new shopping centre. The enhanced vitality of the prime areas may have been partly due to the environmental improvements within those areas, possibly re-enforced by the decline and disruption elsewhere.

Table 5.16

Streets visited more in Llanelli

Streets	No. of mentions
Stepney Street	16
Vaughan Street	12
Cowell Street	1
John Street	1
Other	9

Source: 1997 Residents' survey

Table 5.17

Streets visited less in Llanelli

Streets	No. of mentions
Upper Park Street	16
Market Street	9
Murray Street	9
Central Precinct	6
Cowell Street	4
Other	19

Source: 1997 Residents' survey

Pedestrian flow counts can also provide an indicator of vitality, although the value of comparison of flow count data over time can be diminished because of varying weather condition and the practical difficulties of counting flows accurately (DOE 1994, 1997b; Evans 1997). Data from field surveys carried out on Thursday 27th January 1997 and Saturday 22 March 1997 were compared with pedestrian counts carried out on Thursday 1st February 1990 and Saturday 27th January 1990 by the Building Design Partnership (Tables 5.18-5.19) (BDP, 1990). For each year ten minute counts, five minutes in each direction, were recorded each hour between 11 am and 3 pm for the same five locations. Overall counts were higher in 1997 than 1990, by 32% for Thursday and 31% for Saturday. The weather was wet and windy on the survey days in 1990. On the survey days in 1997 it was cold and dry on the Thursday, and mild, dry, and sunny at times on the Saturday.

Table 5.18

Comparison of pedestrian counts in Llanelli town centre (winter: Thursday)

Area	Streets	1990		1997		1990-1997	
		No.	%	No.	%	No.	%
Prime	Vaughan Street	582	22.5	976	28.7	+394	+67.7
	Stepney Street (East)	582	22.5	807	23.8	+226	+38.9
	Stepney Street (West)	609	23.6	751	22.1	+142	+23.3
Secondary	Cowell Street	531	20.6	424	12.5	-107	-20.2
Periphery	Park Street	280	10.8	438	12.9	+158	+56.4
Total		2583	100	3396	100	+813	+31.5

Source: 1990 BDP survey; Thursday, 1/2/90

1997 Field survey, Thursday, 30/1/97

Table 5.19

Comparison of pedestrian counts in Llanelli town centre (winter: Saturday)

Area	Streets	1990		1997		1990-1997	
		No.	%	No.	%	No.	%
Prime	Vaughan Street	896	25.0	1414	30.2	+518	+57.8
	Stepney Street (East)	862	24.1	1092	23.3	+230	+26.7
	Stepney Street (West)	872	24.3	1138	24.3	+266	+30.5
Secondary	Cowell Street	539	15.0	609	13.0	+70	+13.0
Periphery	Park Street	415	11.6	434	9.3	+19	+4.6
Total		3584	100	4687	100	+1103	+30.8

Source: 1990 BDP survey; Saturday, 27/1/90

1997 Field survey, Saturday, 22/3/97

Whilst the results of the pedestrian count analysis should be treated cautiously for reasons already mentioned, they are consistent with a marginal improvement in the vitality of the prime shopping area, especially Vaughan Street (+394 or 67.75%, Thursday; +518 or 57.8%, Saturday). The increase in pedestrian flows for Park Street (+158 or 56.4%, Thursday), was unexpected as it is in a peripheral area where residents appeared to be visiting less. In addition to the different weather conditions on the survey days in 1990 and 1997, the increase may also be partly explained by changes in the locality. First, the construction of the new car park and bus bays in the nearby Stepney Place might have encouraged higher usage of Park Street as a route through to the central areas of the town. Second, the then relocation of the outdoor market on Thursdays to Park Street, next to the former Tesco premises, might have increased flows along that street.

The main findings of the trader survey are presented and discussed in detail in the next chapter. However, traders' perceptions of the changing vitality of the town centre are relevant to the discussion of the changing use of the town centre in this chapter. To explore whether or not the vitality of the town centre had declined the traders were asked whether they considered the overall level of use by shoppers of the town centre, and their street or area, had changed since April 1992. Their responses are summarised in Table 5.20. The trader perception was of a decline in the vitality of the shopping centre. 86 traders (70.5%) reported decreased use of the town by shoppers. Only 6 traders (4.9%) reported increased use. There was a similar pattern of change for use of their street/area.

Table 5.20

Trader view on change of shopping use of Llanelli 1992-97

Use by shoppers 1992-1997	Use of town centre as a whole		Use of trader's street/ area	
	No.	% of respondents	No.	% of respondents
Less	86	70.5	78	63.9
No change	30	24.6	35	28.7
More	6	4.9	9	7.4
Total	122	100	122	100

Source: 1997 Trader survey

In order to explore whether the perceived change of use varied within the town, cross-tabulations were run between traders' views of the change of use of their street/area for shopping and the location of their outlet in terms of prime versus the secondary/peripheral area (Table 5.21). The Pearson Chi-Square test showed a significant difference at the 95% confidence level. 14 (48.3%) of traders located in the prime area thought that there were fewer people shopping in their area compared with 64 (68.8%) of traders who were located elsewhere. The trader survey, therefore, corroborates the earlier findings of the residents' and pedestrian count surveys that the vitality of the town centre may have marginally improved in the prime area, but had probably declined outside the central areas. The retail decline of peripheral areas, a process known as "compaction", is common to many other town centres in the UK (Williams 1991: 37; see also Ravenscroft 2000; Rowley 1993; URBED 1997).

Table 5.21

Trader change of use of street/area by location

Location of trader outlet	n	Change of use of street/area % of respondents		
		Fewer people shopping	More people shopping	Same no. of people shopping
Prime	29	48.3	17.2	34.5
Secondary/ periphery	93	68.8	4.3	26.9
Total	122	63.9	7.4	28.7

Above 95% confidence level

Chi-Square 6.922 df2 Significance 0.031

Source: 1997 Trader survey

Attitudes of the residents to attractions, accessibility and amenity

Experience elsewhere in the UK suggests that declining town centres can be revitalised by action to improve their attractions, accessibility, and amenity (DOE 1994). At the time of the residents' survey in 1997 most of the completed publicly funded works were of an environmental nature. The main new attraction, the St Elli shopping centre, was opened in November 1997 after the residents' survey was completed. The shopping patterns shown by the residents' survey suggest that in the period 1992-1997 the environmental or amenity improvements had a limited impact on addressing the overall decline of the town centre, but may have assisted increasing the vitality of the central area. If the town was still in overall decline at the close of 1992-97 there should be evidence of dissatisfaction with certain aspects of the town's attractions or accessibility which can critically affect town centre vitality and viability. On the other hand, if the public investment in environmental improvements was beginning to be effective there should be evidence of general residents' satisfaction with amenity in the town centre. Furthermore, an exploration of residents' attitudes to attractions and accessibility helps put their attitudes to amenity in context which is helpful in trying to disentangle the impact of changes to the environment from other aspects of revitalisation. The next section of the chapter explores residents' attitudes to attractions; subsequent sections consider residents' attitudes to accessibility and amenity.

Residents' attitudes to attractions

The range and quality of retail, leisure, cultural and other attractions can influence the health of a town centre (Baldock 1989; Bianchini 1995; DOE 1992; DOE 1994; Evans 1997; Jacobs 1961; Montgomery 1990). Residents were asked the extent to which they agreed with specific statements relating to changes to the attractions of Llanelli town centre, in relation to shopping and entertainment provision (Table 5.22). The statements in the questionnaire contained a mixture of favourable and unfavourable comments on the changes in the town to reduce the influence on responses. There was widespread agreement that shopping facilities had worsened, and entertainment facilities had not improved. 202 (69.7%) residents agreed or strongly agreed that the range of shops had worsened. 142 (48.8%) disagreed or strongly disagreed that entertainment facilities had improved.

Table 5.22
Residents' attitudes to changes to attractions in Llanelli

Statements regarding attractions	n	Attitudes % of respondents					
		Strongly agree	Agree	No strong feelings	Disagree	Strongly disagree	Don't know
The range of shops has worsened	290	19.7	50.0	10.3	18.6	0.7	0.8
Entertainment facilities have improved	291	0.3	5.8	21.3	38.1	10.7	23.7

Source: 1997 Residents' survey

An analysis of GOAD summary reports for September 1992 and December 1996 supports the residents' perception that the range of shops had worsened in the period prior to the trader survey (Table 5.23). According to GOAD in 1992 there were 259 convenience, comparison, and service outlets trading compared with 217 in 1996, a reduction of 42. The equivalent reduction in floorspace for the same categories of outlets was 62,200 sq ft. Some of this floorspace loss was a direct result of the public sector purchasing and demolishing property to make way for the new shopping centre. Whilst those purchases contributed to the town centre's decline in the short term they were a necessary pre-condition to the development of the new St Elli shopping centre, a fundamental element of action required to enhance Llanelli as a shopping destination.

Table 5.23

Change in number and area of outlets in Llanelli 1992-96

Type of outlet	1992		1996	
	No. of outlets	Area '000 sq ft	No. of outlets	Area '000 sq ft
Convenience	28	33.7	18	26.1
Comparison	147	305.1	129	278.6
Service	84	155.6	70	127.5
Sub-total	259	494.4	217	432.2
Other miscellaneous	4	12.5	3	15.6
Vacant and under construction	48	108.0	41	94.9
Grand total	311	614.9	261	542.7

Source: GOAD summary reports 1992 and 1996

The residents were also asked whether they were satisfied with the provision of specific attractions (Table 5.24). There was a high level of satisfaction with banks and building societies, and the indoor market. There was generally a great deal of dissatisfaction with shopping and entertainment facilities; especially foodstore provision, the outdoor market, and toilet facilities. Residents were respectively satisfied with banks and building societies (205 or 70.4%), and the indoor market (192 or 67.7%). Residents were dissatisfied or very dissatisfied with the range of shops (212 or 72.8%), variety stores (180 or 62.1%), and foodstores (241 or 83.4%). 124 (42.8%) residents were dissatisfied with the outdoor market. 197 (67.5%) were very dissatisfied with toilet facilities.

Table 5.24

Level of residents' satisfaction with attractions in Llanelli

Attractions	n	Level of satisfaction % of respondents				
		Very satisfied	Satisfied	Dissatisfied	Very dissatisfied	Don't know/ no view
Banks and building societies	291	26.1	70.4	1.0	0.3	2.1
Facilities for children	290	0	4.8	20.0	25.9	49.3
Foodstores	289	0.3	3.8	41.5	41.9	2.4
Indoor market	291	15.1	67.7	12.7	2.1	2.4
Outdoor market	290	1.0	25.9	42.8	16.6	13.8
Price of goods	290	0.3	37.2	38.6	2.8	21.0
Range of entertainment facilities	291	1.0	18.9	27.8	23.0	29.2
Range of shops	291	1.4	24.1	59.1	13.7	1.7
Restaurants and cafes	291	2.7	39.9	37.5	7.2	12.7
Street events	284	0.4	24.3	20.8	16.9	37.7
Toilet facilities	292	0	5.5	23.3	67.5	3.8
Variety stores	290	2.1	34.5	52.8	9.3	1.4

Source: 1997 Residents' survey

Overall the message was clear. There was a perceived decline in the attractions of the town centre, especially its shopping facilities. The majority of the residents were dissatisfied with shopping and other attractions; and were only satisfied with banks and building societies, and the indoor market.

The issue of whether the attitudes concerning attractions varied between the different types of residents was explored. Cross-tabulations were run between levels of satisfaction for specific attractions, and location and the different socio-economic variables. The Pearson Chi-Square test was then applied. There were some significant variations at the 95% confidence level in relation to levels of satisfaction with foodstores, restaurants and cafes, and variety stores. The findings suggest that there was a link between satisfaction with certain attractions and the socio-economic status of the residents. For example, those residents who were probably least wealthy such as the unemployed, students, or housewives, or the car-less, tended to be least dissatisfied with the shopping facilities, and the restaurants and cafes. A lower proportion of the unemployed, students and housewives were very dissatisfied or dissatisfied with foodstores (Table 5.25), range of shops (Table 5.26), variety stores (Table 5.27), and restaurants and cafes (Table 5.28), compared with other categories of residents.

Table 5.25

Satisfaction with foodstores in Llanelli by socio-economic status of resident

Type of resident	n	Level of satisfaction % of respondents	
		Very satisfied/ satisfied	Dissatisfied/very dissatisfied
Social class 1-2	61	6.6	93.4
Social class 3-5	83	13.3	86.7
Retired	100	16.0	84.0
Unemployed/house-wives*/students	19	36.8	63.2
Total	263	14.4	85.6

Above 95% confidence level

Chi-Square 11.072 df3 Significance 0.011

*Housewife in household where no one is in work

Source: 1997 Residents' survey

Table 5.26

Satisfaction with range of shops in Llanelli by socio-economic status of resident

Type of resident	n	Level of satisfaction % of respondents	
		Very satisfied/ satisfied	Dissatisfied/very dissatisfied
Social class 1-2	61	21.3	78.7
Social class 3-5	85	23.5	76.5
Retired	101	25.7	74.3
Unemployed/house-wives/students	20	55.0	45.0
Total	267	26.2	73.8

Above 95% confidence level

Chi-Square 9.654 df3 Significance 0.022

Source: 1997 Residents' survey

Table 5.27

Satisfaction with variety stores in Llanelli by socio-economic status of resident

Type of resident	n	Level of satisfaction % of respondents	
		Very satisfied/ satisfied	Dissatisfied/very dissatisfied
Social class 1-2	61	31.1	68.9
Social class 3-5	84	32.1	67.9
Retired	101	39.6	60.4
Unemployed/house-wives/students	21	66.7	33.3
Total	267	37.5	62.5

Above 95% confidence level

Chi-Square 9.897 df3 Significance 0.019

Source: 1997 Residents' survey

Table 5.28

Satisfaction with restaurants and cafes in Llanelli by socio-economic status of resident

Type of resident	n	Level of satisfaction % of respondents	
		Very satisfied/ satisfied	Dissatisfied/very dissatisfied
Social class 1-2	57	22.8	77.2
Social class 3-5	81	59.3	40.7
Retired	80	52.5	47.5
Unemployed/house-wives/students	19	68.4	31.6
Total	237	48.9	51.1

Above 95% confidence level

Chi-Square 22.321 df3 Significance 0.000

Source: 1997 Residents' survey

A lower proportion of the car-less (Table 5.29), and the unemployed (Table 5.30) were also very dissatisfied or dissatisfied with restaurants and cafes compared with car owners and those who were employed or retired. Perhaps the expectations of those who were better off, or those who had more choice, were higher than for those who were poorer, and or had less mobility. Similar findings also emerged from a survey of residents at Ystalyfera (Bromley and Thomas 1995).

Table 5.29

Residents' satisfaction with restaurants and cafes in Llanelli by car ownership

Type of resident	n	Level of satisfaction % of respondents	
		Very satisfied/ satisfied	Dissatisfied/very dissatisfied
With car	202	44.1	55.9
Without car	47	70.2	29.8
Total	249	49.0	51.0

Above 95% confidence level

Chi-Square 10.436 df1 Significance 0.001

Source: 1997 Residents' survey

Table 5.30

Satisfaction with restaurants and cafes in Llanelli by household employment characteristics

Type of household	n	Level of satisfaction % of respondents	
		Very satisfied/ satisfied	Dissatisfied/very dissatisfied
Household with 1+ adult in work	131	41.2	58.8
Household with no adult in work	15	66.7	33.3
Retired/other	95	54.7	45.3
Total	241	48.1	51.9

Above 95% confidence level

Chi-Square 6.230 df2 Significance 0.044

Source: 1997 Residents' survey

There was one other significant relationship. A higher proportion of Burry Port' residents were satisfied with variety stores (Table 5.31). There was no obvious explanation for that finding.

Table 5.31

Residents' satisfaction with variety stores in Llanelli by location

Location	n	Level of satisfaction % of respondents	
		Very satisfied/ satisfied	Dissatisfied/very dissatisfied
Burry Port	83	48.2	51.8
Llanelli	118	32.2	67.8
Llangennech	85	32.9	67.1
Total	286	37.1	62.9

Above 95% confidence level

Chi-Square 6.221 df2 Significance 0.045

Source: 1997 Residents' survey

There were no significant relationships at the 95% confidence level between the selected variables and satisfaction with banks and building societies, facilities for children, the indoor and outdoor markets, range of entertainment facilities, street events, and toilet facilities. This shows that the attitudes of the different types of residents in the three locations were consistent for those attractions.

With the exception of the unemployed, students, and housewives, the residents in all three locations were generally dissatisfied with critical attractions affecting vitality such as shopping (foodstores, range of shops, variety stores), and entertainment facilities.

Despite the public investment in amenity improvements the residents were generally dissatisfied with the town as a shopping destination, due largely to the poor range of shops and the absence of a foodstore, and other facilities. This dissatisfaction was a further indicator suggesting the town centre was probably still in decline in 1997, and emphasises the need for attractions as the cornerstone of town centre revitalisation in Llanelli.

Residents' attitudes to accessibility

Accessibility is a factor that can influence the retail strength of a town centre (Bromley and Thomas 1993b; DOE 1994; Evans 1997; URBED 1999). The main changes to Llanelli town centre's accessibility to the wider region were the opening of the Coastal Link Road through South Llanelli in 1995, and the A484 Link Road from Trostre to Loughor Bridge in 1993. Whilst the Coastal Link Road was designed to open up development sites within South Llanelli it also had the effect of "by-passing" the town, thereby providing an alternative route for through traffic. The residents were asked whether they agreed with specific propositions concerning the effect of the opening of the Coastal Link Road and the A484 on the use of Llanelli town centre for shopping (Tables 5.32-5.33). Again, the statements presented in the questionnaire contained a mixture of favourable and unfavourable comments on the changes in the town to reduce any influence on their responses. The perceived impact of the road openings on shopping use was not great. 209 (70.6%) and 203 (69.0%) respectively thought their shopping in the town was unchanged as a result of the road infrastructure. The majority of the residents who thought there was an impact, believed they used the town less often for shopping. 11 residents thought they shopped more often compared with 20, who thought they shopped less often, as a consequence of the opening of the Coastal Link Road. 15 residents thought they shopped more often compared with 20, who thought they shopped less often, because of the opening of the A484.

Table 5.32

Perceived effect of Coastal Link Road on shopping in Llanelli town centre

Resident's view	No.	% of respondents
Same	209	70.6
Less often	20	6.8
More often	11	3.7
Don't know	56	18.9
Total	296	100

Source: 1997 Residents' survey

Table 5.33

Perceived effect of A484 on shopping in Llanelli town centre

Resident's view	No.	% of respondents
Same	203	69.0
Less often	20	6.8
More often	15	5.1
Don't know	56	19.0
Total	294	100

Source: 1997 Residents' survey

Shopping convenience can also be influenced by factors that affect accessibility within town centres. To explore this further, the residents were asked whether they thought the opening of the Coastal Link Road had helped reduce congestion in the town centre (Table 5.34). 170 (57.4%) residents thought congestion was reduced, which indicates that the town centre might have benefited from the construction of the road.

Table 5.34

Perceived effect of coastal link road on traffic congestion in Llanelli town centre

Resident's view	No.	% of respondents
Less congestion	170	57.4
Not less congestion	47	15.9
Don't know	79	26.7
Total	296	100

Source: 1997 Residents' survey

In order to further consider the impact of changes the residents were asked the extent to which they agreed with specific statements relating to changes in relation to car parking, and bus stop provision (Table 5.35). Again, the statements contained a mixture of favourable and unfavourable comments on the changes in the town to reduce any influence on their responses. The key message was that 167 (57.8%) residents, a significant majority, agreed or strongly agreed that despite new car parking provision, car parking remained inadequate. Only 82 (28.2%) thought the car parks had helped attract more shoppers to the town. This finding probably reflects the fact that whilst the public investment in upgrading the multi-storey car park and in the Stepney Place car park improved amenity, it did not result in a net increase in the number of car parking spaces available in the town. The requirement for adequate car parking to serve town centre shopping areas is well documented (Bromley and Thomas 1993b; DOE 1994; Guy 1998b; Lockwood 1997b; Page and Hardyman 1996; URBED 1999; Williams 1991).

Table 5.35
Residents' attitudes to changes to accessibility in Llanelli

Statements regarding accessibility	n	Attitudes % of respondents					
		Strongly agree	Agree	No strong feelings	Disagree	Strongly disagree	Don't know
Despite the new car parking provision, car parking remains inadequate	289	17.0	40.8	8.0	14.9	1.4	18.0
The car parks have helped attract more shoppers to the town	291	2.4	25.8	15.8	22.3	3.1	30.6
The multi-storey car park over the market is no better than it was	291	5.2	16.2	11.0	23.0	5.2	39.5
The new bus stops are well located	291	3.8	30.6	8.6	6.2	1.7	49.1
The new Stepney Place car park is badly located	289	2.4	15.2	8.7	38.8	5.5	29.4

Source: 1997 Residents' survey

The residents were also asked the degree to which they were satisfied with other specific matters relating to the town's accessibility (Table 5.36). There was a high level of satisfaction with pedestrian access within the town, and with ease of access to the town centre by car, but less satisfaction with car parking provision. 224 (77.5%) residents were satisfied with the extent of pedestrian access, 200 (69.9%) residents with ease of access by car, and 124 (42.8%) satisfied with car parking.

Table 5.36

Level of residents' satisfaction with accessibility to Llanelli

Accessibility	n	Level of satisfaction % of respondents				
		Very satisfied	Satisfied	Dissatisfied	Very dissatisfied	Don't know /no view
Car parking	290	2.4	42.8	32.1	9.7	13.1
Direction signs	290	3.1	39.7	17.2	4.1	35.9
Ease of access by car	286	1.4	69.9	14.3	3.8	10.5
Ease of access by public transport	290	3.1	38.3	7.9	2.1	48.6
Extent of pedestrian areas	289	10.0	77.5	9.3	2.1	1.0

Source: 1997 Residents' survey

It is also important to explore whether the attitudes concerning accessibility were consistent between the different types of residents. Cross-tabulations were run between levels of satisfaction with specific accessibility issues, and location and the different socio-economic variables. The Pearson Chi-Square test was then applied. There were some significant variations at the 95% confidence level in relation to levels of satisfaction with car parking, and ease of access to the town centre by car, and public transport.

A lower proportion of retired/other residents were very dissatisfied or dissatisfied with car parking; those residents living in homes with at least one adult in work were least satisfied (Table 5.37). A higher proportion of residents who were in social class 1-2, were very dissatisfied or dissatisfied with ease of access by public transport compared with other categories of residents (Table 5.38). Again, this might have reflected a theme noted earlier in relation to attractions, which was that the expectations of those who were probably better off may have been higher than those who were poorer.

Table 5.37

Satisfaction with car parking in Llanelli by household employment characteristics

Type of household	n	Level of satisfaction % of respondents	
		Very satisfied/ satisfied	Dissatisfied/very dissatisfied
Household with 1+adult in work	133	44.4	55.6
Household with no adult in work	15	53.3	46.7
Retired/other	91	61.5	38.5
Total	239	51.5	48.5

Above 95% confidence level

Chi-Square 6.405 df2 Significance 0.041

Source: 1997 Residents' survey

Table 5.38

Satisfaction with ease of access by public transport in Llanelli by socio-economic status of resident

Type of resident	n	Level of satisfaction % of respondents	
		Very satisfied/ satisfied	Dissatisfied/very dissatisfied
Social class 1-2	34	61.8	38.2
Social class 3-5	42	83.3	16.7
Retired	50	88.0	12.0
Unemployed/house-wives/students	13	84.6	15.4
Total	139	79.9	20.1

Above 95% confidence level

Chi-Square 9.478 df3 Significance 0.024

Source: 1997 Residents' survey

There were also variations in the level of satisfaction with car parking and age composition (Table 5.39), but there was no obvious reason for the pattern that showed greatest dissatisfaction amongst those residents from households with a mixed age composition of under 60 and 60+.

Table 5.39

Satisfaction with car parking in Llanelli by age composition of households

Age composition of households	n	Level of satisfaction % of respondents	
		Very satisfied/ satisfied	Dissatisfied/very dissatisfied
Adult(s)+child(ren) Under 16	48	47.9	52.1
All aged 16-59	78	51.3	48.7
Mix of under 60 and over 60+	22	27.3	72.7
All 60+	89	60.7	39.3
Total	237	51.9	48.1

Above 95% confidence level

Chi-Square 8.407 df3 Significance 0.038

Source: 1997 Residents' survey

Finally, a higher proportion of residents living in homes with no adult in work, were very dissatisfied or dissatisfied with ease of access by car (Table 5.40). Perhaps this reflected a frustration related to restricted mobility due to the financial constraints often associated with unemployment.

Table 5.40

Satisfaction with ease of access by car in Llanelli by household employment characteristics

Type of household	n	Level of satisfaction % of respondents	
		Very satisfied/ satisfied	Dissatisfied/very dissatisfied
Household with 1+ adult in work	136	76.5	23.5
Household with no adult in work	14	57.1	42.9
Retired/other	94	87.2	12.8
Total	244	79.5	20.5

Above 95% confidence level

Chi-Square 8.512 df2 Significance 0.014

Source: 1997 Residents' survey

There were no significant relationships at the 95% confidence level between the selected variables and satisfaction with direction signs and extent of pedestrian areas. This shows that the attitudes of the respondents in the three locations were consistent for those accessibility matters.

With the exception of car parking, which requires further attention to assist revitalisation, accessibility issues did not emerge as a significant constraint on the revitalisation of the town centre. On the contrary, the extent of pedestrianised areas, improved with public investment, was a strength that was recognised with high levels of consumer satisfaction. The residents were also generally more satisfied with factors relating to accessibility than they were in relation to key attractions most critical to town centre vitality. For example, 121(41.8%) residents were dissatisfied or very dissatisfied with car parking compared with 212 (72.8%) dissatisfied with the range of shops, and 241 (83.4%) with foodstores.

Residents' attitudes to amenity

The amenity of a town centre reflects the extent to which it presents a pleasant, clean, well maintained and secure environment (DETR 2000b; DOE 1994; Evans 1997; Smith 1974; URBED 1999). If the public investment in environmental improvements in Llanelli was effective there should be evidence of general residents' satisfaction with amenity in the town centre. The residents' survey provided evidence that the changes had resulted in a perceived improvement to the appearance of the town centre, and general satisfaction with the shopping environment.

The residents were asked the extent to which they agreed with specific statements relating to changes to the amenity of Llanelli town centre (Table 5.41). Again, the statements contained a mixture of favourable and unfavourable comments on the changes in the town to reduce influence on the responses. 181 (62.0%) residents agreed or strongly agreed that the appearance of streets in the town centre had been improved. 159 (54.5%) residents agreed or strongly agreed the new Stepney Place car park had a pleasant appearance. The majority of residents were, therefore, aware of a general improvement to the appearance of the town centre. Fewer residents (113 or 39.2%) agreed that the changes resulted in a more pleasant shopping experience. Two factors probably explain this. Firstly, there was disruption caused by construction works. Secondly, the works to the public realm did not increase the range of shops in the town, a key deficiency of the town at the time of the survey. There was also some concern that the changes in the town had adversely affected safety in the streets. 79 (27.3%) residents thought the streets felt less safe, a majority excluding don't knows and no strong feelings.

The residents were also asked the degree to which they were satisfied with specific amenities (Table 5.42). The majority of residents were satisfied or very satisfied with street cleaning (206 or 70.8%), attractiveness of shopping environment (174 or 60.0%), condition of buildings (175 or 60.6%), crime prevention measures (158 or 54.3%), and lighting (152 or 52%). Whilst fewer residents were satisfied with feeling of safety (110 or 37.9%), a majority were very satisfied or satisfied, excluding don't knows or no strong feelings. This finding is of relevance because other UK research suggests that fear of safety can adversely affect the vitality of town centres (Oc and Tiesdale 1997a).

Table 5.41
Residents' attitudes to changes to amenity in Llanelli

Statements regarding amenity	n	Attitudes % of respondents					
		Strongly agree	Agree	No strong feelings	Disagree	Strongly disagree	Don't know
Shopping is a more pleasant experience	288	6.6	32.6	17.0	30.2	11.5	2.1
The appearance of the streets has been improved	292	9.9	52.1	8.6	21.9	6.8	0.7
The new bus stops are badly designed	291	6.2	13.1	13.1	15.8	1.0	50.9
The new Stepney Place car park has a pleasant appearance	292	3.1	51.4	7.2	7.9	2.1	28.4
The streets feel less safe	289	4.5	22.8	28.7	17.6	1.7	24.6

Source: 1997 Residents' survey

Table 5.42

Level of residents' satisfaction with amenity in Llanelli

Amenity	n	Level of Satisfaction % of respondents				
		Very satisfied	Satisfied	Dissatisfied	Very dissatisfied	Don't know/ no view
Attractiveness of shopping environment	290	2.8	57.2	26.9	10.3	2.8
Condition of buildings	289	2.8	57.8	29.1	5.2	5.2
Crime prevention measures	291	1.7	52.6	22.0	8.6	15.1
Feeling of safety	290	1.0	36.9	26.2	9.0	26.9
Lighting	292	2.7	49.3	7.5	2.4	38.0
Street cleaning	291	5.2	65.6	16.8	7.9	4.5

Source: 1997 Residents' survey

To explore whether the attitudes concerning amenity were consistent between the different types of residents, cross-tabulations were run between levels of satisfaction with specific amenities, and location and the different socio-economic variables. The Pearson Chi-Square test was then applied. There was one significant variation at the 95% confidence level. A higher proportion of Llanelli residents were very dissatisfied or dissatisfied with the attractiveness of the shopping environment (Table 5.43). Perhaps the Llanelli residents were more aware of the disruption caused by the construction of the environmental improvements and the new shopping centre, because they lived nearer the town. Alternatively, they may have been better informed of the changes to the town, and a higher proportion took the view they were dissatisfied with the completed works. Whatever the underlying reasons for these differences, the majority of residents in each location were satisfied or very satisfied with the attractiveness of the shopping environment.

Table 5.43

Residents' satisfaction with attractiveness of the shopping environment in Llanelli by location

Location	n	Level of satisfaction % of respondents	
		Very satisfied/ satisfied	Dissatisfied/very dissatisfied
Burry Port	83	69.9	30.1
Llanelli	117	51.3	48.7
Llangennech	82	68.3	31.7
Total	282	61.7	38.3

Above 95% confidence level

Chi-Square 9.232 df2 Significance 0.010

Source: 1997 Residents' survey

There were no significant relationships at the 95% confidence level between the selected variables and satisfaction with street cleaning, lighting, the condition of buildings, crime prevention measures, and feeling of safety. This shows that the attitudes of the different types of residents in the three locations were consistent for those amenities.

The generally high levels of satisfaction with the amenity of the town centre, and the residents' recognition of the improvement in the appearance of the streets suggests a positive outcome of the public investment in the town centre. There was also external and independent recognition of a positive change in the town centre. The up-grade of Lucania Buildings won a Civic Trust award in 1995/96 (Carmarthenshire County Council/WDA d). The environmental improvements won a national Civic Trust award in 1996/7, the scheme being "one of only 38 projects in the UK to achieve a special mention, a category for design projects of specific benefit to the local community" (Carmarthenshire County Council/WDA d; Civic Trust Press release 18 April 1997). Such high levels of satisfaction with amenity improvements are not unique to Llanelli, and have been identified in other UK surveys (DOE 1997a).

Residents' attitudes to town centre management

Town centre management has been championed as an important component of town centre revitalisation (DOE 1994; DOE 1997a; DETR 1996; Medway *et al*. 1998; Oc and Tiesdale 1997a). Residents were fairly evenly divided with regard to their satisfaction with the management of Llanelli town centre. 104 (35.7%) were satisfied or very satisfied, compared with 105 (36.1%) who were dissatisfied or very dissatisfied. 82 (28.2%) said they did not know, or held no view on the issue. Chi-Square testing of cross-tabulations showed that the residents' responses varied in relation to attitudes towards town centre management. The elderly residents (Table 5.44) and those who were retired (Tables 5.45 and 5.46) were least dissatisfied with town centre management. The unemployed (Table 5.45) and those residents who were aged 16-59 (Table 5.44) were most dissatisfied with town centre management. The greater degree of dissatisfaction by the unemployed may have reflected a frustration that the environmental changes in the town centre had done little to directly address their difficulties, especially the creation of new job opportunities. As will be discussed further in the next chapter, following the residents' survey steps were taken to improve the management of the town centre.

Table 5.44

Satisfaction with town centre management in Llanelli by age composition of household

Age composition of households	n	Level of satisfaction % of respondents	
		Very satisfied/ satisfied	Dissatisfied/very dissatisfied
Adult(s)+child(ren) Under 16	35	45.7	54.3
All aged 16-59	65	33.8	66.2
Mix of under 60 and over 60+	22	54.5	45.5
All 60+	78	60.3	39.7
Total	200	48.5	51.5

Above 95% confidence level

Chi-Square 10.335 df3 Significance 0.016

Source: 1997 Residents' survey

Table 5.45

Satisfaction with town centre management in Llanelli by type of household

Type of household	n	Level of satisfaction % of respondents	
		Very satisfied/ satisfied	Dissatisfied/very dissatisfied
Household with 1+adult in work	111	45.9	54.1
Household with no adult in work	12	8.3	91.7
Retired/other	80	60.0	40.0
Total	203	49.3	50.7

Above 95% confidence level

Chi-Square 12.221 df2 Significance 0.002

Source: 1997 Residents' survey

Table 5.46

Satisfaction with town centre management in Llanelli by socio-economic status of resident

Type of resident	n	Level of satisfaction % of respondents	
		Very satisfied/ satisfied	Dissatisfied/very dissatisfied
Social class 1-2	47	53.2	46.8
Social class 3-5	67	41.8	58.2
Retired	71	59.2	40.8
Unemployed/house-wives/students	13	23.1	76.9
Total	198	49.5	50.5

Above 95% confidence level

Chi-Square 8.128 df3 Significance 0.043

Source: 1997 Residents' survey

Residents' views of the future of the town centre

In order to explore whether the changes to the town had brought greater confidence in the future of the centre the residents were asked whether they agreed with specific statements (Table 5.47). There was evidence of general confidence in the future, which implied recognition that the town had begun a recovery in its fortunes. 219 (78.5%) of residents agreed that they had a greater confidence in the town and its prospects for future improvement. Only 7 (2.5%) residents thought the centre would continue to decline.

Table 5.47

Residents' view of future of Llanelli town centre

Statements	No.	% of respondents
Greater confidence and prospects of further improvements	219	78.5
Pace of decline slowed, unlikely to be lasting improvement	53	19.0
Centre will continue to decline	7	2.5
Total	279	100

Source: 1997 Residents' survey

Residents' views on future requirements to improve the town

Residents were asked the ways in which they thought the town centre could be improved in order to consider which changes were most critically required to enhance the town centre as a shopping destination. The suggested improvements mentioned at least 3 times are set out in Table 5.48. The top five mentions were a desire for a better range of shops, toilet provision, more facilities for the young, more entertainment facilities, and improved facilities for the disabled. These views were broadly consistent with those relating to levels of satisfaction with the town, referred to earlier in the report. They support the view that the priority order for action to improve the town as a shopping destination relates to the need for better attractions, especially a better range of shops. The perceived importance of retail attractions as a component of a healthy town centre has also been identified in other UK surveys (Evans 1997; Page and Hardyman 1996).

Table 5.48

Ways to improve the town

Ways to improve town	No. of mentions
Better range of shops	89
Provide toilets	28
More facilities for young	24
More entertainment facilities	19
Improve facilities for the disabled	18
Improve security	17
Improve remaining run-down areas	16
More/free parking	15
More restaurants/tea/coffee shops	12
Complete shopping centre	9
Better/free public transport	8
Clean town better	8
Improve character	4
Improve open air market	4
Demolish former Tesco building	3

Source: 1997 Residents' survey

Other responses by the residents confirmed the relative importance they placed on attractions as opposed to improvements in accessibility and amenity. The residents were asked to rank 1-10 (1 being least and 10 being most beneficial) the benefits of different types of completed investment to shoppers in the town centre. The mean rank was 6.22 for environmental works, 7.01 for roads, car parks and bus stops, and 8.01 for the new shopping centre (Table 5.49).

Table 5.49

Residents' ranking of benefits of different investments in Llanelli

Type of investment	n	Mean rank of benefits
Environmental works	288	6.22
Roads, car parks, bus stops	286	7.01
New shopping centre.	285	8.01

Source: 1997 Residents' survey

This supports the view that the priority order for action to improve the town as a shopping destination relates to attractions (new shopping centre), accessibility (roads, car parks, bus stops), and amenity (environmental works).

Conclusions

This chapter has looked at the functional roles of Llanelli town centre, and explored the way it is used for shopping by residents living in the town and its surrounding areas. It also explored how the use of the town centre has changed, with a particular view of identifying the impact of public investment on its vitality. Overall, the use of the town may have declined, but changes in the level of use of the town varied in different locations. Some central areas such as Vaughan Street probably maintained, or possibly marginally increased, their vitality. The generally high level of the residents' satisfaction with the amenity of the town centre, and the recognition by the residents that the appearance of the streets had been improved, suggests a positive outcome of the public investment in the town centre. The Civic Trust awards for the environmental improvements lend weight to that proposition. However, the perceived decline in the range of shops and concerns over car parking, implies that the development of new shopping attractions and car parking facilities were also critical requirements. Environmental improvements, without attractions, were insufficient to reverse the overall decline in the town centre. They may, however, have contributed to safeguarding or enhancing the vitality of the central parts of the town. The improvements, and the plans for a new shopping centre, were also probably the reasons why most of the residents expressed confidence in the town's future in 1997.

The research also showed interesting differences in the views of different types of residents and households in relation to satisfaction with certain facilities in the town centre. The implication was that the younger, more mobile or prosperous residents had higher expectations with lower levels of satisfaction in relation to, for example, shopping facilities, restaurants and cafes.

Whilst an understanding of residents' views is important as they are consumers using the town centre, the Llanelli town centre traders are also key stakeholders who were affected by changes to the town centre. It is to an exploration of the trader perspectives that we now turn.

Chapter 6

Trader perspectives on Llanelli town centre

Introduction

The previous chapter looked at the functional roles of Llanelli town centre, the way it is used by residents, and the impact of public investment. This chapter explores trader perspectives on the impact of public investment on trade, employment, private investment and benefits to business. It also explores trader satisfaction with the town in 1997 and their attitudes to changes in the town 1992-97. It draws mainly on a survey of traders that was carried out over the period February to August 1997 (see chapter 4), but also from interviews with the developer and the funder of the St Elli shopping centre.

Trade

A principal aim of the trader survey was to explore changing patterns of trading in the years prior to 1997 and to attempt to identify any relationship with public investments in the town. As part of this exploration, the traders were asked the extent to which their turnover and profitability had changed, in real terms, between February 1992 and February 1997. Those able and willing were also asked to indicate the percentage of any change. Table 6.1 provides information on the turnover and profitability reported. The results imply that overall the town centre was probably still in decline in 1997, with 36 (39%) businesses reporting reductions in turnover and 37 (39%) in profitability in the previous five years compared with respectively 30 (32.2%) and 22 businesses (23%) who reported increased turnover and profitability. Llanelli was not, however, unique in facing difficult trading conditions in the early to mid 1990s. Lockwood (1996) found that 60% of the 323 high street stores surveyed across 46 UK towns failed to record real turnover growth in the period 1990-95 (Lockwood 1996: 2).

Table 6.1

Turnover and profitability change of traders in Llanelli 1992-97

Change 1992-1997	Turnover		Profitability	
	No.	% of respondents	No.	% of respondents
Significantly lower	10	10.8	8	8.3
Lower	26	28.0	29	30.2
No change	19	20.4	26	27.1
Higher	23	24.7	18	18.8
Significantly higher	7	7.5	4	4.2
Don't know	8	8.6	11	11.5
Total	93	100	96	100

Source: 1997 Trader survey

Table 6.2 provides information on the percentage change of turnover and profitability reported. The results should be treated cautiously since only 36 and 28 traders disclosed figures respectively for the percentage of turnover and profitability change. It appears, however, that the changes may have been significant in some cases. For example, 10 traders reported increases of turnover in the 10-19% range; and 12 traders reported a decrease of turnover in the 20-30% range.

Table 6.2

Turnover and profitability change bands: traders in Llanelli 1992-97

% Change 1992-1997	Turnover		Profitability	
	No.	% of respondents	No.	% of respondents
Increase 0-9%	1	2.8	5	17.9
Increase 10-19%	10	27.8	2	7.1
Increase 20-30%	3	8.3	3	10.7
Increase of over 30%	3	8.3	2	7.1
Decrease 0-9%	2	5.6	3	10.7
Decrease 10-19%	3	8.3	1	3.6
Decrease 20-30%	12	33.3	9	32.1
Decrease of over 30%	2	5.6	3	10.7
Total	36	100	28	100

Source: 1997 Trader survey

To explore whether the changes in turnover varied between the different types of traders throughout the town, cross-tabulations were run between turnover change and type, size, and location of outlets. The application of the Pearson Chi-Square test identified two significant relationships at the 95% confidence level. Firstly, there was a relationship between turnover change and size of outlet (Table 6.3). The larger shops of 2500 sq ft size and over performed better in terms of turnover increase. 11 traders (61.1%) reported increased turnover in shops of 2500 sq ft and over compared with 12 (30.8%) in shops of 1000-2499 sq ft and 7 (25%) in shops of under 1000 sq ft. Secondly, shops in the prime area also performed better than shops in other areas (Table 6.4). 13 traders (65%) in prime areas reported increased turnover compared with 3 (15%) in secondary and 14 (31.1%) in peripheral areas. It was the larger shops and those in prime areas that performed best. The higher turnover in the prime areas was probably a consequence of higher use of this area of the town by shoppers, but it might also reflect a national retail trend involving a "shift to larger retail outlets and closure of smaller shops" (Carley *et al.* 2001: 11). The relatively poor performance of shops in secondary areas compared with the peripheral area was unexpected. This was probably partly due to disruption resulting from the area's location close to the construction site of the St Elli shopping centre. The retail decline of peripheral areas in a process known as "compaction" is not unique to Llanelli and has been identified in other UK town centres (Williams 1991: 37; see also Ravenscroft 2000; Rowley 1993; URBED 1997).

Table 6.3

Real turnover change by size of outlet in Llanelli 1992-97

Size of outlet	Turnover 1992-1997 % of respondents		
	n	Lower/significantly lower/no change	Higher/significantly higher
Under 1000 sq. ft	28	75.0	25.0
1000-2499 sq. ft	39	69.2	30.8
2500 sq. ft and over	18	38.9	61.1
Total	85	64.7	35.3

Above 95% confidence level

Chi-Square 6.902 df 2 Significance 0.032

Source: 1997 Trader survey

Table 6.4

Real turnover change by location of outlet in Llanelli 1992-97

Location of outlet	Turnover 1992-1997 % of respondents		
	n	Lower/ significantly lower/ no change	Higher/significantly higher
Prime	20	35.0	65.0
Secondary	21	85.0	15.0
Periphery	45	68.9	31.1
Total	85	64.7	35.3

Above 95% confidence level

Chi-Square 11.680 df 2 Significance 0.003

Source: 1997 Trader survey

Data from the trader survey were also analysed to explore the extent to which the public investment in changes of an environmental nature influenced the changing patterns of turnover, employment, private investment and benefits to business in Llanelli town centre. Possible impact on turnover is discussed first; impact on employment, private investment and benefits to business is discussed later in the chapter. It was thought that the environmental changes were likely to have a highly localised impact. The town was, therefore, divided into areas where the environment had been improved by the public sector as part of the town centre revitalisation programme and those areas that remained unimproved. Improved areas were defined as the northern part of Cowell Street, Lucania Buildings, Stepney Arcade, Stepney Street, Stepney Precinct, and Vaughan Street; all of which had their environment enhanced through public investment. The unimproved areas were the remaining parts of the town centre covered by the 1996 GOAD plan, including the area of the St Elli shopping centre, which was under construction at the time of the trader survey (see Fig 3).

The first stage of the analysis was to compare turnover change in improved and unimproved areas. The possible relationship between improved and unimproved areas and turnover change was explored by cross-tabulation and Chi-Square testing. A significant relationship at the 95% confidence level was identified (Table 6.5). The improved areas performed best in terms of turnover change. 17 (48.6%) traders in the improved areas reported higher/significantly higher turnover compared with 13 (26.0%) in the unimproved areas. On the face of it, this implied the improvements might have positively influenced turnover performance, in line with the findings of other UK surveys (DOE 1988; DOE 1997a). The improved area, however, largely coincided with the prime retail area, and the area where most of the larger stores were concentrated.

Table 6.5

Real turnover change in improved and unimproved areas in Llanelli 1992-97

Area	n	Real turnover change 1992-1997 % of respondents	
		Lower/significantly lower/no change	Higher/significantly higher
Improved	35	51.4	48.6
Unimproved	50	74.0	26.0
Total	85	64.7	35.3

Above 95% confidence level

Chi-Square 4.593 df1 0.032

Source: 1997 Trader survey

To explore further the possible effects of the improvements the traders were asked whether they thought their turnover was different in February 1997 than it would have been if works to Vaughan Street, Stepney Street, and the multi-storey car park above the market had not been completed (Table 6.6). 54 (49.5%) traders in Vaughan Street and 48 (43.6%) in Stepney Street, thought that the completion of the works had made no difference to their turnover. Only 5 (4.6%) traders in Vaughan Street and 8 (7.3%) in Stepney Street thought their turnover was higher or much higher than it would otherwise have been. 17 (15.8%) and 20 (18.2%) traders, respectively for those streets, thought it was lower or much lower than it would have been without the completion of the works.

The pattern of responses for the multi-storey car park was similar but with a slightly higher percentage (11%) believing the works resulted in a higher turnover than if the works had not been completed. The perceived impact of the environmental improvements on turnover was not great.

Table 6.6

Effect of completed works on turnover in Llanelli

Area	n	Effect of completed works on turnover % of respondents					
		Much lower	Lower	Same	Higher	Much higher	Don't know
Market multi-storey car park	109	2.8	11.9	45.0	11.0	0	29.4
Stepney Street	110	1.8	16.4	43.6	6.4	0.9	30.9
Vaughan Street	109	0.9	14.7	49.5	3.7	0.9	30.3

Source: 1997 Trader survey

The perceived lack of impact of environmental improvements on business turnover was also supported by consideration of reasons given by traders for turnover change. Respondents who had reported turnover change, were asked why they thought that change had happened. Tables 6.7 and 6.8 list the responses mentioned at least 3 times. The most frequently mentioned reasons for turnover increase were better management (7 mentions) and improved product range (5 mentions). The most frequently mentioned reasons for turnover decrease were less business/fewer shoppers (12 mentions) and changes to the town centre (9 mentions). A minority of traders believed the disruptive effect of the construction phases of works in the town was responsible for the turnover decreases, a common complaint noted in other town centres the subject of physical change (DOE 1997a; Lockwood 1997b).

Table 6.7

Reasons for turnover increase

Reason for turnover increase	No. of mentions
Better management	7
Better product range	5
Property improved	3

Source: 1997 Trader survey

Table 6.8

Reasons for turnover decrease

Reason for turnover decrease	No. of mentions
Less business/fewer shoppers	12
Changes to town centre	9
Shop closures	6
Out of town shops	4
Run down town/parts of town	4

Source: 1997 Trader survey

There was, therefore, some evidence to suggest that overall trade in Llanelli town centre was in decline in 1997. More traders reported real reductions in turnover and profitability over the period 1992-97, than reported increases. Patterns of turnover change varied in different locations. Outside the prime and the improved areas only a minority of traders claimed that their turnover was higher in 1997 than it was in 1992. The most commonly cited reason for turnover decrease was less business/fewer shoppers, changes to the town centre, and shop closures. Most of the traders in the larger shops and those located in the prime areas claimed real turnover increases. Proportionately more traders in the improved areas reported higher turnover than those located elsewhere. This suggests that the improved central areas traded relatively well 1992-97, although overall the town centre was probably in decline, a situation facing many other UK towns and cities (DOE 1992; DOE 1994; Bromley and Thomas 1995; Thomas and Bromley 1995; URBED 1997).

It would, however, be wrong to conclude that the changes to the Llanelli town centre's environment had caused the turnover increases in the central areas, as other factors may have been at play. Certainly, the perceived impact was not great at the time of the trader survey in 1997. For example, only a small number of traders thought that their turnover was higher because of the works to Stepney Street, Vaughan Street and the multi-storey car park. Furthermore, the most commonly cited reasons given by traders for turnover increase in the town centre were better management and an improved product range as opposed to changes in the external environment, although the responses should be treated with caution because they were relatively small in number.

Employment

The traders were asked to provide information on employment change between 1992 and 1997, in order to provide a further indicator of whether or not the town was still in decline. A majority of traders responded to the question. The results are set out in Table 6.9. More businesses reported a reduction in numbers employed compared with those who reported increases and, overall, there was a small net decline in employment during that period. 20 (21.1%) businesses reported increased employment compared with 30 (31.6%) who indicated decreased employment. 93 businesses were able to provide employment figures for 1992 and 1997. Those businesses employed 616 in 1992, compared with 582 in 1997, a net reduction of 34 jobs over the five year period. The employment loss may have reflected lower turnover in the town, or a more efficient use of staff resource.

Table 6.9

Employment change in Llanelli 1992-97

Employment change 1992-1997	No.	% of respondents
Remained the same	45	47.4
Decreased	30	31.6
Increased	20	21.1
Total	95	100

Source: 1997 Trader survey

There was also a shift towards part-time employment 1992-97 (Table 6.10). 28 (30.8%) traders reported an increase in part-time employment in the five years to 1997, compared to 13 (14.3%) who reported a decrease. These findings are consistent with national trends based on estimates that UK retail employment declined from 2.9m in 1961 to 2.1m in 1992 with a proportionate increase in part time jobs from 28% in 1961 to 47% in 1992 (Kirby 1993: 197). The displacement of full-time by part-time employment has also been noted by Montgomery (1990).

Table 6.10

Part-time employment change in Llanelli 1992-97

Employment change 1992-1997	No.	% of respondents
Remained the same	50	54.9
Increased	28	30.8
Decreased	13	14.3
Total	91	100

Source: 1997 Trader survey

To explore whether the changes in employment varied between the different types of traders throughout the town, cross-tabulations were run between employment change and type, size, and location of outlets. The application of the Pearson Chi-Square test identified three significant relationships at the 95% confidence level. Firstly, employment pattern change was greater for major comparison than other outlets (Table 6.11). Employment remained the same for only 3 (17.6%) major comparison outlets, compared to 42 (53.8%) other outlets. This may reflect a greater ability or willingness of the managers of major comparison outlets to utilise staff change to respond to changes affecting their businesses. Secondly, employment pattern change was least for smaller outlets (Table 6.12). Employment remained the same for 19 (67.9%) outlets under 1000 sq ft, 23 (48.9%) outlets of 1000-2499 sq ft, but for only 3 (15%) of units of 2500 sq ft or over. This may be because the smaller units employ fewest with least scope for change. Thirdly, the prime areas performed best, and the secondary areas worst, in terms of employment change (Table 6.13). For prime areas 11 out of 20 units (55%) reporting changes, increased employment. In secondary areas 8 out of 10 units (80%) reporting change, decreased employment. In the peripheral areas 13 out of 20 units (65%) reporting change, decreased employment. The better turnover performance of shops in prime areas may be a factor that helps explain the reported employment increases in those areas.

Table 6.11

Employment change by type of outlet in Llanelli 1992-97

Type of outlet	Employment 1992-1997 % of respondents			
	n	Increased	Decreased	Remained the same
Major comparison	17	35.3	47.1	17.6
Other	78	17.9	28.2	53.8
Total	95	21.1	31.6	47.4

Above 95% confidence level

Chi-Square 7.427 df 2 Significance 0.024

Source: 1997 Trader survey

Table 6.12

Employment change by size of outlet in Llanelli 1992-97

Size of outlet	Employment 1992-1997 % of respondents			
	n	Increased	Decreased	Remained the same
1000-2499 sq. ft	47	19.1	31.9	48.9
Under 1000 sq. ft	28	10.7	21.4	67.9
2500sq. ft and over	20	40.0	45.0	15.0
Total	95	21.1	31.6	47.4

Above 95% confidence level

Chi-Square 13.898 df 4 Significance 0.008

Source: 1997 Trader survey

Table 6.13

Employment change by location of outlet in Llanelli 1992-97

Location of outlet	Employment 1992-1997 % of respondents			
	n	Increased	Decreased	Remained the same
Prime	25	44.0	36.0	20.0
Secondary	20	10.0	40.0	50.0
Periphery	50	14.0	26.0	60.0
Total	95	21.1	31.6	47.4

Above 95% confidence level

Chi-Square 15.358 df 4 Significance 0.004

Source: 1997 Trader survey

An examination of the actual net employment change for outlets providing information on employment levels in 1992 and 1997 reveals a slightly different picture (Table 6.14). In net terms the secondary areas lost 30 jobs, the prime area lost 4 jobs, but in peripheral areas job losses were balanced by job gains.

Table 6.14

Numbers employed in Llanelli in 1992 and 1997

Location	1992	1997
Prime	226	222
Secondary	166	136
Periphery	224	224
Total	616	582

Source: 1997 Trader survey

The possible relationship between improved and unimproved areas and employment change was explored by cross-tabulation and Chi-Square testing (Table 6.15). The relationship was significant at the 95% confidence level. Employment pattern change was greatest in the improved areas. Employment remained the same for 15 (34.1%) outlets in the improved areas compared to 30 (58.8%) in the unimproved areas. The improved areas performed best in terms of employment increase. 14 out of 29 outlets (48%) reporting change, increased employment in the improved areas. In the unimproved areas only 6 out of 21 outlets (29%) reporting change, increased employment.

Table 6.15

Employment change in improved and unimproved areas in Llanelli

Area	n	Employment change 1992-1997 % of respondents		
		Increased	Decreased	Remained the same
Improved	44	31.8	34.1	34.1
Unimproved	51	11.8	29.4	58.8
Total	95	21.1	31.6	47.4

Above 95% confidence level

Chi-Square 7.726 df 2 Significance 0.021

Source: 1997 Trader survey

On the face of it, this might imply that the environmental improvements had influenced trader decisions in relation to employment change. To explore this issue further, respondents were asked for their views on the effect of changes in the town on their employment decisions (Table 6.16). The perceived influence was minimal. 64 traders (77.1%) thought the changes had made no difference to the numbers they employed. There was also a negative effect. 14 traders (16.9%) reported the changes had resulted in staff reductions.

Table 6.16

Effect of changes to town on employment decisions in Llanelli

Employment decisions	No	% of respondents
Made no difference to numbers employed	64	77.1
Created conditions resulting in reduction of staff	14	16.9
Created conditions to retain staff	4	4.8
Created conditions to take on more staff	1	1.2
Total	83	100

Source: 1997 Trader survey

The lack of impact of environmental improvements on business decisions relating to employment change is further illustrated by consideration of reasons given by traders for employment change. Respondents who had reported employment change were asked to give the reasons for that change. The most frequently mentioned reason for employment increase was more business (7 mentions), and the introduction of flexible hours of working (3 mentions). Less business (13 mentions) and company policy (5 mentions) were most frequently mentioned as reasons for employment decrease.

There was some evidence to suggest that there was a small reduction in the number of people employed by the traders over the period 1992-97. There was also an increase in part-time employment, in line with national trends (Montgomery 1990; Kirby 1993). The pattern of employment change varied. The change was greater for major comparison stores than it was for the independent traders and those in smaller outlets. There was also spatial variation. A higher proportion of traders in the prime areas, and the improved areas, reported increased employment compared with traders located elsewhere in the town centre. On the face of it this might imply that the improvements had positively influenced trader decisions in relation to employment change. However, the perceived influence was minimal in 1997. The vast majority of traders thought the changes made no difference to the numbers employed. If anything, the perception was that there was there was a small negative impact. Furthermore, the traders most frequently mentioned more business and flexible hours of working as reasons for employment increase; and less business or company policy as reasons for employment decrease.

Private investment

A further indicator of town centre decline or recovery is the extent to which a town centre is able to attract private sector investment (DOE 1994). For Llanelli, the extent of private investment was explored for existing traders, new businesses and developers.

As a first stage in the investigation the traders were asked whether they had invested in their business since April 1992, and if they had, to specify the purpose of the investment. 67 (55.8%) traders had invested in their business since 1992. 53 (44.2%) traders either had not invested or were unwilling to disclose whether or not they had invested. Of the 123 businesses surveyed the reported investment by category was as follows: roofs 12, elevations 5, shop fronts 24, internal works 39, external works 13, and other investment 22.Those able and willing were also asked to disclose levels of investment in defined bands. The response, from 58 traders, is set out in Table 6.17. In most cases the level of investment by individual traders was modest, but in aggregate it was significant. 45 traders (77.6%) invested less than £50k. Only 2 traders invested £250k or more. The aggregate investment of traders surveyed and willing to disclose information was in the £1.6-4.0m range.

Table 6.17

Investment bands of traders in Llanelli 1992-97

Investment bands £k 1992-1997	No.	% of respondents
0-9	27	46.6
10-49	18	31.0
50-99	9	15.5
100-249	2	3.4
250-499	1	1.7
500-999	1	1.7
Total	58	100

Source: 1997 Trader survey

The possible relationships between type of outlet, size, location, and investment change were also explored by cross-tabulation and Chi-Square testing. No significant relationships were identified at the 95% confidence level. The prime and improved areas, which performed better in terms of turnover and employment change, were not areas of significantly higher trader investment. The traders were also asked directly whether changes to the town had influenced their decision to invest. The perceived influence was not great, except for a minority of traders (Table 6.18).

Table 6.18

Effect of changes to town on investment decisions in Llanelli

Investment decisions	No.	% of respondents
Not at all	36	63.2
To a small degree	11	19.3
Significantly	6	10.5
Don't know/not applicable	4	7.0
Total	57	100

Source: 1997 Trader survey

The majority of traders (36 or 63.2%) thought the changes to the town had not influenced their decision to invest at all. 11 traders (19.3%) acknowledged influence to a small degree, but only 6 (10.5%) believed the changes had significantly influenced their investment decision. The perceived lack of influence of changes to the town centre on investment decisions was confirmed when traders were asked why they made their investments. Table 6.19 lists the response mentioned at least 3 times. Whilst the traders did not acknowledge a link between improvements to the public realm and their investment decisions 30 traders mentioned they had invested to modernise or improve their image or service.

Table 6.19

Reasons for investment in businesses in Llanelli

Reasons for investment	No. of mentions
Modernise/improve image or service	30
Start up/property acquisition	8
Necessary repairs	5

Source: 1997 Trader survey

The research, therefore, suggests that a majority of traders invested in their businesses during the period, 1992-97, when the environment of the town centre was improved. Indeed, by 1997, Carmarthenshire County Council and the WDA claimed that £6m of private investment in shop improvements was attracted because of the changes to the town (Carmarthenshire County Council/WDAa no date). This estimate is not inconsistent with the findings of the trader survey, but in 1997, only a very small minority of traders thought that the changes in the town significantly influenced their decisions to invest. The traders most commonly claimed that they had invested to modernise or improve their image or service, not because of the improvements to the environment of the public realm.

By 1997 the combined private sector investment in new building development by H&W Developments and Redrow/Sun Life and was also very substantial. H&W Developments invested £1m in a new office building in Stepney Street in 1993. Of greater significance was the development of the St Elli shopping centre in 1997 by Redrow Commercial, funded by Sun Life. Sun Life invested £19m in the new centre, excluding “fit-out” investment by ASDA and other occupiers (*Estates Gazette* September 14 1996: 51). To complement the trader survey Redrow Commercial was interviewed (Interview with Peter Howarth, October 1997) to explore the extent to which public investment had influenced their decision to develop in the town. Key extracts from the interview are reproduced in question (Q) and answer (A) form.

Q “Can I ask you about some of the off-site works? So the first one, for example, is the Vaughan Street/Stepney Street area which is the main prime shopping centre out there. Did the investment in paving and canopies influence your decision to invest here at all?”

A “Yes it did.”

Q “And would you say significant, a little or not at all?”

A “I would probably say a little. The attraction is the development rather than what happens around the development, but the fact that the Council were improving the area and working with an overall concept to try and integrate the whole town centre that obviously made it more attractive.”

Q “The same question in terms of the Stepney Precinct”

A “I would probably say it did not make us come in, no it did not actually, probably a little again. The main draw is still what it was and all we did was took the concept and ran it right through.”

Q “Cowell Street, which is the other side of the market, more recently there has been some paving.”

A "Not at all that one, I was not even aware of it."

Q "The market multi-storey car park, there was some structural work done and I think a bit of painting."

A "Not at all, it is not helping us a lot, I must admit it is a lot brighter and nicer inside but to answer your question it did not change our minds, it did not affect our decision."

Q "The Stepney place car park. Did that make a difference with a bus-stop and car park there?"

A "That made a difference. I think that was probably significant, that car park did have an effect. The multi-storey, but not the decoration of it, its existence was the important thing because you need both, that was a big improvement."

Q "Lastly the actual remediation of site and the diversion of the road."

A "That was the biggest major significant reason for us coming. Because that is something obviously you could not have done without it. The investment was required from somewhere. It had to be done at some time and it was done in a manner that made the site attractive and drew us and other parties in."

Q "It is not something you could have picked up yourself?"

A "You can imagine it would have made an enormous change to the financial viability of the scheme. I do not know at what cost but for arguments sake if you have then got to add £2-3m to your build cost, take it straight off your bottom line. All of a sudden it may well be that your appraisal of that site makes it unfavourable."

Sun Life was contacted by telephone (Interview with Huw Stephens, July 1997) to discuss the reasons for their investment in the town. The main reason that Sun Life invested in the St Elli shopping centre was because it was a "good deal". They believe it will meet a gap in the supply of retail units, and the population in the catchment area has sufficient purchasing power for the type of goods and services that will be offered in the centre. Sun Life claimed that public sector investment elsewhere in the town centre was not a significant influence on their decision to invest in the town.

The investment in the public realm, and the promotion of a clear regeneration strategy, therefore, played a part in the decision that Redrow took to develop the new £20m St Elli shopping centre. The influence of the public realm improvements was, however, not great compared with the public investment in assembling and preparing the site, and it apparently had little bearing on Sun Life's subsequent decision to buy and manage the completed centre, because it was "a good deal". These findings were consistent with other UK research into the impact of environmental improvements that found that whilst amenity improvements could "reinforce investment decisions" they were insufficient without the removal of physical constraints (DOE 1995: 102).

There were two other notable examples of private investment that were attracted to buildings whose external appearance had been improved with public funding assistance. Firstly, there was the attraction of a £1m investment by Wetherspoon to the old cinema in Stepney Street, adjacent to Lucania Buildings. The promoters of this development confirmed that the "new look town" was influential in their decision to invest (*Llanelli Star* March 26th 1998). Secondly, Agenda Studios refurbished the former Tesco building in Park Street in 1998 at a cost of £2.3m, with the benefit of a £0.5m public sector town improvement grant (*Llanelli Star* September 3rd 1998).

The analysis suggests changes to the economic performance of the town 1992-97 varied especially for location. The prime areas performed best in terms of turnover increase, and retained a fairly stable level of employment. The secondary areas performed worst, with turnover and employment reductions. The peripheral areas maintained overall employment levels, with probable reduced turnover. This suggests that although the prime areas of the town had traded relatively well 1992-97, overall, the town centre was probably in decline during that period. The improved areas also performed better in terms of turnover and employment change, but not in relation to trader investment. On the face of it, these findings were consistent with a positive influence of the environmental works on turnover and employment change, at least within the improved area.

However, the general trader view was that the influence was minimal. The traders thought other factors such as retail management and the level of business in the town were more influential. Public investments in the town centre, which primarily involved changes to the environment of the public realm, were not, therefore, perceived to have had a significant effect on changing patterns of turnover, employment, and trader investment. The responses of Redrow and Sunlife also suggest that the environmental changes did not significantly affect their investment decisions, although they did influence them to a limited extent. Public investment in the maintenance and improvement of car parking facilities and the creation of a viable development site was, however, critical to the attraction of the privately developed and funded St Elli shopping centre. Whilst other factors were, therefore, probably of more significance, it would be wrong to undervalue the role that the environmental improvements played in helping to attract such a major investment to a declining town that had struggled for many years to secure new private shopping development.

Benefits to business

If the environmental works had a limited perceived impact on trading patterns it would be expected that the traders would also consider the benefits of the works on their businesses to be limited. Further evidence on this issue was obtained by "open" questions asking traders what national or local changes had been most or least beneficial to their business. The majority of traders did not answer the question implying they had no strong views or were unable to identify any specific events of benefit or disbenefit to their business. For those who did respond, changes to the town centre were perceived more often as a disbenefit than a benefit. The negative effects of out of town retailing on the town centre were also highlighted. Tables 6.20-6.21 list the responses mentioned at least 3 times. Only 7 respondents considered the changes to the town centre had been of benefit to their business. The two most frequently mentioned disbenefits were changes to the town centre, including disruption (24 mentions), and loss of trade to Trostre Park (11mentions).

Table 6.20

Benefits to business in Llanelli

Benefits to business	No. of mentions
None	39
Changes to town centre	7

Source: 1997 Trader survey

Table 6.21

Disbenefits to business in Llanelli

Disbenefits to business	No. of mentions
Changes to town centre, including disruption	24
Loss of trade to Trostre Park	11
None	10
Delay of new shopping centre	6
Poor public sector performance	5
Recession	4
Loss of parking spaces	4
Loss of trade to other locations	4
Loss of employment	3
Run down town/ parts of town	3

Source: 1997 Trader survey

Since trader attitudes to the extent to which the changes in the town were or were not beneficial, was a key issue their detailed responses are presented in Appendix 4 to provide a greater insight into the nature of the changes regarded as most or least beneficial. In each case reference is made to the questionnaire number and a brief profile of the respondent is provided. It is difficult to draw general conclusions from the views of the 7 traders who thought the changes were beneficial because the numbers of responses was small. However, redevelopment and various environmental improvements were cited as being beneficial. Whilst 24 traders thought changes to the town centre were least beneficial to their business in the previous five years, in most cases it is evident it was the disruptive influence of those changes during construction which was of concern rather than the changes *per se*. The implication from this evidence is that in most cases the perception of disbenefit should disappear once the construction works are completed. Complaints regarding disruption during construction are not unique to Llanelli and have been noted in other UK town centres the subject of physical change (DOE 1997a; Lockwood 1997b). For this reason, public and private sector developers in town centres should pay careful attention to the need to mitigate the harmful effects of disruption caused by construction works on established businesses (Lockwood 1997b).

The traders were also asked the degree to which specific changes had been beneficial to their business. For every specific change the majority of respondents considered there was no or a neutral effect, with a minority acknowledging a minor benefit (Table 6.22). Very few traders thought the changes were of significant benefit. For example, 37 (30.3%) and 31(25.4%) traders respectively considered the up-grade of the multi-storey car park and improvements to Vaughan Street was a minor benefit. Only 6 (4.9%) and 4 (3.3%) traders respectively thought those changes were of significant benefit. The traders thought the most beneficial changes were the new paving and canopies in Stepney Street and Vaughan Street, and the car parking at Stepney Place and Murray Street. Relatively few traders thought the new development on the coast and the up-grading of Lucania Buildings was beneficial to their businesses.

Table 6.22
Benefits of changes to town centre on businesses in Llanelli

Changes	n	Degree of benefit % of respondents					
		Signif-icant benefit	Minor benefit	No effect/ neutral	Minor disbenefit	Signif-icant disbenefit	Don't know
New bus bays at Stepney place	118	0.8	20.3	65.3	5.9	5.9	1.7
New car park at Stepney Place	122	1.6	27.0	59.8	1.6	7.4	2.5
New developments on the coast	122	3.3	14.8	67.2	1.6	2.5	
New paving & canopies in Cowell Street	123	3.3	18.7	69.9	1.6	5.7	0.8
New paving & canopies in Stepney Street	123	5.7	23.6	63.4	2.4	4.1	0.8
New paving & canopies in Vaughan St.	122	3.3	25.4	65.6	0.8	4.1	0.8
Up-grade of Lucania Buildings	123	0.8	4.9	69.9	2.4	2.4	19.5
Up-grade of the multi-storey car park in Murray Street	122	4.9	30.3	59.8	2.5	0.8	1.6

Source: 1997 Trader survey

To explore whether the degree of benefit for specific changes was consistent between the different types of traders throughout the town, cross-tabulations were run between the trader view of benefit for specific changes and type, size, and location of outlets. Application of the Pearson Chi-Square test identified several significant relationships at the 95% confidence level.

Firstly, the analysis suggested that the changes in Stepney Street and Vaughan Street had a localised impact, although the benefits were considered to be minor, not significant. A higher proportion of traders in the prime and improved areas which comprised Stepney Street, Vaughan Street, or adjacent nearby areas, thought the changes were beneficial compared with those located elsewhere (Tables 6.23-6.26). In the prime areas 13 (44.8%) and 15 (51.7%) traders respectively thought works in Stepney Street and Vaughan Street were of significant or minor benefit. Only 4 (13.8%) and 3 (10.3 %) traders respectively thought those changes were of significant benefit. In the improved areas 26 (49.1%) traders thought works in Stepney Street and Vaughan Street were of significant or minor benefit. Only 6 (11.3%) and 4(7.5%) traders respectively thought those changes were of significant benefit.

Table 6.23

Benefit of new paving and canopies in Stepney Street, Llanelli, by location

Location of outlet	n	Degree of benefit % of respondents	
		Significant/minor disbenefit/no effect/neutral	Significant/minor benefit
Prime	29	55.2	44.8
Secondary	26	65.4	34.6
Periphery	67	79.1	20.9
Total	122	70.5	29.5

Above 95% confidence level

Chi-Square 5.987 df2 Significance 0.050

Source: 1997 Trader survey

Table 6.24

Benefit of new paving and canopies in Vaughan Street, Llanelli, by location

Location of outlet	n	Degree of benefit % of respondents	
		Significant/minor disbenefit/no effect/neutral	Significant/minor benefit
Prime	29	48.3	51.7
Secondary	26	65.4	34.6
Periphery	66	83.3	16.7
Total	121	71.1	28.9

Above 95% confidence level

Chi-Square 12.566 df2 Significance 0.002

Source: 1997 Trader survey

Table 6.25

Benefit of new paving and canopies in Stepney Street, Llanelli, by location

Location of outlet	n	Degree of benefit % of respondents	
		Significant/minor disbenefit/no effect/neutral	Significant/minor benefit
Improved area	53	50.9	49.1
Unimproved area	69	85.5	14.5
Total	122	70.5	29.5

Above 95% confidence level

Chi-Square 17.216 df1 Significance 0.000

Source: 1997 Trader survey

Table 6.26

Benefit of new paving and canopies in Vaughan Street, Llanelli, by location

Location of outlet	n	Degree of benefit % of respondents	
		Significant/minor disbenefit/no effect/neutral	Significant/minor benefit
Improved area	53	50.9	49.1
Unimproved area	68	86.8	13.2
Total	121	71.1	28.9

Above 95% confidence level

Chi-Square 18.590 df1 Significance 0.000

Source: 1997 Trader survey

Secondly, a higher proportion of major comparison stores thought that the changes in Stepney Street and Vaughan Street were beneficial (Tables 6.27-6.28). 10 (47.6%) major comparison traders thought works in Stepney Street and Vaughan Street were of significant or minor benefit. Only 3 (14.3 %) and 2 (9.5 %) major comparison traders respectively thought those changes were of significant benefit. This may reflect the local impact dimension previously discussed, as most of the major comparison stores were located in the prime and the improved areas. It might also reflect a difference in the nature of the business cultures of the local and national traders. Perhaps the major comparison stores, mainly national multiples, adopted a more positive attitude to change compared with the smaller local independent trader (Hass-Klau 1993), a possibility that is elaborated later in this chapter.

Table 6.27

Benefit of new paving and canopies in Stepney Street, Llanelli, by type of outlet

Type of outlet	n	Degree of benefit % of respondents	
		Significant/minor disbenefit/no effect/neutral	Significant/minor benefit
Major comparison	21	52.4	47.6
Other	101	74.3	25.7
Total	122	70.5	29.5

Above 95% confidence level

Chi-Square 4.000 df1 Significance 0.046

Source: 1997 Trader survey

Table 6.28

Benefit of new paving and canopies in Vaughan Street, Llanelli, by type of outlet

Type of outlet	n	Degree of benefit % of respondents	
		Significant/minor disbenefit/no effect/neutral	Significant/minor benefit
Major comparison	21	52.4	47.6
Other	100	75.0	25.0
Total	121	71.1	28.9

Above 95% confidence level

Chi-Square 4.319 df1 Significance 0.038

Source: 1997 Trader survey

Thirdly, a higher proportion of traders in larger stores thought the changes in Vaughan Street were beneficial (Table 6.29). 12 (52.2%) traders in outlets of 2500 sq ft and over thought works in Vaughan Street were of significant or minor benefit, though only 3 (13 %) traders in the larger stores thought those changes were of significant benefit. Again, this may reflect the local impact dimension previously discussed as most of the larger comparison stores were located in the prime and the improved areas. It might also, again, reflect a difference in the nature of the business cultures of the larger outlets that were mainly national traders (Hass-Klau 1993).

Table 6.29

Benefit of new paving and canopies in Vaughan Street, Llanelli, by size of outlet

Size of outlet	n	Degree of benefit % of respondents	
		Significant/minor disbenefit/no effect/neutral	Significant/minor benefit
Under 1000 sq ft	37	67.6	32.4
1000-2499 sq ft	61	82.0	18.0
2500 sq ft and over	23	47.8	52.2
Total	121	71.1	28.9

Above 95% confidence level

Chi-Square 9.789 df2 Significance 0.007

Source: 1997 Trader survey

Fourthly, a higher proportion of service outlets (15 or 62.5%) thought the multi-storey car park was beneficial, compared with comparison and convenience outlets (Table 6.30). There was no obvious explanation for that finding.

Table 6.30

Benefit of multi-storey car park, Llanelli, by type of outlet

Type of outlet	n	Degree of benefit % of respondents	
		Significant/minor disbenefit/no effect/neutral	Significant/minor benefit
Convenience	9	88.9	11.1
Comparison	87	69.0	31.0
Service	24	37.5	62.5
Total	120	64.2	35.8

Above 95% confidence level

Chi-Square 10.686 df2 Significance 0.005

Source: 1997 Trader survey

Since traders in the prime and improved areas benefited most from the improvements to Stepney Street and Vaughan Street, and those areas also performed better in terms of turnover and employment change, it might be expected that there would be a relationship between turnover and employment change and benefits to business. To explore this, further cross-tabulations were run to consider the relationship between employment and turnover change and the benefits of changes to the town (Tables 6.31-6.32).

Table 6.31

Benefit of new paving and canopies in Vaughan Street, Llanelli, by employment change

Employment change 1992-1997	n	Degree of benefit % of respondents	
		Significant/minor disbenefit/no effect/neutral	Significant/minor benefit
Increased	19	42.1	57.9
Decreased	30	76.7	23.3
Remained the same	45	80.0	20.0
Total	94	71.3	28.7

Above 95% confidence level

Chi-Square 9.996 df2 Significance 0.007

Source: 1997 Trader survey

Table 6.32

Benefit of new paving and canopies in Vaughan Street, Llanelli, by turnover change

Turnover change 1992-1997	n	Degree of benefit % of respondents	
		Significant/minor disbenefit/no effect/neutral	Significant/minor benefit
Higher/significantly higher	30	53.3	46.7
No change	18	77.8	22.2
Lower/significantly lower	35	85.7	14.3
Total	83	72.3	27.7

Above 95% confidence level

Chi-Square 8.801 df2 Significance 0.012

Source: 1997 Trader survey

The application of the Pearson Chi-Square test identified significant relationships at the 95% confidence level. A higher proportion of traders who had reported employment and turnover increases in the previous five years thought the works in Vaughan Street were beneficial. 11 (57.9%) traders who had reported employment increases thought the works in Vaughan Street were a minor or significant benefit. 14 (46.7%) traders who had reported turnover increases thought the works in Vaughan Street were beneficial. Those businesses that performed well may have had a more positive attitude to the works, than those that had performed less well.

The traders also valued environmental improvements less than improvements to accessibility or the town's attractions. They were asked to rank 1-10 (1 being least and 10 being most beneficial) the benefits of different types of completed investment to the trading performance of businesses in the town centre. The mean rank was 5.57 for environmental works, 6.97 for roads, car parks and bus stops, and 8.16 for the new shopping centre (Table 6.33).

Table 6.33

Trader ranking of benefits of different investments in Llanelli

Area	n	Mean rank of benefits
Environmental works	116	5.57
Roads, car parks, bus stops	116	6.97
New Shopping Centre.	116	8.16

Source: 1997 Trader survey

This supports the view that the priority order for action to improve the town as a shopping destination relates to attractions (new shopping centre), accessibility (roads, car parks, bus stops), and amenity (environmental works). As previously discussed, other UK surveys have also noted the importance of retail attractions as a component of a healthy town centre (Evans 1997; Page and Hardyman 1996).

Overview of trader benefits to business

In 1997 a minority of traders thought that the disruption caused by changes to the town centre was a factor least beneficial to their businesses in the previous five years. Most of the traders thought that the changes had no, or a neutral, effect on their businesses. A minority acknowledged a minor benefit. Very few traders thought that the changes were of significant benefit. It is interesting to note that very few traders thought that the environmental improvements were of significant benefit to their businesses since their role in enhancing the amenity of the town was acknowledged by the traders and residents, and commended by the Civic Trust. It is possible that the continued disruption on the nearby shopping redevelopment site undermined the benefit, or that it was simply too early, in 1997, to see any positive effect. It is also possible that the changes produced mainly environmental rather than economic benefits.

However, there is also another interesting possibility that trader scepticism may have undermined their willingness to consciously acknowledge the benefits of the changes to the town. There may be parallels with the varying attitudes of traders to the impact of pedestrianisation schemes identified by Hass-Klau (1993):

> "The question of what the impact is of pedestrianisation and traffic calming on retailing has been asked many times. The answers which are usually offered fall into a pattern. The local retailers are sceptical, the representatives of national chain stores are neutral or optimistic, pedestrians are normally enthusiastic, and the local authority is convinced that pedestrianisation will bring about the total and long-dreamed of transformation of the town-centre investment" (Hass-Klau 1993: 21).

As discussed below the major comparison traders in Llanelli were generally more positive about the changes to the town than the smaller independent traders, mirroring the pattern identified by Hass-Klau.

The changes in Llanelli town centre appeared to have had a local impact in 1997. A higher proportion of traders in the prime and improved areas and major comparison stores thought the changes in Stepney Street and Vaughan Street were beneficial. A higher proportion of larger stores thought the changes in Vaughan Street were beneficial.

The findings relating to store type and size may also reflect location as most of the comparison and larger stores were situated in the prime and the improved areas. As discussed above, they may also reflect a difference in the nature of the business cultures of the major comparison and larger outlets that were mainly national traders (Hass-Klau 1993). A higher proportion of traders who had reported employment and turnover increases in the previous five years thought the works in Vaughan Street were beneficial. Those businesses that performed well may have had a more positive attitude to the works, compared with those that had performed less well; their businesses may also have been assisted by the changes to the environment in the town. The traders valued environmental improvements less than improvements to accessibility or the town's attractions, suggesting that new attractions are the cornerstone of the revitalisation programme.

Attitudes of traders to attractions, accessibility and amenity

Experience elsewhere in the UK suggests that declining town centres can be revitalised by action to improve their attractions, accessibility, and amenity (DOE 1994). At the time of the trader survey in 1997 most of the completed publicly funded works were of an environmental nature. The main new attraction, the St Elli shopping centre, was opened in November 1997 after the trader survey was completed. The trader survey findings for Llanelli suggest that in the period 1992-1997 the environmental or amenity improvements brought minor benefits to businesses. Most of the traders thought they had a limited impact on turnover, employment and investment patterns. Furthermore, the findings suggest that although the prime shopping area performed relatively well, overall the town centre was probably still in decline in 1997. If this view is correct and the town was still in overall decline there should be evidence of dissatisfaction with certain aspects of the town's attractions or accessibility which can critically affect town centre vitality and viability. On the other hand, if the public investment in environmental improvements was becoming effective there should be evidence of general trader satisfaction with amenity in the town centre. Furthermore, an exploration of trader attitudes to attractions and accessibility helps put their attitudes to amenity in context which is helpful in trying to disentangle the impact of changes to the environment from other aspects of revitalisation. The next section of the chapter explores trader attitudes to attractions; subsequent sections consider trader attitudes to accessibility and amenity.

Trader attitudes to attractions

The range and quality of shopping and other facilities are key attractions that affect the vitality of town centres (Baldock 1989; Bianchini 1995; DOE 1992; DOE 1994; Evans 1997; Jacobs 1961; Montgomery 1990). To explore the situation in Llanelli town centre traders were asked the extent to which they agreed with specific statements relating to changes to the attractions of the town centre, in relation to shopping and entertainment provision (Table 6.34). The statements in the questionnaire contained a mixture of favourable and unfavourable comments on the changes in the town to reduce any influence on the responses. There was widespread agreement that shopping facilities had worsened, and entertainment facilities had not improved. 82 (67.2%) traders agreed or strongly agreed that the range of shops had worsened. 54 (44.6%) disagreed or strongly disagreed that entertainment facilities had improved.

Table 6.34
Trader attitudes to changes to attractions in Llanelli

Statements Regarding Attractions	n	Attitudes % of respondents					
		Strongly agree	Agree	No strong feelings	Disagree	Strongly disagree	Don't know
The range of shops has worsened	122	24.6	42.6	13.1	18.9	0	0.8
Entertainment facilities have improved	121	0.8	11.6	28.1	38.8	5.8	14.9

Source: 1997 Trader survey

As presented in chapter 5 an analysis of GOAD summary reports for September 1992 and December 1996 also supports the trader perception that the range of shops had worsened in the period prior to the trader survey (Table 5.23).

The traders were also asked whether they were satisfied with the provision of specific attractions (Table 6.35). There was a high level of satisfaction with the price of goods, banks and building societies, and the indoor market. There was generally a great deal of dissatisfaction with shopping and entertainment facilities; especially foodstore provision, the outdoor market, toilets, and facilities for children. Traders were respectively satisfied with the price of goods (89 or 74.8%), banks and building societies (89 or 73.6%), and the indoor market (72 or 60.0%).Traders were dissatisfied or very dissatisfied with the range of shops (103 or 85.1%), variety stores (90 or 73.8%), and foodstores (107 or 87.0%). 50 (41.3%) traders were dissatisfied with the outdoor market. 73 (59.8%) and 55 (45.8%) were respectively very dissatisfied with toilet facilities, and those for children.

These attitudes were expected. There was a wide variety of banks and building societies in the town. Despite being in an unattractive 1960s building, the indoor market probably retained its popularity because of its traditional atmosphere, and its location in the heart of the town centre. The particular dissatisfaction with foodstore provision and other shopping facilities was probably due to the relocation of Tesco to Trostre Park and the lack of variety of comparison shops relative to Swansea and Carmarthen. The outdoor market suffered because it was temporarily relocated to a more peripheral pitch opposite the former Tesco building to make way for the new development. The public toilets were demolished to make way for the new shopping centre.

Table 6.35

Level of trader satisfaction with attractions in Llanelli

Attractions	n	Level of satisfaction % of respondents				
		Very satisfied	Satisfied	Dissatisfied	Very dissatisfied	Don't know/ no view
Banks and building societies	121	24.8	73.6	0	0	1.7
Facilities for children	120	1.7	4.2	28.3	45.8	20.0
Foodstores	123	3.3	7.3	39.0	48.0	2.4
Indoor market	120	3.3	60.0	26.7	7.5	2.5
Outdoor market	121	1.7	16.5	41.3	28.9	11.6
Price of goods	119	1.7	74.8	7.6	3.4	12.6
Range of entertainment facilities	121	1.7	19.8	29.8	33.1	15.7
Range of shops	121	1.7	13.2	62.8	22.3	0
Restaurants and cafes	120	5.8	38.3	40.8	11.7	3.3
Street events	118	0	22.9	28.0	26.3	22.9
Toilet facilities	122	1.6	0.8	31.1	59.8	6.6
Variety stores	122	1.6	22.1	57.4	16.4	2.5

Source: 1997 Trader survey

To explore whether the attitudes concerning attractions were consistent between the different types of traders throughout the town, cross-tabulations were run between trader levels of satisfaction and type, size, and location of outlets. The Pearson Chi-Square test was then applied.

There were some significant variations at the 95% confidence level in relation to levels of satisfaction with restaurants and cafes, street events, price of goods, and the outdoor and indoor markets. A higher proportion of major comparison stores were satisfied with street events, and a lower proportion satisfied with restaurants and cafes, compared with other traders in the town (Tables 6.36-6.37).

Table 6.36

Trader satisfaction with restaurants and cafes in Llanelli by type of outlet

Type of outlet	n	Level of satisfaction % of respondents	
		Very satisfied/satisfied	Dissatisfied/very dissatisfied
Major comparison	21	14.3	85.7
Other	95	52.6	47.4
Total	116	45.7	54.3

Above 95% confidence level

Chi-Square 10.191 df1 Significance 0.001

Source: 1997 Trader survey

Table 6.37

Trader satisfaction with street events in Llanelli by type of outlet

Type of outlet	n	Level of satisfaction % of respondents	
		Very satisfied/satisfied	Dissatisfied/very dissatisfied
Major comparison	19	57.9	42.1
Other	72	22.2	77.8
Total	91	29.7	70.3

Above 95% confidence level

Chi-Square 9.168 df1 Significance 0.002

Source: 1997 Trader survey

There were also relationships between the level of satisfaction with price of goods, street events, and the outdoor market in improved and unimproved areas, but there was no great difference between the areas (Tables 6.38-6.40).

Table 6.38

Trader satisfaction with price of goods in Llanelli by location

Location	n	Level of satisfaction % of respondents	
		Very satisfied/satisfied	Dissatisfied/very dissatisfied
Improved area	45	95.6	4.4
Unimproved area	59	81.4	18.6
Total	104	87.5	12.5

Above 95% confidence level

Chi-Square 4.706 df1 Significance 0.030

Source: 1997 Trader survey

Table 6.39

Trader satisfaction with street events in Llanelli by location

Location	n	Level of satisfaction % of respondents	
		Very satisfied/satisfied	Dissatisfied/very dissatisfied
Improved area	43	39.5	60.5
Unimproved area	48	20.8	79.2
Total	91	29.7	70.3

Above 95% confidence level

Chi-Square 3.802 df1 Significance 0.051

Source: 1997 Trader survey

Table 6.40

Trader satisfaction with outdoor market in Llanelli by location

Location of outlet	n	Level of satisfaction % of respondents	
		Very satisfied/satisfied	Dissatisfied/very dissatisfied
Improved area	49	10.2	89.8
Unimproved area	58	29.3	70.7
Total	107	20.6	79.4

Above 95% confidence level

Chi-Square 5.936 df1 Significance 0.015

Source: 1997 Trader survey

The higher degree of satisfaction with street events in the improved areas, and by major comparison stores, may have reflected a locational dimension. Most of the street events would have been held in the central areas of the town which were improved, and within which the majority of major comparison stores were located.

There were no significant relationships at the 95% confidence level between type, size, and location of outlets and levels of satisfaction with the most critical attractions affecting vitality such as shopping (foodstores, range of shops, variety stores) and entertainment facilities. This implies there was widespread dissatisfaction with those critical attractions by the different types of traders throughout the town.

Despite the public investment in amenity improvements there was general trader dissatisfaction with the attractiveness of the town as a shopping destination, due largely to the poor range of shops and the absence of a foodstore, and other facilities. This dissatisfaction was a further indicator suggesting the town centre was probably still in decline in 1997, and indicates the need for attractions as the cornerstone of town centre revitalisation in Llanelli.

St Elli shopping centre

If attractions are the cornerstone of regeneration it would be expected that the traders would generally regard the prospect of the new shopping centre as being beneficial to their businesses, and some traders would want to move into the new centre to capitalise on its prime location. To explore these issues the traders were asked whether they thought the new centre would harm, benefit, or not affect their business, and whether they planned to move into the centre. They were also asked to give the reasons for their answers. The vast majority, 83 (68.0%) traders, thought the new centre would benefit their business (Table 6.41). Most traders 96 (79.3%) planned to stay in their property; only 2 (1.7%) planned to move into the new shopping centre.

Table 6.41

Perceived effect of shopping centre on businesses in Llanelli

Effect	No.	% of respondents
Benefit	83	68.0
Harm	17	13.9
Not affect	14	11.5
Don't know	8	6.6
Total	122	100

Source: 1997 Trader survey

The most frequently mentioned reasons for why the new shopping centre would benefit the town were that the development would attract more shoppers to the town (72 mentions), and provide a bigger range of shops (8 mentions). Most of the traders clearly considered there would be spin -off benefits for their businesses. 12 traders thought the centre would harm their business because trade would be diverted to the new centre. Despite majority support for the centre most traders thought they would be content to stay in their current premises outside the centre. The most frequently mentioned reasons for this view that they were content with their present location (30 mentions), or because their premises were more affordable (34 mentions). This was probably because rents for retail units in the new centre were higher than rents elsewhere in the town centre. A further extract from the interview with Redrow Commercial (Interview with Peter Howarth, October 1997) supports this view:

Q "Do you think local independents may be interested in coming into the scheme?"

A "I think the only problem is that because rents are so low locally it is seen as a little prohibitive. But there is certainly the interest. People want to be part. They want to be associated with the scheme. They want the scheme to succeed. But whether they are prepared to pay the sort of rents in comparison to what adjacent properties are costing remains to be seen."

Q "So you would not preclude but there may be a commercial constraint?"

A "Definitely the interest is there. In fact Birthday, birthday card people, they have got a unit in town and they are buying a unit here too. They are not independent, they are sort of local, and they are going for it."

Trader attitudes to accessibility

The accessibility of a town centre to its catchment population can affect its trading performance (Bromley and Thomas 1993b; DOE 1994; Evans 1997; URBED 1999). The traders were asked whether they agreed with specific propositions concerning the effect of the opening of the Coastal Link Road and the A484 on trading patterns in the town centre (Tables 6.42-6.43). Again, the statements presented in the questionnaire contained a mixture of favourable and unfavourable comments on the changes in the town to reduce influence on the responses. 44 (35.8%) and 61 (50.4%) traders respectively agreed the opening of the Coastal Link Road and the A484 resulted in a loss of trade from Llanelli town centre. Although the town's environment had been improved, its attractions had not. The town had perhaps become more vulnerable to competition with neighbouring centres, such as Swansea, which were more accessible to Llanelli's population because of the new roads. The changing competitive status of Llanelli town centre is explored further in chapter 8.

Table 6.42

Perceived effect of coastal link road on trade in Llanelli town centre

Trader view	No.	% of respondents
Loss of trade	44	35.8
Don't know	15	12.2
Gain of trade	3	2.4
No change	61	49.6
Total	122	100

Source: 1997 Trader survey

Table 6.43

Perceived effect of A484 on trade in Llanelli town centre

Trader view	No.	% of respondents
Loss of trade to Swansea	61	50.4
No change	36	29.8
Don't know	12	9.9
Gain of trade from Swansea	12	9.9
Total	122	100

Source: 1997 Trader survey

Shopping convenience can also be influenced by factors that affect accessibility within town centres. To explore this further, the traders were asked whether they thought the opening of the Coastal Link Road had helped reduce congestion in the town centre (Table 6.44). 62 (50.8%) traders thought congestion was reduced, which indicates traffic users in the town centre might have benefited from the construction of the road.

Table 6.44

Perceived effect of coastal link road on traffic congestion in Llanelli town centre

Trader view	No.	% of respondents
Less congestion	62	50.8
More congestion	39	32.0
Don't know	21	17.2
Total	122	100

Source: 1997 Trader survey

In order to further consider the impact of changes the traders were asked the extent to which they agreed with specific statements relating to changes in relation to car parking, and bus stop provision (Table 6.45). Again, the statements contained a mixture of favourable and unfavourable comments on the changes in the town to reduce influence on the responses. The key message was that 75 (61.5%) traders, a significant majority, agreed or strongly agreed that despite new car parking provision, car parking remained inadequate. Only 36 (29.7%) thought the car parks had helped attract more shoppers to the town. As previously discussed, this finding is probably explained by the fact that the public investment improved the amenity of the car parks in Llanelli town centre but did not increase the number of parking spaces. Furthermore, additional car parking was provided as part of the St Elli shopping centre after the trader survey had been completed.

Table 6.45
Trader attitudes to changes to accessibility in Llanelli

Statements regarding accessibility	n	Attitudes					% of respondents
		Strongly agree	Agree	No strong feelings	Disagree	Strongly disagree	Don't know
Despite the new car parking provision, car parking remains inadequate	122	24.6	36.9	18.0	15.6	0.8	4.1
The car parks have helped attract more shoppers to the town	121	3.3	26.4	24.0	32.2	10.7	3.3
The multi-storey car park over the market is no better than it was	122	6.6	27.9	18.0	23.0	9.8	14.8
The new bus stops are well located	123	2.4	34.1	19.5	22.8	6.5	14.6
The new Stepney Place car park is badly located	123	4.9	25.2	25.2	36.6	4.1	4.1

Source: 1997 Trader survey

The traders were asked the degree to which they were satisfied with other specific matters relating to the town's accessibility (Table 6.46). There was a high level of satisfaction with pedestrian access within the town, general satisfaction with ease of access to the town centre by car, but less satisfaction with car parking provision. 91 (75.2%) traders were satisfied with the extent of pedestrian access and 66 (55.0%) traders with ease of access by car. 61 (50.4%) were dissatisfied or very dissatisfied with car parking. General satisfaction with pedestrian and car access was expected. Most of the central parts of the town centre were pedestrianised in the 1960s, and access by car has been improved by the new road construction referred to earlier. The relative dissatisfaction with car parking provision was consistent with earlier findings.

Table 6.46

Level of trader satisfaction with accessibility in Llanelli

Accessibility	n	Level of satisfaction % of respondents				
		Very satisfied	Satisfied	Dissatisfied	Very dissatisfied	Don't know/ no view
Car parking	121	1.7	43.8	31.4	19.0	4.1
Direction signs	120	2.5	38.3	30.0	14.2	15.0
Ease of access by car	120	0.8	55.0	26.7	14.2	3.3
Ease of access by public transport	120	1.7	40.0	27.5	9.2	21.7
Extent of pedestrian areas	121	9.1	75.2	8.3	2.5	5.0

Source: 1997 Trader survey

In order to explore whether the attitudes concerning accessibility were consistent between the different types of traders throughout the town, cross-tabulations were run between trader levels of satisfaction and type, size, and location of outlets. Application of the Pearson Chi-Square test showed there were no significant variations at the 95% confidence level. This implies a consistent attitude by the different types of traders throughout the town to responses to the accessibility issues raised.

With the exception of car parking, which requires further attention to assist revitalisation, accessibility issues did not emerge as a significant constraint on the revitalisation of the town centre. On the contrary, the extent of pedestrianised areas, improved with public investment, was a strength recognised with high levels of trader satisfaction. The traders were also generally more satisfied with factors relating to accessibility than they were in relation to key attractions most critical to town centre vitality. For example, 61(50.4%) traders were dissatisfied or very dissatisfied with car parking compared with 103(85.1%) with range of shops, and 107 (87%) with foodstores.

Trader attitudes to amenity

As discussed earlier, the amenity of a town centre reflects the extent to which it presents a pleasant, clean, well maintained and secure environment (DETR 2000b; DOE 1994; Evans 1997; Smith 1974; URBED 1999). If the public investment in environmental improvements in Llanelli was effective there should be evidence of general trader satisfaction with amenity in the town centre. The trader survey provided evidence that the changes had resulted in a perceived improvement to the appearance of the town centre, and general satisfaction with the shopping environment.

The traders were asked the extent to which they agreed with specific statements relating to changes to the amenity of the town centre (Table 6.47). Again, the statements contained a mixture of favourable and unfavourable comments on the changes in the town to reduce influence on the responses. 95 (78.6%) traders agreed or strongly agreed that the appearance of streets in the town centre had been improved. 83 (67.5%) of traders agreed or strongly agreed the new Stepney Place car park had a pleasant appearance, although 38 (31.2%) traders thought the new bus stops adjacent to the car park were badly designed. The majority of traders were, therefore, aware of a general improvement to the appearance of the town centre. Fewer traders (43 or 35.2%) agreed that the changes resulted in a more pleasant shopping experience; although the 43 traders were a majority excluding don't knows and those with no strong views. Two factors probably explain this. Firstly, the disruption caused by construction works was unpleasant at times. Secondly, the works to the public realm did not increase the range of

Table 6.47

Trader attitudes to changes to amenity in Llanelli

Statements regarding amenity	n	Attitudes % of respondents					
		Strongly agree	Agree	No strong feelings	Disagree	Strongly disagree	Don't know
Shopping is a more pleasant experience	122	4.1	35.2	23.8	27.9	4.9	4.1
The appearance of the streets has been improved	121	20.7	57.9	6.6	12.4	1.7	0.8
The new bus stops are badly designed	122	12.3	18.9	32.0	16.4	2.5	18.0
The new Stepney Place car park has a pleasant appearance	123	9.8	57.7	17.1	6.5	2.4	6.5
The streets feel less safe	121	13.2	22.3	27.3	28.1	2.5	6.6

Source: 1997 Trader survey

shops in the town, a key deficiency of the town at the time of the survey. A minority of traders also agreed the changes in the town had adversely affected safety in the streets. 43 (35.5%) traders thought the streets felt less safe, a majority excluding don't knows and no strong feelings.

The traders were also asked the degree to which they were satisfied with specific amenities (Table 6.48). 77 (63.7%) traders were satisfied or very satisfied with the shopping environment, and 91 (74.6%) were satisfied or very satisfied with lighting. The high level of satisfaction probably reflects the new public investment in up-grading the environment of the town. There was less satisfaction with the condition of buildings in the town centre. Whilst many had been improved the run down appearance and disrepair of others was still evident at the time of the survey. There was also less satisfaction with street cleaning, feeling of safety, and crime prevention measures, issues which are more related to the management of the town than investment in the public realm. As discussed previously, this finding is relevant because other UK research suggests that fear of safety can adversely affect the vitality of town centres (Oc and Tiesdale 1997a).

Table 6.48

Level of trader satisfaction with amenity in Llanelli

Amenity	n	Level of satisfaction % of respondents				
		Very satisfied	Satisfied	Dissatisfied	Very dissatisfied	Don't know/ no view
Attractiveness of shopping environment	121	2.5	61.2	24.0	6.6	5.8
Condition of buildings	121	0.8	45.5	34.7	9.1	9.9
Crime prevention measures	120	0.8	40.0	35.8	15.0	8.3
Feeling of safety	119	0	47.1	27.7	18.5	6.7
Lighting	122	4.9	69.7	16.4	3.3	5.7
Street cleaning	123	4.1	54.5	25.2	12.2	4.1

Source: 1997 Trader survey

In order to explore whether the attitudes concerning amenity were consistent between the different types of traders throughout the town, cross-tabulations were run between trader levels of satisfaction and type, size, and location of outlets. The Pearson Chi-Square test was then applied. There were some significant variations at the 95% confidence level in relation to levels of satisfaction with street cleaning, crime prevention measures, and feeling of safety, factors particularly associated with town centre management (Tables 6.49-6.52).

A higher proportion of traders in major comparison stores, and those in the prime and secondary areas, were satisfied with street cleaning, feeling of safety, and crime prevention measures. 17 (81.0%) major comparison traders were satisfied or very satisfied with street cleaning compared with 55 (56.7%) traders in other stores. 15 (75.0%) major comparison traders were satisfied or very satisfied with feeling of safety compared with 41 (45.1%) other traders. 14 (70.0%) major comparison traders were satisfied or very satisfied with crime prevention measures compared to 35 (38.9%) other traders. 19 (67.9%) traders in the prime area, and 14 (60.9%) in the secondary, were satisfied or very satisfied with feeling of safety, compared to 23 (38.3%) in the peripheral areas.

Table 6.49

Trader satisfaction with street cleaning in Llanelli by type of outlet

Type of outlet	n	Level of satisfaction % of respondents	
		Very satisfied/satisfied	Dissatisfied/very dissatisfied
Major comparison	21	81.0	19.0
Other	97	56.7	43.3
Total	118	61.0	39.0

Above 95% confidence level

Chi-Square 4.268 df1 Significance 0.039

Source: 1997 Trader survey

Table 6.50

Trader satisfaction with crime prevention measures in Llanelli by type of outlet

Type of outlet	n	Level of satisfaction % of respondents	
		Very satisfied/satisfied	Dissatisfied/very dissatisfied
Major comparison	20	70.0	30.0
Other	90	38.9	61.1
Total	110	44.5	55.5

Above 95% confidence level

Chi-Square 6.412 df1 Significance 0.011

Source: 1997 Trader survey

Table 6.51

Trader satisfaction with feeling of safety in Llanelli by type of outlet

Type of outlet	n	Level of satisfaction % of respondents	
		Very satisfied/satisfied	Dissatisfied/very dissatisfied
Major comparison	20	75.0	25.0
Other	91	45.1	54.9
Total	111	50.5	49.5

Above 95% confidence level

Chi-Square 5.882 df1 Significance 0.015

Source: 1997 Trader survey

Table 6.52

Trader satisfaction with feeling of safety in Llanelli by location

Location of outlet	n	Level of satisfaction % of respondents	
		Very satisfied/satisfied	Dissatisfied/very dissatisfied
Prime	28	67.9	32.1
Secondary	23	60.9	39.1
Periphery	60	38.3	61.7
Total	111	50.5	49.5

Above 95% confidence level

Chi-Square 7.917 df2 Significance 0.019

Source: 1997 Trader survey

In part this difference may reflect a variation in the level of service provided in different parts of the town, or the varying vitality of different areas. For example, the central areas, which contain most of the major comparison stores, have CCTV cameras and tend to be the busier shopping areas, where people are likely to feel safer. The differences may also reflect the better security of the larger stores which have their own effective security systems. The smaller less protected stores may feel more readily influenced by the street situation. This implies, in the context of town centre management, the need for special attention to be given to security issues outside the central areas, especially the periphery of the town, to avoid these areas developing the "defensive" image of a "fortress city" (Oc and Tiesdale 1997b: 1).

There were no significant relationships at the 95% confidence level between type, size, and location of outlets, and levels of satisfaction with the attractiveness of the shopping environment and lighting. There was, therefore, general satisfaction with the physical shopping environment expressed by the different types of traders throughout the town.

The generally high levels of satisfaction with the amenity of the town centre, and the trader recognition of the improvement in the appearance of the streets suggests a positive outcome of the public investment in the town centre. As previously discussed, the awards by the Civic Trust provide further evidence to support this contention (Carmarthenshire County Council/WDA d no date; Civic Trust Press release 18 April 1997). Such high levels of satisfaction with amenity improvements are not unique to Llanelli, and have been identified in other UK surveys (DOE 1997a).

Trader attitudes to town centre management

The earlier analysis implied the need for special attention to be given to security issues outside the central areas of Llanelli town centre, especially the periphery of the town. These issues are typically associated with town centre management, which is a recommended part of the action required to enhance the vitality and viability of town centres (DOE 1994; DOE 1997a; DETR 1996; Medway *et al.* 1998; Oc and Tiesdale 1997a). In order to explore whether arrangements in Llanelli were considered adequate the traders were asked whether they were satisfied with town centre management. There was not a high level of satisfaction. 36 (30.5%) traders, a minority, were satisfied whereas 50 (42.4%) were dissatisfied or very dissatisfied with town centre management. The issue of town centre management is beginning to be tackled in the town centre. Since 1995 the Council and the traders have been represented on a Town Centre Trading Committee that is chaired by the manager of Woolworths, and considers a range of town centre management issues. The committee has the disadvantage that it does not have the benefit of full-time, and therefore dedicated, management resource. Such support could be relatively expensive, and the evidence from the trader survey was that the traders in the town were unlikely to be willing to contribute to those costs. When asked whether they would be prepared to contribute to future town centre management costs only 3 (2.5%) of Llanelli town centre traders indicated a willingness to do so. The implication is that in relatively less prosperous towns such as Llanelli there may be resistance to the idea recently floated by government to obtain funding for town centre management though increases in the business rate (DETR 2000b).

Trader views of the future of the town centre

In order to explore whether the changes to the town had brought greater confidence in the future of the centre the traders were asked whether they agreed with specific statements (Table 6.53). There was evidence of general confidence in the future, which implied recognition that the town had begun a recovery in its fortunes. 101 (84.9%) of traders agreed that they had a greater confidence in the town and its prospects for future improvement. Only 2 (1.7%) traders thought the centre would continue to decline.

Table 6.53

View of future of Llanelli town centre

Statements	No.	% of respondents
Greater confidence and prospects of further improvements	101	84.9
Pace of decline slowed, unlikely to be lasting improvement	16	13.4
Centre will continue to decline	2	1.7
Total	119	100

Source: 1997 Trader survey

Trader views on future requirement to improve the town

Traders were asked the ways in which they thought the town centre could be improved in order to consider which changes were most critically required to enhance the town centre as a shopping destination. The suggested improvements mentioned at least 3 times are set out in Table 6.54. The top five mentions were a desire for a better range of shops, more or free parking, more entertainment facilities, improvement of the remaining run down areas in the town, and better security. These views were broadly consistent with those relating to levels of satisfaction with the town, referred to earlier in the report. They support the view that the priority order for action to improve the town as a shopping destination relates to attractions (range of shops), accessibility (car parking), amenity (remaining run down areas), and town centre management (security). As previously discussed the perceived importance of the adequacy of these factors as components of a healthy town centre is well documented (DOE 1994; Evans 1997; Oc and Tiesdale 1997a; Page and Hardyman 1996; URBED 1999).

In order to explore possible funding sources for such improvements the traders were asked whether in principle they would be willing to contribute to the cost of improvements to the public realm or accessibility and car parking. Only 5 (4.1%) and 6 (4.9%) traders indicated they would pay respectively for those improvements. The cost of such further improvements would most likely have to be borne mainly by the public sector in Llanelli.

Table 6.54

Ways to improve the town

Ways to improve town	No. of mentions
Better range of shops	35
More/free parking	12
More entertainment facilities	10
Improve remaining run-down areas	8
Improve security	7
Complete shopping centre	6
Reduce rents/rates	5
Better/free public transport	3
Clean town better	3
More facilities for young	3
Promote town better	3

Source: 1997 Trader survey

Conclusions

This chapter provides preliminary conclusions on the impact of public investment in Llanelli town centre 1992-97 based on an analysis of trader perceptions and opinions (1997 Trader survey), discussion with Redrow and Sunlife (1997), supported by GOAD plan analysis.

The analysis suggests that though the prime areas of the town centre had traded relatively well 1992-97, overall the town centre had probably remained in decline during that period. The improved areas performed better than the unimproved areas in terms of turnover and employment change, but most of the traders did not think the better performance was a consequence of the changes to the town. The investment was of minor benefit to businesses in the town, and it enhanced the amenity of the town. It also played a part in securing the commitment of Redrow and Sunlife to build and fund the new St Elli shopping centre.

Whilst the amenity improvements did contribute to the revitalisation of the built fabric of the town it was apparent that the development of new shopping attractions, and improvements to car parking were regarded as critical issues that also required attention. Other town centre management issues such as the need to improve security in peripheral areas was also highlighted. The beneficial role that the new shopping centre with its additional car parking would play in restoring the fortunes of the town was generally acknowledged, and most of the traders expressed confidence about the town's future in 1997. The public investment in car parking, and site acquisition and development, was a pre-condition to the attraction of the private investment for the shopping centre. Without that public investment the St Elli shopping centre would not have proceeded, and there would have been little prospect of reversing Llanelli town centre's decline.

This chapter and the previous one have mainly explored residents' and trader perspectives on the impact of changes to Llanelli town centre. The next chapter compares the perspectives of those two groups to provide further insight of the impact of public investment on the regeneration of Llanelli town centre.

Chapter 7

Comparison of resident and trader perspectives

Introduction

This chapter explores whether there is a significant variation between the attitudes of the residents and the traders to changes in the town or levels of satisfaction with factors affecting its attractions, accessibility and amenity. The analysis was carried out because consideration of the degree of consistency between the attitudes of the two groups would help clarify the interpretation of the main findings of the surveys. The advantages of a multi-method research design that, in this case, facilitates a comparison of attitudes from different groups, is well documented and was elaborated in chapter 4 (Brannen 1992; Burgess 1982, 1991; Patton 1990: 187; Philip 1998). Comparisons between the attitudes of the residents and the traders were based on responses to identical questions included in the residents' and trader surveys.

Attitudes to attractions

As previously discussed, the range and quality of shopping and other facilities are key attractions that affect the vitality of town centres (Baldock 1989; Bianchini 1995; DOE 1992; DOE 1994; Evans 1997; Jacobs 1961; Montgomery 1990). In terms of attractions cross-tabulations were run between attitudes to specified changes and resident and trader categories. The Pearson Chi-Square test was then applied. There was no significant variation in the attitudes of the traders and the residents to the perceived change in the range of shops given that the majority in both groups had perceived a decline. Both groups also recognised that there had been no improvement in entertainment facilities although a significantly higher proportion of residents (142 or 88.8%) disagreed or strongly disagreed that entertainment facilities had improved, compared with traders (54 or 78.3%) (Table 7.1).

Table 7.1

Entertainment facilities have improved in Llanelli

Respondents	n	Attitudes % of respondents	
		Strongly agree/agree	Disagree/strongly disagree
Residents	160	11.3	88.8
Traders	69	21.7	78.3
Total	229	14.4	85.6

Above 95% confidence level

Chi-Square 4.300 df 1 Significance 0.038

Source: 1997 Residents' survey; 1997 Trader survey

In order to explore whether the attitudes concerning levels of satisfaction with attractions in Llanelli were consistent between the residents and the traders cross-tabulations were run between attitudes to change and resident and trader categories. The Pearson Chi-Square test showed that there was no significant variation, at the 95% confidence level, between the level of resident and trader satisfaction with banks and building societies, facilities for children, foodstores, range of entertainment facilities, restaurants and cafes, street events, and toilet facilities. There was, however, significant variation in the level of resident and trader satisfaction with other attractions (Tables 7.2-7.6). The main difference of opinion related to the level of satisfaction with price of goods.

Table 7.2

Level of satisfaction with price of goods

Respondents	n	Attitudes % of respondents	
		Satisfied/very satisfied	Dissatisfied/very dissatisfied
Residents	229	47.6	52.4
Traders	104	87.5	12.5
Total	333	60.1	39.9

Above 95% confidence level

Chi-Square 47.470 df 1 Significance 0.000

Source: 1997 Residents' Survey; 1997 Trader survey

109 (47.6%) residents were very satisfied or satisfied with price of goods compared with 91(87.5%) traders. This probably reflects the consumer desire for cheap goods, compared with the trader requirement for higher prices to assist business turnover. This potential conflict is not unique to Llanelli. It has been recognised in the UK that whilst the larger more efficient shops can supply cheaper goods to the advantage of the consumer, they can also draw trade from the small independent retail businesses who may then struggle to survive (Carley *et al.* 2001). It was also evident that compared with the Llanelli traders, a higher proportion of residents were very satisfied or satisfied with the indoor and outdoor market. Compared with the traders, a smaller proportion of residents were dissatisfied or very dissatisfied with the range of shops and variety stores.

Table 7.3

Level of satisfaction with indoor market in Llanelli

Respondents	n	Attitudes % of respondents	
		Satisfied/very satisfied	Dissatisfied/very dissatisfied
Residents	284	84.9	15.1
Trader	117	65.0	35.0
Total	401	79.1	20.9

Above 95% confidence level

Chi-Square 19.820 df 1 Significance 0.000

Source: 1997 Residents' survey; 1997 Trader survey

Table 7.4

Level of satisfaction with outdoor market in Llanelli

Respondents	n	Attitudes % of respondents	
		Satisfied/very satisfied	Dissatisfied/very dissatisfied
Residents	250	31.2	68.8
Traders	107	20.6	79.4
Total	357	28.0	72.0

Above 95% confidence level

Chi-Square 4.206 df 1 Significance 0.040

Source: 1997 Residents' survey; 1997 Trader survey

Table 7.5

Level of satisfaction with range of shops in Llanelli

Respondents	n	Attitudes % of respondents	
		Satisfied/very satisfied	Dissatisfied/very dissatisfied
Residents	286	25.9	74.1
Traders	121	14.9	85.1
Total	407	22.6	77.4

Above 95% confidence level

Chi-Square 5.879 df 1 Significance 0.015

Source: 1997 Residents' survey; 1997 Trader survey

Table 7.6

Level of satisfaction with variety stores in Llanelli

Respondents	n	Attitudes % of respondents	
		Satisfied/very satisfied	Dissatisfied/very dissatisfied
Residents	286	37.1	62.9
Traders	119	24.4	75.6
Total	405	33.3	66.7

Above 95% confidence level

Chi-Square 6.093 df 1 Significance 0.014

Source: 1997 Residents' survey; 1997 Trader survey

Notwithstanding these variations the message was clear. The majority of residents and traders were generally dissatisfied with shopping and other attractions in the town centre; and were only satisfied with banks and building societies and the indoor market.

Attitudes to accessibility

As previously discussed, the accessibility of a town centre to its catchment population can affect its trading performance (Bromley and Thomas 1993b; DOE 1994; Evans 1997; URBED 1999). The data were also analysed to explore whether there were significant differences between resident and trader attitudes to changes in the town centre that affected accessibility. There was no significant variation in the attitudes of the traders and the residents to car parking issues. A majority of both the residents and the traders thought car parking was inadequate despite the changes. As previously discussed, concern regarding the adequacy of car parking to serve town centre shopping areas is well documented (Bromley and Thomas 1993b; DOE 1994; Guy 1998b; Lockwood 1997b; Page and Hardyman 1996; URBED 1999; Williams 1991).

However, in other cases significant differences in attitude were identified, with residents responding more positively to the changes than the traders (Tables 7.7-7.9). 170 (57.4%) residents thought there was less congestion in the town centre because of the construction of the coastal link road, compared with 62 (50.8%) traders. 128 (71.5%) residents disagreed or strongly disagreed that that the new Stepney Place car park was badly located, compared with 50 (57.5%) traders. 100 (81.3%) residents agreed or strongly agreed that the new bus stops were well located, compared with 45 (55.6%) traders.

Table 7.7

Perceived effect of coastal link road on traffic congestion in Llanelli

Respondents	n	Attitudes % of respondents		
		Less congestion	Not less congestion	Don't know
Residents	296	57.4	15.9	26.7
Traders	122	50.8	32.0	17.2
Total	418	55.5	20.6	23.9

Above 95% confidence level

Chi-Square 14.793 df 2 Significance 0.001

Source: 1997 Residents' survey; 1997 Trader survey

Table 7.8

The new Stepney Place car park is badly located

Respondents	n	Attitudes % of respondents	
		Strongly agree/agree	Disagree/strongly disagree
Residents	179	28.5	71.5
Traders	87	42.5	57.5
Total	266	33.1	66.9

Above 95% confidence level

Chi-Square 5.211 df 1 Significance 0.022

Source: 1997 Residents' survey; 1997 Trader survey

Table 7.9

The new bus stops are well located

Respondents	n	Attitudes % of respondents	
		Strongly agree/agree	Disagree/strongly disagree
Residents	123	81.3	18.7
Traders	81	55.6	44.4
Total	204	71.1	28.9

Above 95% confidence level

Chi-Square 15.747 df 1 Significance 0.000

Source: 1997 Residents' survey; 1997 Trader survey

There was no significant variation in the attitudes of residents and traders in terms of their satisfaction with car parking and extent of pedestrian areas in the town centre. Both groups were especially satisfied with the extent of pedestrian access. However, there were differences with the residents tending to report higher levels of satisfaction than the traders (Tables 7.10-7.12). 124 (66.7%) residents were satisfied or very satisfied with direction signs, compared with 48 (47.1%) traders. 120 (80.5%) residents were satisfied or very satisfied with ease of access by public transport, compared with 50 (53.2%) traders. 204 (79.7%) residents were satisfied or very satisfied with ease of access by car, compared with 67 (57.8%) traders.

Table 7.10

Satisfaction with direction signs in Llanelli

Respondents	n	Level of satisfaction % of respondents	
		Very satisfied/satisfied	Dissatisfied/very dissatisfied
Residents	186	66.7	33.3
Traders	102	47.1	52.9
Total	288	59.7	40.3

Above 95% confidence level

Chi-Square 10.529 df 1 Significance 0.001

Source: 1997 Residents' survey; 1997 Trader survey

Table 7.11

Satisfaction with ease of access by public transport in Llanelli

Respondents	n	Level of satisfaction % of respondents	
		Very satisfied/satisfied	Dissatisfied/very dissatisfied
Residents	149	80.5	19.5
Traders	94	53.2	46.8
Total	243	70.0	30.0

Above 95% confidence level

Chi-Square 20.508 df 1 Significance 0.000

Source: 1997 Residents' survey; 1997 Trader survey

Table 7.12

Satisfaction with ease of access by car in Llanelli

Respondents	n	Level of satisfaction % of respondents	
		Very satisfied/satisfied	Dissatisfied/very dissatisfied
Residents	256	79.7	20.3
Traders	116	57.8	42.2
Total	372	72.8	27.2

Above 95% confidence level

Chi-Square 19.408 df 1 Significance 0.000

Source: 1997 Residents' survey; 1997 Trader survey

The analysis suggests that the residents tend to have a more positive attitude than the traders to several accessibility issues. However, these differences are not great. With the exception of car parking which was considered inadequate, neither the residents nor the traders thought accessibility issues in Llanelli town centre were major problems.

Attitudes to amenity

As discussed earlier, the amenity of a town centre reflects the extent to which it presents a pleasant, clean, well maintained and secure environment (DETR 2000b; DOE 1994; Evans 1997; Smith 1974; URBED 1999). Again, the data were analysed to explore whether there were significant differences between resident and trader attitudes to changes in the town centre that affected amenity. There was no significant variation in the attitudes of the traders and the residents to the perceived change in the appearance of the new Stepney place car park, the pleasantness of the shopping experience, the new bus stop design and the feeling of safety in the streets. The majority of residents and traders thought the new Stepney Place car park had a pleasant appearance. However, there was one significant variation at the 95% confidence level (Table 7.13).

Table 7.13

The appearance of the streets has been improved

Respondents	n	Attitudes % of respondents	
		Strongly agree/agree	Disagree/strongly disagree
Residents	265	68.3	31.7
Traders	112	84.8	15.2
Total	377	73.2	26.8

Above 95% confidence level

Chi-Square 10.954 df 1 Significance 0.001

Source: 1997 Residents' survey; 1997 Trader survey

95 (84.8%) traders agreed or strongly agreed the appearance of the streets had been improved compared with 181 (68.3%) residents. In contrast to earlier findings, this was an instance where the traders had a more positive attitude to change than the residents, a finding that will be discussed later in the chapter.

There was no significant variation in the attitudes of the residents and traders in terms of their satisfaction with the attractiveness of the shopping environment, lighting, and feeling of safety. Both the residents and the traders were especially satisfied with lighting and the attractiveness of the shopping environment. However, in other cases significant differences in attitude were identified, again with residents reporting higher levels of satisfaction than the traders (Tables 7.14-7.16).

Table 7.14

Satisfaction with street cleaning in Llanelli

Respondents	n	Level of satisfaction % of respondents	
		Very satisfied/satisfied	Dissatisfied/very dissatisfied
Residents	278	74.1	25.9
Traders	118	61.0	39.0
Total	396	70.2	29.8

Above 95% confidence level

Chi-Square 6.779 df 1 Significance 0.009

Source: 1997 Residents' survey; 1997 Trader survey

Table 7.15

Satisfaction with condition of buildings in Llanelli

Respondents	n	Level of satisfaction % of respondents	
		Very satisfied/satisfied	Dissatisfied/very dissatisfied
Residents	274	63.9	36.1
Traders	109	51.4	48.6
Total	383	60.3	39.7

Above 95% confidence level

Chi-Square 5.084 df 1 Significance 0.024

Source: 1997 Residents' survey; 1997 Trader survey

Table 7.16

Satisfaction with crime prevention measures in Llanelli

Respondents	n	Level of satisfaction % of respondents	
		Very satisfied/satisfied	Dissatisfied/very dissatisfied
Residents	247	64.0	36.0
Traders	110	44.5	55.5
Total	357	58.0	42.0

Above 95% confidence level

Chi-Square 11.784 df 1 Significance 0.001

Source: 1997 Residents' survey; 1997 Trader survey

206 (74.1%) residents were satisfied or very satisfied with street cleaning compared with 72 (61.0%) traders. 175 (63.9%) residents were satisfied or very satisfied with the condition of buildings compared with 56 (51.4%) traders. 158 (64.0%) residents were satisfied or very satisfied with crime prevention measures, compared with 49 (44.5%) traders.

Attitudes to private sector investment

The more positive attitude of the residents, compared with traders, was also identified in terms of perceptions of changing levels of private sector investment in the town (Table 7.17). 69 (57.0%) residents agreed or strongly agreed that investment by the private sector had increased, compared with 19 (30.2%) traders.

Table 7.17

Investment by the private sector has increased

Respondents	n	Attitudes % of respondents	
		Strongly agree/agree	Disagree/strongly disagree
Residents	121	57.0	43.0
Traders	63	30.2	69.8
Total	184	47.8	52.2

Above 95% confidence level

Chi-Square 11.984 df 1 Significance 0.001

Source: 1997 Residents' survey; 1997 Trader survey

Views of the future of the town centre

Again, cross-tabulations were run to compare the attitudes of the traders and the residents to the future of the town centre. There was no significant variation at the 95% confidence level. The vast majority of the residents and the traders agreed they had a greater confidence in the town and its prospects for future improvement.

Conclusions

A comparison of resident and trader attitudes to changes in the town and levels of satisfaction identified a consistent view that the amenity improvements did contribute to the revitalisation of the built fabric. The residents and the traders also identified the need for new shopping attractions and improvements to car parking as critical issues that also required attention. Compared with the traders proportionally more residents reported higher levels of satisfaction with certain indicators of the town's attractions (range of shops), accessibility (ease of access), and amenity (street cleaning, crime prevention measures). The residents were also far more conscious of the new private investment that had been attracted to the town centre. The generally more positive attitudes of residents compared to retailers appears to fit the pattern identified by Hass-Klau (1993) in relation to the impact of pedestrianisation schemes, referred to in chapter 6.

However, a higher proportion of the Llanelli traders thought the appearance of the streets had improved compared with the residents. This is an interesting finding because improving the appearance of the streets was the focus of substantial public investment. Two reasons might account for the differences in the attitudes of the residents and the traders. Firstly, the traders are probably more familiar with the town centre and the way it has changed. Most traders visit the town on a daily basis because they work there, whereas the residents would have mainly visited the town to shop on a less frequent basis. Secondly, the traders might be more aware of the strengths and limitations of the town centre and the way it has changed because the state of the town centre and its change could affect their livelihood. Compared with the residents the traders may therefore be more dissatisfied with the factors identified because they are more concerned that they might adversely affect their trade. In relation to the changing appearance of the streets the traders may be more familiar with the changes and they may value them more as a help to their business than the residents do as benefit to their shopping experience. Notwithstanding these attitudinal differences the key message is that the great majority of both groups thought the appearance of the streets had improved, indicating a positive outcome of the public investment on the amenity of the town centre.

So far the thesis has explored mainly resident and trader perspectives on the role and use of Llanelli town centre as well as the impact of the changes to the town. The next chapter investigates the competitive status of Llanelli and explores the role that public investment may have played in affecting that status.

Chapter 8

The competitive status of Llanelli town centre

Introduction

The previous chapter explored variations between the attitudes of residents and traders to changes in the town or levels of satisfaction with factors affecting its attractions, accessibility and amenity. This chapter looks at Llanelli and its competitors, its changing competitive position, and variations in the socio-economic characteristics of residents using Llanelli compared with competitor locations. The chapter also explores the extent to which changes in Llanelli's competitive position might have been affected by the changing environment of the town centre. The chapter draws on information from the residents' and trader surveys, as well as from published and other reports.

Town centre competitor locations

The main town centre competitors within the sphere of influence of Llanelli are Cardiff, Carmarthen, Neath, Port Talbot, and Swansea (see Fig 5). Cardiff and Swansea are major cities. Carmarthen, Neath and Port Talbot are the largest towns in relatively close proximity to Llanelli. A brief description of these main competitor town centres is provided below.

Cardiff

Cardiff is the largest city in South Wales, with an urban population of some 272,000 (Donaldsons1997b). It is a strong regional centre with an estimated 155,200 sq m. gross retail floorspace, zone A rents of £150 per sq ft, and prime retail yields of 4.5% (Donaldsons1997b). Cardiff's shopping facilities have been improved with investment in the public realm and the provision of new attractions such as the Capital Centre and the Queens Arcade. "Cardiff is a major centre nationally and continues to be a focus for public and private sector investment. Its role is significant and this is likely to be enhanced further in the near future" (Donaldsons 1997b: 40).

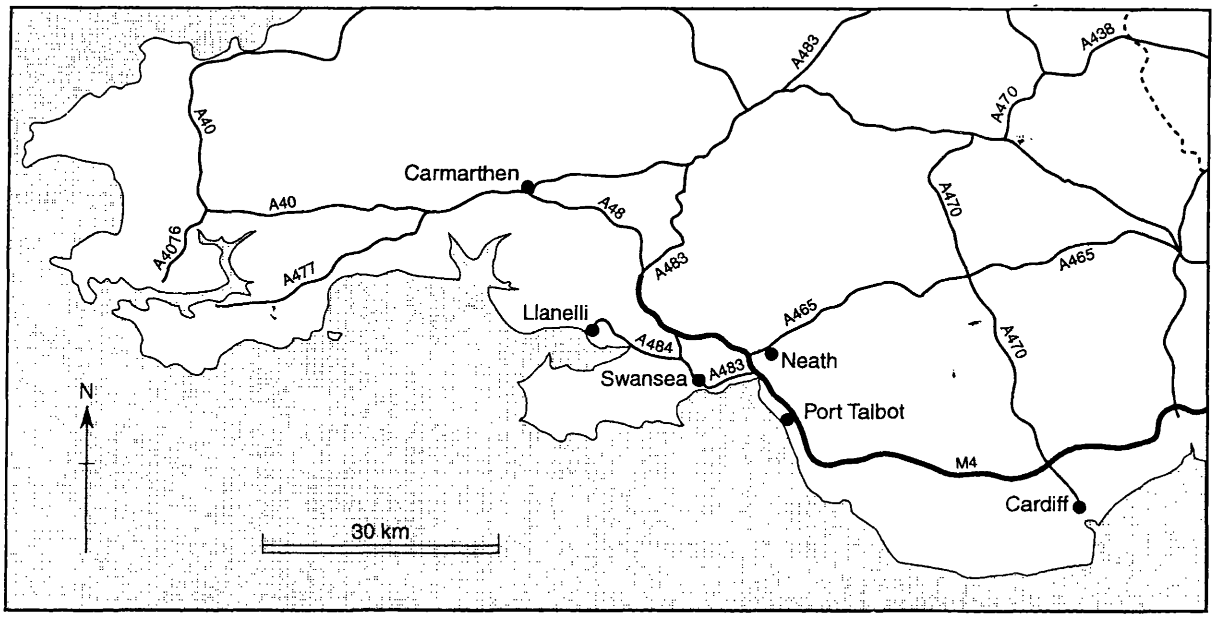

Fig 5: Location of main competitor towns

Swansea

Swansea is the second largest city in South Wales, with an urban population of some 190,000 (Donaldsons1997b). It is an important regional centre with an estimated 138,800 sq m. gross retail floorspace, zone A rents of £115 per sq ft, and prime retail yields of 7.0% (Donaldsons1997b). In June 1997 URBED published a report, "Securing the future of Swansea city centre", that reviewed the health of the city centre. Some of the main findings were that Swansea ranked among the 30 largest cities in Britain, with its retail success due to its good range of comparison shops, and a popular market. There was strong demand for retail space in the centre, but pedestrian flow had been falling in the fringes. URBED (1997) noted that in the previous decade Swansea had fallen in terms of its ranking as a shopping centre as other towns had developed and improved their centres.

Carmarthen

Carmarthen is an important local market town and service centre in west Wales, with an urban population of some 13,600 (Donaldsons1999b). It has an estimated 57,800 sq m. gross retail floorspace, zone A rents of £50-60 per sq ft, and prime retail yields of 7.5% (Donaldsons 1999). In 1999 Donaldsons published a report, "Carmarthen Action Plan" that reviewed the health of the city centre and argued on balance that Carmarthen is " a vital and viable centre" (Donalsons 1999: 26). They considered that it is a diverse and multi-functional centre, with relatively low vacancy rates, good car parking facilities, good retailer representation, high comparative rental levels, stable yields, and a blend of historic and modern architecture. Donaldsons thought that "Carmarthen's major weaknesses are outside of the retail sector...It lacks tourist and leisure attractions which blend with ...[its].. retailing" (Donaldsons 1999:26).

Neath

Neath is a significant local centre, with an urban population of some 45,600 and an estimated 58,025 sq m. gross retail floorspace (Donaldsons 1997b). The town's public realm and attractions were improved in the early 1990s following a public sector led regeneration strategy that secured private sector retail investment. It now has a wide range of food and comparison shopping facilities, including Marks and Spencer, and a popular indoor market.

Port Talbot

Port Talbot is a less significant local centre than Neath, with an urban population of some 38,000 and an estimated 35,041 sq m. gross retail floorspace (Donaldsons 1997b). Its main town centre shopping development is the Aberafan shopping centre, which includes a range of national multiples and a market. At the time of the residents' and trader surveys the centre was anchored by convenience retailing, including Tesco and Iceland (Donaldsons1997b).

Out of town competitor locations

Llanelli is also within the sphere of influence of a number of out of town retail facilities. In 1992 Management Horizons estimated that, "A total of 243,000 net sq ft of retail space exist[ed] in the ..[Llanelli]... catchment area", mainly at Cross Hands (104,000 sq ft) and Trostre Park (112,000 sq ft) (Management Horizons 1992: 19). They also estimated that 93,000 sq ft of this floorspace was food retailing, the remainder being DIY, furniture and footwear (Management Horizons 1992:19).

Trostre Park, a retail park about 2 km south east of Llanelli, is an especially significant competitor to Llanelli town centre because of its location and its size. It contains a large Tesco foodstore (68,000 sq ft gross; 42,000 sq ft net) that operates a free bus service and has a shared 700 space surface car park. The foodstore was opened in 1989, and resulted in the closure of the Tesco store in Llanelli town centre, which was an important anchor to that town at the time. Trostre Park also contains a number of retail warehouses including Halfords, MFI, Carpetright, Fads, Shoe City, Hyper Value Foods, Poundstretcher, and Great Mills (Drivers Jonas 1995).

Though further afield, Swansea Enterprise Park also includes some 53,215 sq m. gross (39,466 sq m net) major out of town retail developments close to junctions 44 and 45 of the M4 motorway, east of Llanelli. "Retail representation..is...significant, occupiers including Comet, B&Q, Shoe City, Allied Carpets, Pound Stretcher, Currys and World of Leather" (Donaldsons 1997b:12-13). The Enterprise Zone especially offers the consumer the benefits of "convenience, easy parking and a good range of stores and variety of goods" (Bromley and Thomas 1993c: 234).

Perceived change in the competitive position of Llanelli town centre

In order to explore the impact of public investment on Llanelli town centre, the residents familiar with the other towns were asked whether they thought that Llanelli town centre had improved, declined or remained the same in recent years relative to Cardiff, Carmarthen, Neath, Port Talbot and Swansea (Table 8.1).

Table 8.1

Perception of change of Llanelli town centre relative to specified town

Towns	n	Perception of change % of respondents			
		Improved	Declined	Same	Don't know
Cardiff	93	10.8	80.6	6.5	2.2
Carmarthen	150	10.0	72.7	16.7	0.7
Neath	19	26.3	31.6	26.3	15.8
Port Talbot	3	33.3	0	66.7	0
Swansea	215	11.2	60.9	23.7	4.2

Source: 1997 Residents' survey

Note: Responses drawn from those who shopped at least twice a year in the specified towns

The majority of residents thought that Llanelli town centre had declined in recent years relative to Cardiff (75 or 80.6%), Carmarthen (109 or 72.7%) and Swansea (131 or 60.9%). The results for Neath should be treated cautiously because of the small numbers involved, but a lower proportion of residents thought Llanelli town centre had declined relative to that town centre (6 or 31.6%) compared with Cardiff, Carmarthen, and Swansea. There were too few responses for Port Talbot to draw conclusions.

Data from the 1997 trader survey also provides some insight into the competitive position of Llanelli town centre relative to the other selected towns. In order to explore whether Llanelli was in decline relative to other town centres, traders with shops in other selected centres were asked to compare the change of turnover in Llanelli since 1992 relative to the change of turnover in the other centres. The results, which are set out in Table 8.2, should be treated cautiously because of the small number of traders that responded. However, the data imply that Llanelli declined relative to Cardiff, Carmarthen and Swansea, which corroborates the views of residents. In these 3 towns or cities at least 50% more Llanelli traders reported turnover decreases relative to other towns, than reported turnover increases. In Neath the differences were less pronounced and in Port Talbot the number was the same.

Table 8.2

Turnover change in Llanelli relative to other towns 1992-97

Towns	n	Turnover change No. of respondents			
		Increase	Decrease	Same	Don't Know
Cardiff	24	6	9	1	8
Carmarthen	27	4	9	7	7
Neath	25	4	6	8	7
Port Talbot	20	5	5	3	7
Swansea	31	5	12	4	10

Source: 1997 Trader survey

Despite the public investment in environmental improvements in Llanelli town centre in the period prior to 1997, the perception of the residents and the traders was that Llanelli town centre had declined relative to Carmarthen, Cardiff, and Swansea. It is difficult to draw firm conclusions from the data in relation to Neath, and Port Talbot, because of the relatively small number of responses from the surveys. However, change in relation to Neath appeared to have been small, and there may have been an improvement in relation to Port Talbot. Although the environment in Llanelli had been improved the perceived decline may have been partly because Llanelli's attractions had declined relative to Carmarthen, Cardiff, and Swansea.

Data on change in the number of multiple stores, and Llanelli's changing position in the UK rankings, both indicators of attractions, provides further insight into the issue of Llanelli's changing competitive status (Tables 8.3-8.4).

Table 8.3

Changing multiple counts for specified towns 1989-1995

Towns	1995	1989	1989-1995	% 1989-1995
Cardiff	115	74	+41	55
Carmarthen	25	16	+9	56
Llanelli	23	17	+6	35
Neath	23	18	+5	28
Port Talbot	12	11	+1	9
Swansea	71	55	+16	29

Source: 1995 Hillier Parker May and Rowden (1996)
1989 Hillier Parker, Chas E Goad and Oxford Institute of Retail Management (1991)

Note: Data 1989 and 1995 are not strictly comparable as different facia definitions were used to define a multiple store

Table 8.4

Changing ranking of selected towns based on multiple counts 1984-1995

Towns	Rank 1995	Rank 1984	Rank change 1984-1995	% Rank change 1984-1995
Cardiff	8	11	+3	27
Carmarthen	211	241	+30	12
Llanelli	229	241	+12	5
Neath	229	241	+12	5
Port Talbot	363	307	-56	-18
Swansea	54	19	-35	-184

Source: Hillier Parker May and Rowden (1996)

Firstly, the percentage increase in multiple stores in Llanelli 1989-1995 (35% or +6), was greater than that for Neath (28% or +5), Port Talbot (9% or +1), and Swansea (29% or +16), but less than that for Carmarthen (56% or +9) and Cardiff (55% or +41). Secondly, Llanelli's percentage increase in the UK retail rankings (5% or +12) was similar to Neath's (5% or +12), greater than Port Talbot's (-56 or -18%) and Swansea's (-35 or-184%), but less than Carmarthen's (12% or +30) and Cardiff's (27% or +3). In terms of attractions, therefore, Llanelli may have declined relative to Carmarthen and Cardiff, remained broadly on a par with Neath, but may have improved relative to Port Talbot, and possibly also Swansea. Notwithstanding this, Swansea's multiple store count increased 1989-1995 by 16 compared with Llanelli's increase of 6. The larger increase in the range of multiple shops in Swansea probably explains why the residents and traders thought that Llanelli had declined relative to Swansea as well as in relation to Carmarthen, and Cardiff.

Llanelli's main competitor town centres

Since the early 1990s, Carmarthen and Swansea have been perceived as being the two town centres that have most strongly competed with Llanelli town centre as retail destinations. In 1990 BDP thought that, "The two towns within the sphere of influence of Llanelli ....[were]... Swansea and Carmarthen" (BDP 1990: para7.1). In 1992

Management Horizons (1992) confirmed the view that Swansea and Carmarthen were the two major centres competing with Llanelli, with Cardiff being used for occasional shopping trips. They said:

> "Swansea is Llanelli's main competing centre offering a strong mix of larger stores and high street multiples. Anchored by four department stores and five variety stores including Debenhams and Marks & Spencer, Swansea houses a good selection of mainly middle market fashion multiples. Swansea is also well represented by specialist multiples in toiletries & cosmetics, leisure goods and electrical goods and despite having a reputation as being dowdy, the town centre will attract comparison shoppers from the Llanelli catchment area on a fairly regular basis.
>
> Carmarthen is similar to Llanelli in terms of size and tenant mix - both towns are anchored by Marks & Spencer and offer the same number of multiple stores. Carmarthen differs from Llanelli only in womanswear offering a greater choice with six specialist womenswear multiples to only two in Llanelli. A proportion of catchment residents to the north and west of Llanelli will shop in Carmarthen but this leakage will be small due to the proximity of Swansea which represents a superior alternative" (Management Horizons 1992:20).

The residents' survey provided evidence that suggested that Swansea and Carmarthen remained the main town centres that competed with Llanelli town centre in 1997, but that Swansea offered by far the strongest competition. The residents were asked whether they shopped at least twice a year in Cardiff, Carmarthen, Neath, Port Talbot and Swansea (Table 8.5). The majority of residents shopped in Carmarthen (154 or 53.7%) and Swansea (224 or 77.5%) at least twice a year.

Table 8.5
Frequency of shopping at least twice a year in specified locations

Location	No.	% of residents
Cardiff	96	34.5
Carmarthen	154	53.7
Neath	19	7.0
Port Talbot	4	1.5
Swansea	224	77.5

Source: 1997 Residents' survey

The residents were also asked where they carried out the majority of their grocery, clothes, furniture, electrical, and DIY shopping in order to identify the main locations that were in competition with Llanelli town centre. The data were presented in a previous chapter (Tables 5.10-5.14). Swansea competed with Llanelli town centre as a main shopping location for clothes (92 or 31.3%), and furniture shopping (52 or 22.6%), but only a small number of residents (11 or 3.7%) identified Carmarthen as a location for the majority of their clothes shopping. Carmarthen did, however, feature more strongly as a competitor location for occasional clothes shopping (23 or 16.0%). Overall the evidence suggests that Carmarthen and Swansea are the main competitor town centres to Llanelli town centre, but Swansea is by far the strongest competitor. The competitive status of Llanelli town centre relative to Swansea and Carmarthen town centres is now explored in more detail.

The competitive status of Llanelli relative to Swansea

Since Llanelli town centre is lower than Swansea in the UK retail rankings, then it would be expected that residents would perceive characteristics of its attractions, but not necessarily characteristics of accessibility, or amenity as being worse than those in Swansea town centre. In order to explore this issue further the residents were asked whether they thought certain characteristics were better or worse in Swansea than in Llanelli town centre (Tables 8.6).

Table 8.6

Residents' views of characteristics of Llanelli town centre compared with Swansea

Characteristics	n	Comparison of Llanelli v. Swansea % of respondents					
		Don't know	Much worse	Worse	Same	Better	Much better
Car parking	216	7.9	11.1	19.9	15.7	33.8	11.6
Ease of access by car	215	7.4	5.6	9.3	33.0	39.5	5.1
Ease of access by public transport	216	47.7	7.9	6.5	23.6	12.0	2.3
Price of goods	217	10.6	8.3	18.0	50.7	12.0	0.5
Range of entertainment facilities	216	18.1	32.9	40.3	4.2	1.9	2.8
Range of shops	217	0.5	41.0	52.1	1.8	3.2	1.4
Shopping environment	215	0.9	22.8	55.3	10.7	9.8	0.5

Source: 1997 Residents' survey

Note: Responses drawn from those who shopped at least twice a year in Swansea

Despite improvements to Llanelli, and the decline of Swansea in the UK rankings, Llanelli town centre did not compete well with Swansea in terms of its attractions, or its shopping environment; but it did offer some advantages in terms of its accessibility by car. 202 (93.1%) residents, a majority, respectively thought the range of shops was much worse or worse in Llanelli town centre than in Swansea. 168 (78.1%) residents thought the shopping environment was much worse or worse in Llanelli town centre than in Swansea. 158 (73.2%), a majority, thought the range of entertainment facilities was much worse or worse in Llanelli town centre than in Swansea. On the other hand, 96 (44.6%) and 98 (45.4%) residents respectively thought that ease of access by car, and car parking, was better or much better in Llanelli town centre than in Swansea. As previously discussed, adequate car parking is recognised as a factor that is of concern to UK shoppers (Bromley and Thomas 1993b; DOE 1994; Guy 1998b; Lockwood 1997b; Page and Hardyman 1996; URBED 1999; Williams 1991). The perceived better range of shops in Swansea, than in Llanelli town centre, in 1997 was consistent with data on the number of multiple stores in the two towns, and the relative ranking of those towns in the UK in 1995. In 1995 Llanelli was ranked 236 out of 979 towns with 23 non food multiples, and Swansea that was ranked 56 with 71 multiples (Hillier Parker May and Rowden, 1996). This analysis confirms the need for new attractions in Llanelli town centre to improve its competitive position, as well as the need for further improvements to the shopping environment. These are factors that are commonly identified in the UK as affecting the competitive status of shopping destinations (DOE 1994; Evans 1997; Oc and Tiesdale 1997a; Page and Hardyman 1996; URBED 1999).

In order to understand better the changing competitive status of Llanelli town centre, the residents were asked, in an open question, to give reasons for the perceived decline of Llanelli town centre relative to Swansea. The reasons mentioned at least five times were tabulated (Tables 8.7).

Table 8.7

Reason for decline of Llanelli relative to Swansea

Reason	No. of mentions
More variety/better shops in Swansea	44
Relatively more investment in Swansea	16
Mess/disruption in Llanelli	13
Cannot compare towns	8
Nicer/better environment/more character in Swansea	6

Source: 1997 Residents' survey

The perceived reasons for the decline of Llanelli town centre relative to Swansea were the better shopping facilities (44 mentions), and higher investment (16 mentions), in

Swansea, coupled with the negative effects of disruption (13 mentions) in Llanelli town centre. Again, these findings suggest that Llanelli town centre especially requires new attractions to enhance its competitive status. Very few residents (6 mentions) thought the decline was due to a better environment in Swansea. That may have partly reflected the relative improvement to the environment in Llanelli, but it also may reflect the lower priority residents might generally give to amenity issues compared to attractions when they take decisions that influence their shopping behaviour.

Changing use of Swansea town centre

In order to explore further the competitive status of Llanelli town centre relative to Swansea the residents were asked whether their use of Swansea had changed (Table 8.8).

Table 8.8

Changing use of Swansea town centre for shopping

Level of use	No.	% of respondents
Same	116	45.5
Less often	89	34.9
More often	50	19.6
Total	255	100

Source: 1997 Residents' survey

More residents visited Swansea less often than they used to, compared with those who visited the centre more often. For those residents who thought their use of Swansea town centre for shopping had changed (139 or 54.5%), 89, a majority, used the town less often compared with only 50 who used the town more often. Despite the more favourable view of Swansea city centre compared with Llanelli, only 20% claimed to visit Swansea more often than before. A relatively higher proportion (35%), were using Swansea less than before, but, as discussed later, an examination of the reasons shows that this was principally for personal mobility reasons.

To explore whether there was any evidence to suggest that changes to Llanelli town centre may have influenced the changing use of Swansea town centre, the residents' were asked to give reasons for using Swansea town centre more or less often (Tables 8.9-8.10).

Table 8.9

Reason for using Swansea town centre more often

Reasons	No.	% of respondents
Better shopping facilities	20	40.0
Nicer or better town/environment	6	12.0
Dissatisfied with Llanelli	4	8.0
Improved/good public transport	3	6.0
Moved nearer	3	6.0
Work there now	3	6.0
More time now	1	2.0
Other	10	20.0
Total	50	100

Source: 1997 Residents' survey

Table 8.10

Reason for using Swansea town centre less often

Reasons	No.	% of respondents
Reduced mobility due to age/health	20	27.8
Dissatisfied with Swansea	16	22.2
Less time	5	6.9
Lost access to car	4	5.6
Moved further away	4	5.6
Inconvenience (travel time/cost/distance)	3	4.2
Llanelli town centre improved	2	2.8
Less income	2	2.8
Out of town shopping centres improved	1	1.4
Other	15	20.8
Total	72	100

Source: 1997 Residents' survey

Those residents who gave reasons for using Swansea town centre more thought it was primarily because the shopping facilities were better (20 or 40.0%). Only a small number of residents 4 (8.0%) used Swansea more because they were dissatisfied with Llanelli town centre. Swansea town centre was mainly used less often because of the reduced mobility of the residents (20 or 27.8%), or their dissatisfaction with the town (16 or 22.2%). The influence of personal mobility on residents' choice of UK shopping destinations is well documented (Bromley and Thomas 1995; Guy 1998a; Thomas and Bromley 1995: Montgomery 1990; Westlake 1993). Only 2 (2.8%) residents used Swansea less because of improvements to Llanelli town centre. This suggests that the environmental improvements in Llanelli town centre had little impact on changing shopping behaviour.

Variation in the types of residents using Swansea more or less

Cross-tabulations were run in order to explore whether there were any variations between the types of residents who used Swansea town centre most frequently, or those who used the town centre more often than they used to for shopping. The variables chosen were age composition of household, age of principal shopper, car ownership, employment status, household size, location and social class. The application of the Pearson Chi-Square test identified no significant relationships at the 95% confidence level in relation to frequency of visits, but several significant relationships regarding the changing use of the town centre (Tables 8.11-8.14).

Table 8.11

Residents' changing use of Swansea town centre

Car ownership	n	Changing use % of respondents		
		More often	Less often	Same
Own car	210	20.0	31.4	48.6
No car	39	17.9	53.8	28.2
Total	249	19.7	34.9	45.4

Above 95% confidence level

Chi-Square 7.807 df2 Significance 0.020

1997 Residents' survey

Table 8.12

Residents' changing use of Swansea town centre

Age	n	Changing use % of respondents		
		More often	Less often	Same
Under 30	27	33.3	18.5	48.1
30-44	53	30.2	28.3	41.5
45-59	69	18.8	27.5	53.6
60+	104	11.5	47.1	41.3
Total	253	19.8	34.8	45.5

Above 95% confidence level

Chi-Square 18.927 df6 Significance 0.004

1997 Residents' survey

Table 8.13

Residents' changing use of Swansea town centre

Age composition	n	Changing use % of respondents		
		More often	Less often	Same
Adult(s)+child(ren) under 16	45	26.7	37.8	35.6
All aged 16-59	76	23.7	25.0	51.3
Mix of under 60+ over 60	22	22.7	22.7	54.5
All 60+	97	10.3	46.4	43.3
Total	240	18.8	35.8	45.4

Above 95% confidence level

Chi-Square 15.017 df6 Significance 0.020

1997 Residents' survey

Table 8.14

Residents' changing use of Swansea town centre

Size of household	n	Changing use % of respondents		
		More often	Less often	Same
1	47	14.9	57.4	27.7
2	107	15.9	31.8	52.3
3 or 4	81	23.5	28.4	48.1
5 or more	17	41.2	23.5	35.3
Total	252	19.8	34.9	45.2

Above 95% confidence level

Chi-Square 19.534 df6 Significance 0.003

1997 Residents' survey

A higher proportion of the car-less, the older, and those living alone or those with children under 16, used Swansea town centre less often than they used to (Tables 8.11-8.14). 21 (53.8%) residents without a car used Swansea town centre less often compared with 66 (31.4%) car owners. 49 (47.1%) residents (principal shoppers) aged 60+ used Swansea town centre less than they used to compared with 5 (18.5%) who were under 30. 45 (46.4%) residents in homes that comprised occupants of 60+ and 17 (37.8%) who had children under 16, used the town less often compared with 19 (25.0%) residents all aged 16-59. 27 (57.4%) residents who lived alone used Swansea town centre less often than they used to compared with 4 (23.5%) residents who lived in homes occupied by 5 or more persons. This suggests that the less mobile residents were using Swansea less often than they used to, and emphasises the importance of personal mobility factors in influencing changing use rather than the characteristics of the shopping centres. As previously discussed, this is a finding that that has been identified elsewhere (Bromley and Thomas, 1995; Guy 1998a; Thomas and Bromley, 1995: Montgomery 1990; Westlake 1993).

Overview regarding the competitive position of Llanelli relative to Swansea

Whilst Llanelli was well placed to compete with Swansea in terms of its accessibility, the public investment in environmental improvements, without new attractions, were insufficient to significantly enhance its competitive position. Some progress had, however, been made. For example, the gap in the UK retail rankings between Llanelli and Swansea had closed 1989-1995 (Hiller Parker May and Rowden 1996), and conditions were ripe for the provision of major new attractions in the town. By 1997 there was some evidence of a confidence in the market place that Llanelli's competitive position was poised to improve because of the plans for a new shopping centre. In considering Carmarthen, Llanelli, Neath, and Port Talbot as competing locations to Swansea for an audit and health check on Swansea city centre, Donaldsons (1997b), said:

> "Competition from Llanelli for mainstream and some high value comparison trade (and convenience trade associated with the Asda's superstore) will intensify in the near future and will influence Swansea's ability to increase its market share. This is the only centre close to Swansea where competition is likely to increase" (Donaldsons 1997b: 44).

The competitive status of Llanelli relative to Carmarthen

Since Llanelli town centre is lower than Carmarthen in the UK retail rankings then it would be expected that residents would perceive characteristics relating to its attractions, but not necessarily its accessibility, or amenity as being worse than those in Carmarthen town centre. In order to explore this issue further the residents were asked whether they thought certain characteristics were better or worse in Carmarthen than in Llanelli town centre (Table 8.15).

Table 8.15

Residents' views of characteristics of Llanelli town centre compared with Carmarthen

Characteristics	n	Comparison of Llanelli v. Carmarthen % of respondents					
		Don't know	Much worse	Worse	Same	Better	Much better
Car parking	145	4.8	10.3	33.8	30.3	17.9	2.8
Ease of access by car	145	6.9	4.8	13.8	33.1	39.3	2.1
Ease of access by public transport	144	56.3	4.2	4.9	19.4	13.9	1.4
Price of goods	145	9.7	6.2	9.7	57.9	15.2	1.4
Range of entertainment facilities	144	43.8	11.1	18.8	19.4	5.6	1.4
Range of shops	147	0.7	25.2	56.5	7.5	9.5	0.7
Shopping environment	147	0	27.2	45.6	17.0	9.5	0.7

Source: 1997 Residents' survey

Note: Responses drawn from those who shopped at least twice a year in Carmarthen

Despite improvements, Llanelli town centre did not compete well with Carmarthen in terms of its attractions, or its shopping environment; but it did offer some advantages in terms of its accessibility by car. 120 (82.7%) residents, a majority, thought the range of shops was much worse or worse in Llanelli town centre than in Carmarthen. 107 (72.8%) residents thought the shopping environment was much worse or worse in Llanelli town centre than in Carmarthen. On the other hand, 60 (41.4%) residents thought that ease of access by car was better or much better in Llanelli town centre than in Carmarthen. The perceived better range of shops in Carmarthen, than in Llanelli town centre, in 1997 was consistent with data on the number of multiple stores in the towns, and the relative ranking of those towns in the UK in 1995. In 1995 Llanelli was ranked 236 out of 979 towns with 23 non food multiples, and Carmarthen was ranked 217 with 25 multiples (Hillier Parker May and Rowden 1996). Again, this analysis confirms the need for new attractions in Llanelli town centre to improve its competitive position, as well as the need for further improvements to the shopping environment.

In order to understand better the changing competitive status of Llanelli town centre relative to Carmarthen, the residents were asked to give reasons for the perceived decline of Llanelli town centre relative to Carmarthen. The reasons mentioned at least five times were tabulated (Table 8.16).

Table 8.16

Reason for decline of Llanelli relative to Carmarthen

Reason	No. of mentions
More variety/better shops in Carmarthen	36
Nicer/better environment/more character in Carmarthen	27
Mess/disruption in Llanelli	14
Loss of character in Llanelli	5
Relatively more investment in Carmarthen	5

Source: 1997 Residents' survey

The perceived reason for the decline of Llanelli town centre was the better shopping facilities (36 mentions), and better environment (27 mentions), in Carmarthen, coupled with the negative effects of mess/disruption (14 mentions) in Llanelli town centre. Again this analysis suggests that Llanelli town centre especially requires new attractions to enhance its competitive status, and further improvements to the shopping environment. As previously discussed, these are factors that others have identified as capable of affecting the competitive status of shopping destinations (DOE 1994; Evans 1997; Oc and Tiesdale 1997a; Page and Hardyman 1996; URBED 1999).

Changing use of Carmarthen town centre

In order to explore further the competitive status of Llanelli town centre relative to Carmarthen the residents were asked whether their use of Carmarthen had changed (Table 8.17).

Table 8.17

Changing use of Carmarthen town centre for shopping

Level of use	No.	% of respondents
Same	116	52.2
Less often	60	27.1
More often	45	20.4
Total	221	100

Source: 1997 Residents' survey

More residents visited Carmarthen less often than they used to, compared with those who visited the centre more often. As for Swansea, however, the reasons for visiting Carmarthen less often relate to personal mobility. For those residents who thought their use of Carmarthen town centre for shopping had changed (105 or 47.5%), 60, a majority, used the town less often compared with only 45 who used the town more often. Whilst this suggests that Carmarthen's vitality may have declined in the years prior to 1997, other evidence referred to earlier showed the town had risen proportionately more than Llanelli and Swansea in the UK retail rankings 1989-1995 (Hiller Parker May and Rowden 1996), and that it was "vital and viable" in 1997 (Donaldsons 1999: 26).

To explore whether there was any evidence to suggest that changes to Llanelli town centre may have influenced the changing use of Carmarthen town centre, the residents were asked to give reasons for using Carmarthen town centre more or less often (Tables 8.18-8.19).

Table 8.18

Reason for using Carmarthen town centre more often

Reasons	No.	% of respondents
Nicer or better town/environment	9	22.5
Better shopping facilities	8	20.0
Dissatisfied with Llanelli	5	12.5
Day out/change	4	10.0
More time now	3	7.5
Dissatisfied with Swansea	2	5.0
Improved/good public transport	1	2.5
Other	8	1.9
Total	40	100

Source: 1997 Residents' survey

Table 8.19

Reason for using Carmarthen town centre less often

Reasons	No.	% of respondents
Reduced mobility due to age/health	15	34.1
Inconvenience (travel time/cost/distance)	7	15.9
Moved further away	3	6.8
No longer work there	3	6.8
Lost access to car	2	4.5
Less income	1	2.3
Less time	1	2.3
Dissatisfaction with Carmarthen	1	2.3
Other	11	25.0
Total	44	100

Source: 1997 Residents' survey

Those residents who gave reasons for using Carmarthen town centre more thought it was primarily because the environment was better (9 or 22.5%) or the shopping facilities were better (8 or 20.0%). Only a small number of residents 5 (12.5%) used Carmarthen more because they were dissatisfied with Llanelli town centre. Carmarthen town centre was mainly used less often because of the reduced mobility of the residents (15 or 34.1%), or inconvenience (7 or 15.9%). There was no evidence of any impact of the environmental improvements in Llanelli town centre on changing shopping behaviour.

Variation in the types of residents using Carmarthen more or less

As for Swansea, cross-tabulations were run in order to explore whether there were any variations between the types of residents who used Carmarthen town centre most frequently, or those who used the town centres more often than they used to for shopping.

The application of the Pearson Chi-Square test identified only one significant relationship at the 95% confidence level (Table 8.20).

Table 8.20

Residents' changing use of Carmarthen town centre

Car ownership	n	Changing use % of respondents		
		More often	Less often	Same
Own car	181	22.1	23.2	54.7
No car	35	8.6	51.4	40.0
Total	216	19.9	27.8	52.3

Above 95% confidence level

Chi-Square 12.318 df2 Significance 0.002

1997 Residents' survey

A higher proportion of residents without a car used Carmarthen town centre less often than they used to, compared with those who owned cars. 18 (51.4%) residents without a car used the town centre less often compared with 42 (23.2%) who owned one. The less mobile residents used Carmarthen less than they used to. This was similar to the pattern identified for Swansea earlier in the chapter.

Overview regarding the competitive position of Llanelli relative to Carmarthen

Despite its improvement, Llanelli town centre may have declined relative to Carmarthen. Whilst Llanelli was well placed to compete with Carmarthen in terms of its accessibility, it did not compete well in terms of its shopping facilities or its shopping environment. The public investment in environmental improvements, without new attractions, was insufficient to significantly enhance its competitive position.

Variation in the socio-economic characteristics of the residents using competitor town centre and out of town locations

So far the evidence suggests that there are two town centres that mainly compete with Llanelli town centre, the strongest competitor being Swansea town centre, with Carmarthen town centre competing to a much lesser degree. However, the literature also refers to evidence that town centres not only compete amongst themselves but are also in competition with out of town retail developments (Baldock 1989; Bromley and Thomas 1993c; Fuller Peiser 1997; Howard and Davies 1993; Schiller 1994; Thomas and Bromley 1995; Williams 1991). The literature also identifies variations between the characteristics of the residents who shop in town centres, and those who shop out of town (Bromley and Thomas 1993c; DOE 1992; Howard and Davies 1993; Thomas and Bromley 1995; Westlake 1993). The residents' survey was, therefore, analysed to establish the extent to which out of town shopping locations competed with Llanelli town centre, and whether the socio-economic characteristics, and the location, of the residents using the competing town centre and the out of town locations varied significantly.

Chapter 5 identified the locations where the residents mainly shopped for groceries, clothes, furniture, electrical and DIY shopping (Tables 5.10-5.14). Whilst Swansea competed with Llanelli town centre as a main shopping location for clothes (92 or 31.3%), and furniture shopping (52 or 22.6%), Trostre Park competed with Llanelli as a main shopping location for groceries (178 or 60.1%), DIY (170 or 70.2%), and electrical goods (90 or 31.9%). Trostre Park was the main out of town retail location that competed with Llanelli town centre and its impact in diverting custom from the town centre was especially significant for grocery and DIY shopping.

The residents' survey also showed that there was variation (Appendix 5), in some cases significant (Tables 8.21-8.28), between the socio-economic characteristics of the residents who shopped in the competing town centres of Swansea and Carmarthen and the out of town Trostre Park. The variation mainly involved differences due to the age of the residents, or whether they owned a car, but other factors were also identified.

Table 8.21

Age composition of households mainly shopping for clothes in specified locations

Locations	n	Age composition % of respondents			
		Adult(s) + child(ren) under 16	All aged 16-59	Mix of under 60 and over 60+	All 60+
Llanelli town centre	156	19.2	25.6	7.7	47.4
Swansea	86	15.1	41.9	10.5	32.6
Total	242	17.8	31.4	8.7	42.1

Above 95% confidence level

Chi-Square 8.575 df3 Significance 0.036

Source: 1997 Residents' survey

Table 8.22

Age composition of households mainly shopping for electrical goods in specified locations

Locations	n	Age composition % of respondents			
		Adult(s) + child(ren) under 16	All aged 16-59	Mix of under 60 and over 60+	All 60+
Llanelli town centre	123	18.7	20.3	10.6	50.4
Swansea	23	21.7	47.8	8.7	21.7
Trostre Park	84	15.5	40.5	8.3	35.7
Total	230	17.8	30.4	9.6	42.2

Above 95% confidence level

Chi-Square 15.076 df6 Significance 0.020

Source: 1997 Residents' survey

Table 8.23

Age of principal shoppers mainly shopping for furniture in specified locations

Location	n	Age % of respondents			
		Under 30	30-44	45-59	60+
Llanelli town centre	65	6.2	13.8	29.2	50.8
Swansea	52	19.2	28.8	30.8	21.2
Trostre Park	29	17.2	24.1	24.1	34.5
Total	146	13.0	21.2	28.8	37.0

Above 95% confidence level

Chi-Square 14.703 df6 Significance 0.023

Source: 1997 Residents' survey

Table 8.24

Age of principal shoppers mainly shopping for electrical goods in specified locations

Location	n	Age % of respondents			
		Under 30	30-44	45-59	60+
Llanelli town centre	125	8.0	20.0	20.8	51.2
Swansea	27	14.8	25.9	33.3	25.9
Trostre Park	90	12.2	15.6	38.9	33.3
Total	242	10.3	19.0	28.9	41.7

Above 95% confidence level

Chi-Square 14.749 df6 Significance 0.022

Source: 1997 Residents' survey

Table 8.25

Employment status of households mainly shopping for electrical goods in specified locations

Location	n	Employment status % of respondents		
		Household with 1+ adult in work	Household with no adult in work	Retired/ other
Llanelli town centre	122	40.2	8.2	51.6
Swansea	23	73.9	0	26.1
Trostre Park	87	60.9	4.6	34.5
Total	232	51.3	6.0	42.7

Above 95% confidence level

Chi-Square 14.592 df4 Significance 0.006

Source: 1997 Residents' survey

Table 8.26

Social class of chief earner of households mainly shopping for electrical goods in specified locations

Location	n	Social class % of respondents			
		Social class 1-2	Social class3-5	Retired	Unemployed/ housewives/ students
Llanelli town centre	119	17.6	24.4	47.1	10.9
Swansea	23	43.5	39.1	17.4	0
Trostre Park	83	21.7	38.6	34.9	4.8
Total	225	21.8	31.1	39.6	7.6

Above 95% confidence level

Chi-Square 18.943 df6 Significance 0.004

Source: 1997 Residents' survey

Firstly, the proportion of elderly residents who mainly shopped for clothes in Llanelli town centre was higher than the proportion of elderly residents who mainly shopped at Swansea for clothes (Table 8.21). For example, nearly half of those who mainly shopped in Llanelli town centre were from households aged 60+ (47.4%). For those going to Swansea, only a third (32.6%) were from these older households. A similar pattern was identified comparing Llanelli town centre with Swansea and Trostre Park for electrical and furniture shopping (Tables 8.22 - 8.26).

Table 8.27

Car ownership of households mainly shopping for clothes in specified locations

Locations	n	Car ownership % of respondents	
		Own car	No car
Llanelli town centre	160	74.4	25.6
Swansea	90	93.3	6.7
Total	250	81.2	18.8

Above 95% confidence level

Chi-Square 13.562 df1 Significance 0.000

Source: 1997 Residents' survey

Table 8.28

Car ownership of households mainly shopping for furniture in specified locations

Locations	n	Car ownership % of respondents	
		Own car	No car
Llanelli town centre	66	86.4	13.6
Swansea	50	100.0	0
Trostre park	27	70.4	29.6
Total	143	88.1	11.9

Above 95% confidence level

Chi-Square 15.052 df2 Significance 0.001

Source: 1997 Residents' survey

Secondly, among residents who mainly shopped in Llanelli town centre for clothes and furniture a lower proportion owned a car compared with those residents who mainly shopped in Swansea (Tables 8.27 – 8.28). For example, 119 residents (74.4%) who mainly shopped in Llanelli town centre for clothes owned a car, whereas 84 (93.3%) of residents who mainly shopped in Swansea for clothes owned a car. There was a different picture for those who mainly shopped for furniture at Trostre Park. For those residents proportionately fewer (70.4%) owned a car.

Table 8.29

Location of households mainly shopping for electrical goods in specified locations

Location	n	Location of residents % of respondents		
		Burry Port	Llanelli	Llangennech
Llanelli town centre	127	33.9	40.9	25.2
Swansea	27	25.9	22.2	51.9
Trostre Park	90	17.8	50.0	32.2
Total	244	27.0	42.2	30.7

Above 95% confidence level

Chi-Square 14.196 df4 Significance 0.007

Source: 1997 Residents' survey

Finally, there was evidence that showed that location of residence affected the choice of shopping location for electrical goods (Table 8.29). For example, among those who mainly shopped in Llanelli town centre for electrical goods the largest proportion also lived close to the town centre.

Studies in Swansea also found that car ownership and age were factors that affected shopping behaviour and that "the attractions of the newer off-centre shopping opportunities [had] an extremely strong appeal for the more mobile section of the shopping population" (Bromley and Thomas 1993c: 235). There was a similar finding in the small town of Ystalyfera where the principal grocery shoppers were "disproportionately drawn from the carless, the elderly and from households without anyone in employment" (Bromley and Thomas 1995: 453). The popularity of Llanelli town centre with the older or less mobile residents might imply some of them are constrained to use the centre, but it also shows the value of a town that caters for residents with a wide range of socio-economic characteristics. Llanelli town centre, therefore, exhibits several of the hallmarks of sustainable development, including an improved environment and the inclusion of a broad range of social groups that are able to benefit from the town as a shopping destination. Notwithstanding these environmental and social benefits, if the expenditure levels of the elderly are less than the younger age groups, then this might adversely affect trade in the town, and its ability to maintain its commercial viability.

Conclusions

This chapter has looked at Llanelli and its competitors, its changing competitive position, and variations in the socio-economic characteristics of residents using Llanelli compared with competitor locations. It has also explored the extent to which changes in Llanelli's competitive position might have been affected by the public investment in the environment of the town. The analysis confirms that in 1997 Carmarthen and, to a greater extent, Swansea were the main town centres competing with Llanelli town centre. Trostre Park was the main out of town competitor location.

The residents and the traders claimed that Llanelli town centre had declined relative to Carmarthen and Swansea in the years prior to 1997. This was mainly because they thought that the shopping facilities were better in both of the towns, and the environment better in Carmarthen. The residents claimed they did not use Carmarthen or Swansea less because of the improvements to Llanelli town centre. The change in use was most often explained by personal mobility factors rather than the changing characteristics of the shopping centres. There was no evidence of a positive impact of the environmental improvements on the competitive position of Llanelli relative to Carmarthen and Swansea.

Despite this, Llanelli remained a popular shopping location for a wide range of socio-economic groups, including the elderly and the car-less, some of whom were unable, or preferred not to, travel to competing locations such as Carmarthen, Swansea, and Trostre Park. However, further environmental improvements and new attractions are required to safeguard Llanelli town centre's vitality and viability, and its valuable role as a shopping destination for the wider community.

The large scale residents' and trader surveys, pedestrian counts and other published information have so far provided the data for the exploration of the impact of environmental improvements on the regeneration of Llanelli town centre. The next chapter adds a richer qualitative dimension to the exploration drawing on a number of interviews with key informants with a good knowledge of the town centre.

Chapter 9

Key informants' perspectives on Llanelli town centre

Introduction

The previous chapters, 5-8, have explored the impact of public investment on Llanelli town centre drawing mainly on the large scale residents' and trader surveys that provided vital information on shopping behaviour and trading patterns as well as on attitudes to changes in the town centre. In order to clarify the interpretation of the impact of public investment on the town centre, and to provide further insight in relation to the impact of environmental improvements on the town centre nine key informants were interviewed in 1998 after the St Elli shopping centre had opened. The interviews were a component of the multi-method research design (Brannen 1992; Burgess 1982, 1991; Patton 1990; Philip 1998), elaborated in chapter 4. The key informants were asked what they thought of the main findings of the trader survey, and were also posed several open questions. All the key informants had a good knowledge of the town and were either involved in facilitating changes to the centre or with trading organisations, or they traded in the town. Firstly, they included persons from the two main public sector organisations and the professional advisors that facilitated change in the town. The public sector organisations were the local authority and the Welsh Development Agency (WDA). The professional advisors were Gordon Lewis Associates (planning), Chesterton Consulting and DTZ Debenham Thorpe (surveying/estate agency). Secondly, they included persons from the two main trading organisations, and the retail managers, whose members or operations were affected by the changes. The trading organisations were Llanelli Chamber of Trade and Commerce, and Llanelli Trading Committee. The managers ran the Llanelli market, Marks and Spencer, and Woolworths. A profile of the key informants, the main findings and open questions which formed the subject of the interviews, and a summary of the responses, are set out in Appendix 6.

As previously discussed, the improvement of the environment of Llanelli town centre was one facet of a revitalisation programme facilitated by the public sector in the 1990s.

This chapter utilises mainly the views of the key informants to explore further the perceived impact of those improvements on the commercial health of the town centre.

The changing health and competitive status of the town centre 1992 – 1997

The key informants were able to suggest reasons to explain the trader survey finding that the town centre trade may have been in overall decline 1992-97 and that its trade may have also declined relative to Cardiff, Carmarthen, Neath and Swansea. These reasons included the decline in the economy in the early 1990s, disruption due to works in the town, inadequate car parking and competition from other centres with a greater variety of shops, especially Carmarthen and Swansea as well as out of town locations. The key informants' views on the impact of disruption are discussed later in this chapter. It is interesting to note in relation to car parking that whilst most key informants thought car parking in Llanelli was inadequate, the shop managers (Tony Riddout and Kieran Roper) disagreed because they considered it was more convenient and cheaper than in Swansea. There were also views on the main focus of out of town retail competition. Trostre Park was highlighted as a main competitor to the town centre because of its convenience, and its Sunday trading policy. The manager of Woolworths and chairman of Llanelli Trading Committee (Tony Riddout) also thought the Swansea Enterprise Park was a strong competitor, especially since the opening of the new A484 link road from Llanelli to Swansea. Others agree that the context for changes in Llanelli is "considerable competition from the newer retail forms" (Thomas and Bromley 2002).

The value of environmental improvements 1992-97

Without exception, the key informants thought that the environmental improvements were a worthwhile investment. Several reasons were mentioned. The amenity of the town had been improved; it was more pleasant to walk through. The appearance of the town was better and more up to date. For example, the 'ugly' 1960s canopies had been replaced by others regarded as more attractive and functionally beneficial, providing shelter in inclement weather. The improvements inspired a confidence that the town was changing for the better, and helped create an incentive for investment by retailers and developers, including Redrow. They also helped to unite the old town centre of Stepney

Street and Vaughan Street with the new shopping centre. This helped draw shoppers from the new shopping centre into the former prime area, which otherwise might have become a 'dead' area of town. As will be discussed later, the key informants acknowledged there was disruption during the construction of the public realm works, but the fact that the improvements following their completion were thought to be worthwhile, suggests that there were perceived long term benefits which outweighed the adverse impact of disruption. This point was put succinctly by the manager of Woolworths and chairman of Llanelli Trading Committee (Tony Riddout) in answer to the question of whether the improvements were a worthwhile investment:

> "Absolutely, one hundred percent. I think they have done a pretty good job. There was a lot of pain, but again, I think the gain has been worthwhile". (Interview, July 1998).

The impact of disruption on trade 1992-97

None of the key informants was surprised with the trader survey finding that the traders most frequently cited the disruption of changes to the town centre as being a factor least beneficial to the businesses 1992-1997. They accepted the adverse affects from the disruption were significant. The President of Llanelli Chamber of Trade and Commerce (Paul Oram) said:

> "The overwhelming opinion of our members (which is reflected in the number of appeals for rate reduction) indicated the laying of services and resurfacing of the pedestrian areas was a very negative force on their businesses. In fact the changes had left a negative impression on the perceptions of their customers. A lot of people were now not prepared to put up with the works to the infrastructure during its construction" (Interview, April 1998).

It is worth noting, however, that the problems associated with disruption are not unique to Llanelli and are a common complaint in other UK town centres the subject of physical change (DOE 1997a; Lockwood 1997b).

The majority of the Llanelli key informants believed the adverse impact was short lived. The President of Llanelli Chamber of Trade and Commerce (Paul Oram) thought some businesses did close or relocate but that was due to a natural process in the business life cycle where customers went elsewhere such as Trostre Park, or a local owner retired and there was no one in the family willing to take the business on. The manager of Woolworths and chairman of Llanelli Trading Committee (Tony Riddout) thought the changes were drawn out far too long, probably partly due to indecision by the local planning authority.

The completion of the shopping centre, and the consequent improved vitality in the town, was probably the turning point that helped the traders forget the difficulties they had experienced because of the disruption. A WDA manager (Huw Thomas) and an associate director of Chesterton (Keith Thomas) both supported this proposition. The WDA manager thought that the effects, in the majority of cases, would be short lived because the shopping centre had produced additional trade. This had had a greater impact than if it had just been an environmental improvement, which would have taken longer to affect trade. The associate director of Chesterton thought the difficulties would be viewed as short term, as long as the benefits were visible at the outset. He thought people would see it as worthwhile now that there were some new traders coming into the new St Elli shopping centre. In the case of Llanelli, therefore, the completion of the St Elli shopping centre, and the noticeable increase in vitality and trade associated with its development, probably helped reinforce the majority key informant view that the adverse effects of disruption were short lived.

The impact of environmental improvements on trade 1992-97

They key informants agreed with the findings of the trader survey that the central parts of the town had traded relatively well 1992-97, and that the peripheral parts of the town were probably in decline. However, in 1997, several key informants challenged the trader survey finding that a majority of traders thought that the works to the multi-storey car park, Stepney Street, and Vaughan Street made no difference to their turnover. A local authority officer (Susan Moore) was surprised with the finding, and thought that perhaps it was because people were coming to town but not spending money, or that there had been insufficient time to encourage people back. The consultant surveyors (Peter Kelly and Keith Thomas) thought the trading position might have been worse without the works. Despite these more optimistic views, it was probable that, by 1998, the improvements had not brought about a rapid or easily measurable transformation of trading performance in the town centre. This proposition was consistent with the opinion of the manager of Woolworths and chairman of Llanelli Trading Committee (Tony Riddout), who did not think that there had been a big difference in turnover as a result of the works. There was, however, some suggestion that the environmental improvements may have assisted trading by 1998. The President of Llanelli Chamber of Trade and Commerce (Paul Oram) said:

> "A significant number of Chamber members did, in fact, report that the improvements such as the canopies and the bath stone laid as flooring to Stepney Street and Vaughan Street had helped their turnovers to increase." (Interview, April 1998).

Several key informants also thought that the improvements would lead to a positive impact on trading. Reasons mentioned included the prospect of keeping people longer in towns so that they were more likely to spend in the shops, and a more pleasant experience assisting with the promotion of the town, influencing retailer attitudes. This suggests that in Llanelli there may have been a time lag between the implementation of the changes to the town centre and subsequent improved trading. A time lag in relation to trading benefits has also been identified for pedestrianisation schemes (Has-Klau 1993), and the US Main Streets programme where a study found that "job and business growth" took place "largely between the fourth and eight years" (DOE 1997a: 27).

Several key informants also challenged the trader survey finding that traders most frequently cited better management and product range, not environmental improvement, as reasons for turnover increase 1992-1997. A consultant surveyor (Keith Thomas) thought that in a competitive context a quality environment was needed to attract shoppers to town. Other key informants held similar views. The planning consultant (Gordon Lewis) thought location, and the surrounding environment was clearly important. The manager of Llanelli Market (Jeff Derek) believed the modern shopper wants a nice environment for shopping. The manager of Woolworths and chairman of Llanelli Trading Committee (Tony Riddout) thought that any business increases had probably come about because of the environment of the town.

The key informants also agreed that the majority of turnover increases 1992 – 1997 were among traders in the larger units (2500 sq ft and over) and those in the prime shopping area. They thought this because the prime area contained the larger shops such as Marks and Spencer, Boots and Woolworths and other national multiples, that would continue to attract most shoppers.

The impact of environmental improvements on employment 1992-97

There was also no surprise, amongst the key informants, that more traders reported employment decreases than increases for the town centre as a whole 1992 – 1997. The reasons they mentioned included the general economic climate, reductions in turnover, and efficiencies or better management in retailing. However, one of the key informants, the manager of Woolworths and chairman of Llanelli Trading Committee (Tony Riddout), thought the change in employment was more likely a result of better management than decrease in trade. There was also no surprise that a higher proportion of traders in improved areas reported employment increases than in the unimproved areas. The most commonly mentioned reason for this was the assumed link between employment increases and higher turnover, or more business, in the improved area. The President of Llanelli Chamber of Trade and Commerce (Paul Oram) also thought there were more vacancies and higher turnover of businesses in the unimproved areas; and that new business start ups in those areas would keep overheads such as staff to a minimum.

The impact of environmental improvements on investment 1992-97

Key informant reaction varied to the trader survey finding that most traders thought the changes to the town had not affected their investment decisions. Several reasons were given to help explain the finding. National stores have strategies for upgrade based on turnover and profitability rather than what is going on outside their stores. Local traders probably would wait to see greater signs of improvement in the town before deciding to invest. Traders with reduced turnover might have looked to cut costs rather than invest.

On the other hand, a local authority officer (Susan Moore) and a WDA manager (Huw Thomas), both involved with public sector organisations that promoted change in the town, were surprised with the finding. They thought that the changes in the town centre would have encouraged businesses to invest. The WDA manager (Huw Thomas) thought that the investment made by Marks and Spencer and Woolworths had to be linked with the wider environment. The manager of Llanelli Market (Jeff Derek) and a shop manager (Kieran Roper) also cited Woolworths as an example of a store that had invested because of the improvements to the town centre, and a reaction to ASDA opening. The manager of Woolworths and chairman of Llanelli Trading Committee (Tony Riddout) thought the fact that some of the larger stores, such as Woolworths, did invest might help explain why some stores performed better than others did.

The previously reported interviews with Redrow and Sun Life confirmed that the environmental improvements had played a role in encouraging the development of the St Elli shopping centre. However, other factors were more significant, such as the creation of a viable site, improved car parking, and the business opportunity presented by the scheme. The key informants also thought that the primary reason that Redrow had invested in the town centre was because of the business opportunity and profitability of the scheme, as well as the work of the local authority in obtaining planning consent and assembling the land for the scheme. However, a consultant surveyor (Peter Kelly) also thought that the environmental improvements may have played a role in helping attract the new shopping centre development. His view was that:

> "You probably would not have attracted the new shopping centre unless some of the environmental, highway and other improvements had been carried out first." (Interview, May 1998).

The impact of environmental improvements on the use of the town 1992-97

Most of the key informants agreed that there was a decreased use of the town as a whole by shoppers 1992-1997, although an associate director of Chesterton (Keith Thomas) thought the town was well used (in 1998), with the central area appearing to be trading very strongly with few vacancies. They thought that any decreases were due to shop demolitions and disruption resulting from the prolonged period of redevelopment in the town centre; and availability of alternative options for shopping at Carmarthen, Swansea, and Trostre Park. On the other hand, there was some suggestion that improvements to vitality may have been underway by 1998. The manager of Woolworths and chairman of Llanelli Trading Committee (Tony Riddout) thought that there was a recovery of use of parts of the town by shoppers in the latter part of 1992-1997, and that this was because of the environmental changes.

Two key informants provided responses that suggest the environmental improvements may have encouraged increased use of the town centre for social as well as for shopping use. In response to the trader survey finding that the majority of traders did not think that the works had affected turnover, a local authority officer (Susan Moore) thought this may have been because people were coming to town but not spending money. The President of Llanelli Chamber of Trade and Commerce (Paul Oram) thought that more individuals were now coming to the town centre for social reasons rather than to purchase goods partly because of the more pleasant environment which people would find more conducive to relax and spend time in, and partly because of economic circumstances. He thought a reduction in the levels of disposal income in the town, had affected what people spend their money on, and said:

> "You get a lot of trade for example in the small cafes, but you don't necessarily get the people spending a lot of cash on furniture and non consumable products." (Interview, April 1998).

The adverse effect of a poor environment on social interaction in town centres is a symptom of decline that has been recognised in other UK town centres (DTEDC 1988).

The possible increased social use of Llanelli town centre because of the improvements is, therefore, a sign of regeneration.

The impact of the environmental improvements 1992-97 compared with that of the new shopping centre

As a means of exploring the impact of environmental improvements compared with new attractions on Llanelli town centre the key informants were posed questions, in 1998, about the St Elli shopping centre, which was opened in November 1997. One of the findings of the trader survey was that the vast majority of traders in the town thought that the new shopping centre would be beneficial, although a minority were concerned that their businesses would suffer because of competition. Concern regarding the adverse impact of new shopping development on existing businesses in town centres in the UK has been identified elsewhere (Guy 1994; Montgomery 1990; Carley *et al.* 2001).

Most of the key informants, who were interviewed after the St Elli shopping centre was opened, thought that the new shopping centre was more beneficial than the environmental improvements because it was more effective in drawing new shoppers to the town. Several reasons were given to support this view. The new shopping centre had the critical mass, scale, and variety of retailing capacity. The new foodstore and covered shopping mall added a completely new dimension to the town. It was a 'flagship' project that raised the profile of the town. The environmental improvements were thought to be of value and complementary, but not so effective in drawing people to the town. The manager of Woolworths and chairman of Llanelli Trading Committee (Tony Riddout), expressed the point well:

> "It is the new shopping centre that is going to have the biggest effect. The environmental changes are just going to make it a much more pleasant shopping experience; which hopefully will hold the people in the town when they get there, and they will come back because it is nice. But ultimately the new centre is the draw; without that they would not be there in the first place" (Interview, July 1998).

The spatial impact of the environmental improvements 1992-97

The analysis of the trader survey showed that the environmental changes provided minor benefits to businesses in the improved areas. However, most of the traders in the secondary and peripheral areas did not believe they had benefited from the central area improvements. The environmental improvements, therefore, appeared to have had a localised impact. The key informants provided further evidence to substantiate this view. A local authority officer (Susan Moore) thought that the traders in secondary areas, especially Cowell Street, had felt left out. The traders in the unimproved part of Cowell Street were "cheesed off" because it was looking bad compared to the improved part of the street. They thought that new improvements would draw people down the street and join them into the rest of the town. A consultant planner (Gordon Lewis) made the point that the peripheral areas such as Park Street and Upper Park Street had been neglected by the redevelopment scheme. The policy of improving only the central parts of Llanelli may, therefore, have provided little assistance to traders located in the naturally disadvantaged peripheral areas. There may not have been spin-off benefits for the wider town.

An extension of the environmental programme to the peripheral areas might encourage the traders to feel more involved in the revitalisation programme. It would not, however, necessarily be the catalyst that would reverse decline in those areas. The influence of environmental improvements on trading patterns may be far less significant than other factors, such as location. As a consultant surveyor (Peter Kelly) put it:

> "If trade is declining the tertiary areas will suffer. It would not be the environmental improvements that would cause what trade is left to gravitate to the centre, it would be the town centre itself." (Interview, May 1998).

If this is true, then it follows that improvements in the peripheral areas may not be sufficient to counter-act the natural draw of the more central areas. A change in the role of those areas may be required. As previously discussed, the retail decline of peripheral areas in a process known as "compaction", is common to many UK town centres (Williams 1991: 37).

The traders in the peripheral areas may also need to adopt a more modern retailing approach. As the manager of Woolworths and chairman of Llanelli Trading Committee (Tony Riddout) commented:

> "Cowell Street, I think, has gone backwards. The reason they have gone backwards is that the traders in Cowell Street do not appear to be bringing themselves into the 20th Century in terms of opening hours, or whatever. There is still a reluctance to open on a Tuesday for example, which the rest of the town has done now for some years. Cowell Street will close on a Tuesday, and I think customers do not use it for that reason" (Interview, July 1998).

Managing change

The potentially positive role of town centre management is well documented (DOE 1994; DOE 1997a; DETR 1996; Medway *et al.* 1998; Oc and Tiesdale 1997a). In the case of Llanelli, whilst the key informants thought the environmental improvements were worthwhile, and the new St Elli shopping centre had enhanced the vitality and viability of the town centre, the process of managing change in the town gave rise to some adverse comments.

None of the key informants was surprised with the trader survey finding that a majority of traders (excluding don't knows and no views) were dissatisfied or very dissatisfied with town centre management. Communication within the town, and town centre management, were mentioned as matters requiring attention. A consultant planner (Gordon Lewis) also referred to town centre management as a means of removing conflicts between the local authority and traders, and getting every one to work together. This would seem to be particularly relevant in Llanelli where the town has been subject to extensive and prolonged change, and where a substantial element of the trader community is struggling to maintain its business activity. It is perhaps not surprising, therefore, that the key informants reported that negative views on the changes in the town were most common amongst local traders whose businesses were trading under difficult circumstances. In contrast, they thought the national traders, who were probably performing better, had a longer term and more positive outlook. A more positive attitude by national, compared with local, stores was also noted by Hass-Klau (1993) in terms of the impact of pedestrianisation schemes (Hass-Klau 1993: 21). Whilst better communication through an enhanced town centre management framework might encourage a more widespread positive outlook throughout the trader community, and improve the dissemination of best retailer practice, special attention also needs to be given to help local businesses, especially those located outside the improved central areas.

The future

The key informants thought that future action was required to revitalise the town. The main priorities identified by the key informants were improving the remaining rundown peripheral areas and the indoor market, enhancing town centre management (including security, and general communication), and properly selling the virtues of the town centre in its wider context. To achieve this there will be a need for further public and private sector investment and promotion, and an enhanced town centre management framework aimed at securing a more inclusive dimension to future change.

The different views of the key informants

Whilst some of the views of the key informants differed in detail or emphasis, there was a strong consensus that the environmental improvements in Llanelli town centre had been a worthwhile investment, and also that they did, or potentially would, enhance trade. There was also a strong consensus that the impact of the new St Elli shopping centre on trade was far more significant, and of the two changes in the town, the new shopping centre was more beneficial. There was a common view point from the facilitators of change in the town (Susan Moore, Huw Thomas), the consultants (Peter Kelly, Keith Thomas, Gordan Lewis) the traders (Kieren Roper, Tony Riddout), and those with a close working relationship with the traders (Paul Oram, Jeff Derek, Tony Riddout). The fact that there was a strong consensus of opinion on these issues suggests that there was probably not a significant bias from the different types of key informant.

Comparison of trader and key informant views

The key informants agreed with the majority trader survey view that the St Elli shopping centre was likely to be more beneficial than the environmental improvements. However, whilst the key informants thought that the environmental improvements were a worthwhile investment, most of the traders did not think that they were a factor that increased turnover in the town centre. Even in the improved areas most of the traders thought the improvements were of minor, rather than significant, benefit to their businesses. It appears, therefore, that in Llanelli the key informants' perception of the value of environmental improvements, or their role in influencing trade, was greater than the perception of the traders, and more in line with experience elsewhere in the U.K. For example, research by the Department of the Environment /Association of Town Centre Management found that:

> "Urban space schemes, which are part of a wider package of proposals, can have a measurable impact on trading performance. Analysis of pedestrian flow counts, business surveys, or car park usage data indicates that trading performance can, typically, be improved by up to 15%, although greater influences can be achieved within targeted secondary or rundown areas" (DOE/ATCM 1997).

In Llanelli, the increases in turnover within the improved areas were consistent with this finding. The difference was that whereas the key informants were happy to attribute the increases, in part at least, to the improvements, the traders were less inclined to do so. What could account for these apparently different perspectives? One possibility is that the local traders, the majority of the traders surveyed, were more "sceptical" than the key informants (Hass-Klau 1993). Furthermore, any such differences in opinion may also have been heightened by the disruption of the works that may have created frustrations in the trader community. The local traders may, therefore, have undervalued the benefits of the environmental improvements. It is also possible that the full benefits of the improvements may not have become evident at the time of the trader survey because of a time lag between the completion of the works, and changes to consumer behaviour. Alternatively, other factors such as the opening of the St Elli shopping centre were improving the trade of the town centre by the time of the interviews with the key informants.

Conclusions

The key informants agreed that the central parts of the town had traded relatively well 1992-97, and that the peripheral parts of the town were probably in decline. Without exception, they agreed that the environmental improvements were a worthwhile investment. They acknowledged there was disruption during the construction, but thought there were long term benefits that outweighed the adverse impact of the disruption. The key informants thought the environmental improvements were a factor that had, or would, assist trade in the town. There was some suggestion that such a process may have begun by 1998 with a claim that some traders had reported higher turnover, and the perception of increased use of parts of the town, possibly due to the improvements. Whilst it was acknowledged that the impact on trader investment was not great, several key informants cited some of the larger stores that they thought had invested because of the improvements. One key informant also thought the shopping centre investment by Redrow was probably partly influenced by the environmental improvements. Two key informants provided responses that suggested the improvements, coupled with changes to the local economy, may have encouraged an increased use of the town for social purposes. There was a general consensus that, although the improvements were worthwhile, their likely impact was far less significant than the new St Elli shopping centre. The improvements also had a local impact and were concentrated in the more central parts of town. There was evidence that the traders in the more peripheral areas, for example parts of Cowell Street, felt left out of the revitalisation programme. The key informants thought the priorities for future action included improving the remaining run down areas, enhancing town centre management, and promoting the town more effectively.

The increases in turnover within the improved central parts of Llanelli town centre was consistent with experience elsewhere in the UK, but whereas the key informants were happy to attribute the increases, in part at least, to the improvements, the traders were less inclined to do so.

The public investment 1992-97 has played an essential part in laying the foundations for the revitalisation of Llanelli town centre. Compared with the new St Elli shopping centre, the commercial impact of the environmental improvements was thought to be less dramatic and longer term. Nevertheless, the key informants thought that the environmental improvements were a worthwhile investment which helped improve the amenity of the town, and improved the prospects for better trading in the town in the future.

This chapter has utilised the views of key informants to add a qualitative dimension to the exploration of the impact of environmental improvements in Llanelli town centre. The next chapter draws mainly on time series GOAD plan analysis to provide further insight of the impact of the changes in the town centre on retailer representation and vacancy rates, as indicators of the town's commercial health.

Chapter 10
Llanelli retailing change

Introduction

The previous chapters presented evidence that showed that though the improvements to the environment of Llanelli town centre were welcomed as worthwhile investments, they probably did not greatly affect trade in the town or its competitive status during the period 1992-97. Using data from GOAD plans and GOAD summary reports this chapter explores the pattern of retail change in the town over the period 1982-99 in order to provide further insight into the impact of the environmental improvements. The exploration focuses mainly on changes in retailer representation and vacancy rates because these are important indicators of the health of a town centre, and because comparable time series data are available.

GOAD plans and summary reports

Experian Goad Ltd provides GOAD plans and summary reports for over 1100 UK centres, which are regularly surveyed. The plans, which have been available since 1966 (Rowley 1988) include details of the location and name of retail units. The summary reports provide a useful range of summary statistics that complement the plans. Of particular value, is a summary of the number and floorspace area, together with percentage figures, of the retail units in a shopping centre by category: convenience, comparison, service, other, and vacant and under construction. There is also a useful indexing system that allows a comparison of number and area percentage figures for a shopping centre with the UK average percentage. The plans and summary reports for Llanelli are surveyed at roughly two year intervals, and therefore provide a valuable source of time-series data that is utilised in this chapter.

Convenience retailing change

The number and floorspace area of outlets used for convenience retailing in Llanelli town centre reduced from 38 (87k sq ft) in 1982 to 28 (34k sq ft) in 1992 (Tables 10.1-10.2). The closure of Tesco in 1989 significantly contributed to the drop in floorspace used for convenience shopping during that period. The trend continued during the period 1992 to 1996 when the main changes to the town centre's environment took place. There were 10 fewer convenience outlets trading in 1996 (18) than in 1992 (28). Convenience floorspace reduced by 8 k sq ft, from 34 k sq ft in 1992 to 26 k sq ft in 1996. This suggests that the environmental changes to the town centre did not materially impact on the trend of a reducing range of convenience goods provision. It is worth noting, however, that the loss of small shops is not unique to Llanelli, but is in line with national trends that have been well documented (Carley *et al.* 2001; Montgomery 1990; Thomas and Bromley 1995; Wrigley 1988). In fact, the situation in Llanelli prior to 1997 fits closely to a pattern identified by Montgomery (1990):

> "So we are already witnessing a decline in the numbers of smaller shops, especially in existing high streets and local centres. In the food sector, for instance, some towns are now virtually dominated by one or two large multiples operating from edge or out-of-town locations and, in some cases, having closed their in-centre supermarkets" (Montgomery 1990: 110).

The main convenience goods retailing change took place in November 1997 with the opening of the 64 sq ft ASDA store, the primary anchor to the new St Elli shopping centre. By June 1999 the floorspace devoted to convenience retailing in Llanelli town centre had risen to 106 k sq ft, trading in 21 outlets. The previous trend of a reduction, since 1982, in the number and floorspace area of convenience outlets was reversed after 1996. The St Elli shopping centre clearly had a key impact on the provision of convenience retailing.

Table 10.1

Number and percentage of outlets in Llanelli

Type of outlets	Number (%) of outlets				
	Nov. 1982	Oct. 1988	Sept. 1992	Dec. 1996	June. 1999
Convenience	38 (12.8)	31 (10.1)	28 (9.0)	18 (6.9)	21 (7.4)
Comparison	174 (58.6)	160 (52.3)	147 (47.2)	129 (49.4)	137 (48.1)
Service	59 (19.9)	70 (22.9)	84 (27.0)	70 (26.8)	71 (24.9)
Other	5 (1.7)	6 (2.0)	4 (1.2)	3 (1.1)	3 (1.1)
Sub-total, occupied outlets	276 (93.0)	267 (87.3)	263 (84.4)	220 (84.2)	232 (81.5)
Vacant & under construction	21 (7.1)	39 (12.8)	48 (15.4)	41 (15.7)	53 (18.6)
Total	297	306	311	261	285

Source: GOAD summary reports

Table 10.2

Floorspace area and percentage of outlets in Llanelli

Type of outlets	Area k sq. ft. gross (%) of outlets				
	Nov. 1982	Oct. 1988	Sept. 1992	Dec. 1996	1999
Convenience	87 (17.5)	79 (16.3)	34 (5.4)	26 (4.8)	106 (16.4)
Comparison	273 (54.9)	247 (50.6)	305 (49.6)	279 (51.3)	300 (46.3)
Service	85 (17.0)	108 (22.1)	156 (25.3)	128 (23.4)	128 (19.9)
Other	9 (1.9)	7 (1.5)	13 (2.0)	16 (2.8)	16 (2.4)
Sub-total, occupied outlets	454 (91.3)	441 (90.5)	508 (82.3)	449 (82.3)	550 (85.0)
Vacant & under construction	44 (8.8)	46 (9.4)	108 (17.5)	95 (17.4)	97 (15.1)
Total	497	489	615	543	647

Source: GOAD summary reports

Comparison retailing change

The number of outlets used for comparison retailing in Llanelli town centre reduced from 174 in 1982 to 147 in 1992 (Tables 10.1-10.2). The comparison goods floorspace decreased from 273 k sq ft in 1982 to 247 k sq ft in 1988 before rising to 305 k sq ft in 1992. There was a reduction in the number and floorspace of comparison retailing outlets during the period 1992 to 1996 when the main changes to the town centre's environment took place. There were 18 fewer comparison outlets trading in 1996 (129) than in 1992 (147). Comparison floorspace reduced by 26 k sq ft over the same period from 305 k sq ft in 1992 to 279 k sq ft in 1996. Although the number of comparison outlets fell during the period 1982-96 there was an improvement in the range of major comparison stores, mainly national multiples (see appendix 7). The number of major comparison stores increased significantly from 24 in 1982 to 31 in 1988 and rose slightly from 31 in 1992 to

32 in 1996, the period when the environmental improvements took place. Again, this finding fits the national trend that has involved an overall reduction in the number of shops but with a concentration of retail capital into larger stores (Carley *et al.* 2001; Wrigley 1988). Overall these data suggest that the environmental changes to the town centre did not impact greatly on comparison goods retailing provision. The main comparison goods retailing change took place following the opening of new St Elli shopping centre. The number of comparison outlets increased by 8 from 129 in 1996 to 137 in 1999; floorspace increased by 21 k sq ft from 279 k sq ft in 1996 to 300 k sq ft in 1999. The previous trend (since 1982) in the reduction of comparison outlets was reversed after 1996, and the floorspace area devoted to comparison retailing in 1999 was close to the earlier 1992 peak. Furthermore, the number of major comparison stores increased from 32 in 1996 to 42 in 1999, which was accounted for mainly by the attraction of 11 new occupied outlets in the St Elli shopping centre. Again this highlights the impact of the St Elli shopping centre on retail provision in the town.

Service retailing change

The number of service outlets increased by 25 from 59 in 1982 to 84 in 1992 (Tables 10.1-10.2). Over the same period floorspace increased by 81 k sq ft from 85 k sq ft to 156 k sq ft. Many comparison and convenience outlets were replaced by service businesses such as restaurants, "take-aways", banks, estate agents and travel agents, a common pattern in the UK that Montgomery (1990) associates with shopping centre decline (Montgomery 1990). While such changes show that the town was finding a new role for its vacant space they are not consistent with a town that was enhancing its competitive status. During the period 1992-96 when the town centre's environment was changed, the number of service outlets fell by 10 from 84 to 70; service floorspace dropped by 28 k sq ft from 156 k sq ft in 1992 to 128 k sq ft in 1996. Furthermore, as has been already established, there was not a growth in convenience or comparison floorspace 1992-96 to replace some of the lost service floorspace. The fall in the provision of service outlets 1992-96 was halted between 1996 and 1999 showing that the new St Elli shopping centre, which opened in 1997, may have had an impact on service retail provision.

Vacancy rates

The GOAD summary reports provide statistics for vacant units and units under construction as a single category. A visual check of the corresponding GOAD plans showed that there were no major schemes under construction for the years analysed in this chapter. The category is therefore assumed to include mainly vacant units, and for the remainder of this chapter the statistics will be referred to as dealing with vacant outlets.

The number of vacant outlets rose from 21 in 1982 to 39 in 1988 (Table 10.1). The rise in vacant floorspace over the same period was only 2 k sq ft, 44 k sq ft in 1982, 46 k sq ft in 1988, implying an increase in the proportion of vacancies in small units in 1988 compared with 1982 (Table 10.2). During the period 1988 to 1992 when the economy of the UK went through a "boom-bust" phase, the number of vacant units continued to rise from 39 in 1988 to 48 in 1992. There was also a sharp rise in vacant floorspace of 62 sq ft, from 46 k sq ft in 1988 to 108 k sq ft in 1992. A visual inspection of the GOAD plans for 1988 and 1992 suggests that the main increase in the number of vacancies was concentrated outside the prime area of Stepney Street and Vaughan Street (Prime area A) (Fig 6; Table 10.3). The main casualties were the smaller independent traders, located outside the prime area, who were probably less able to weather the storm of the 1991-92 recession than the major stores such as the multiples. Two areas were especially adversely affected by increased vacancies. Firstly, there was a large increase in vacancies in the northern section of Market Street and Upper Park Street. As well as being peripheral this area probably also suffered a decline in vitality following the closure of the nearby Tesco foodstore in 1989. Secondly, there were increases in the number of vacant outlets in Market Arcade, elsewhere in Market Street, and Murray Street. These streets were located within the area where the Council was assembling property for subsequent redevelopment. The Council would have been reluctant to re-let those properties when they became vacant to avoid prejudicing the redevelopment scheme, possibly resulting in vacancies that may have been higher in 1992 than they otherwise might have been.

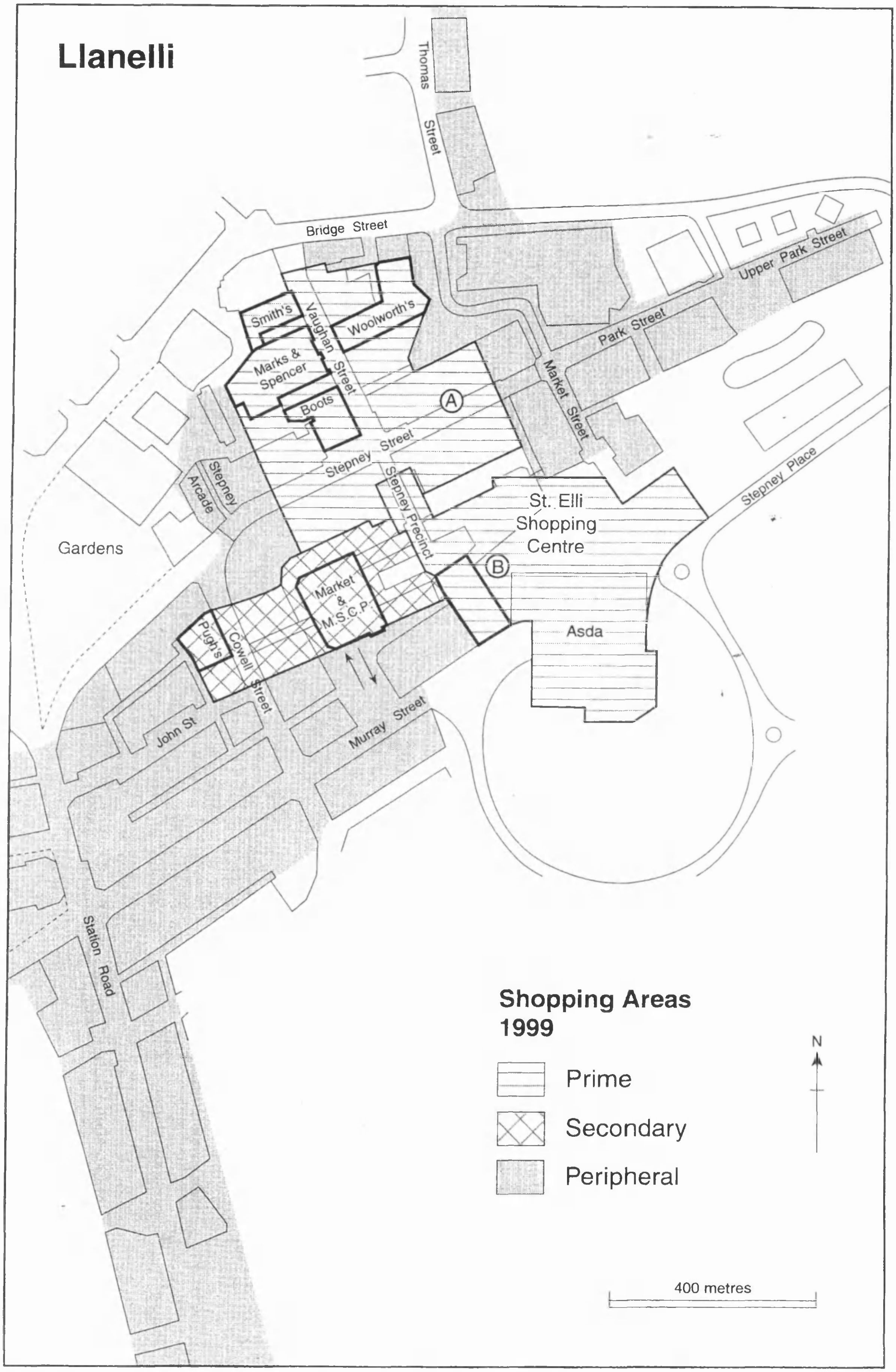

Fig 6: Prime, secondary and peripheral shopping areas 1999

Table 10.3

Number of vacant outlets in Llanelli

Location	Number of vacant outlets in Llanelli				
	1982	1988	1992	1996	1999
Prime area A (Vaughan Street and Stepney Street)					
Stepney Street	0	2	2	1	2
Vaughan Street	0	1	1	1	1
Sub-total	0	3	3	2	3
Prime area B (St Elli shopping centre)					6
Sub-total					6
Other areas					
Bridge Street	1	0	2	3	2
Cowell Street	1	2	2	5	3
Inkerman Street	2	2	1	0	0
John Street	0	0	1	1	0
Market Arcade	1	0	4*	demolished	demolished
Market Street	2	4	8*	5, part demolished	7
Murray Street	2	3	9*	4, part demolished	8
Park Street	0	1	0	4	4
Station Road	4	7	8	8	8
Stepney Place	2	2	1*	demolished	demolished
Stepney Street	3	3	1	0	3
Thomas Street	1	0	0	0	1
Upper Park Street	2	1	6*	7, part demolished	5
Sub-total	21	25	43	37	41
Town centre	21	28	46	39	50

Source: visual inspection of GOAD maps (figures do not tie exactly to GOAD summary reports)
Note: * partly affected by St Elli redevelopment

During the period 1992-96, when the changes to the town centre's environment took place, there was a slight fall in the number and floorspace of vacant units. The number of vacancies fell from 48 in 1992 to 41 in 1996; vacant floorspace fell by 13 k sq ft from 108 k sq ft in 1992 to 95 k sq ft in 1996. The fall did not reflect an overall increase in the use of floorspace in the town centre, since occupied floorspace fell by 59 k sq ft from 508 sq ft in 1992 to 449 k sq ft in 1996. Neither was it likely to have been greatly influenced by the environmental improvements. The fall was most probably a result of a reduction of outlet stock of 72 k sq ft, caused by publicly funded demolitions required to facilitate road, car parking and site development for the new St Elli shopping centre.

The number and floorspace of vacant outlets remained high during the period 1996-99. Although the St Elli shopping centre probably had a greater impact than the environmental improvements in enhancing convenience retailing and the range of major comparison shops it had not, by 1999, helped reduce the overall level of vacancies in the town. There were, however, commitments in the pipeline that would take up a large proportion of the vacant property recorded in the GOAD summary report. The former Tesco building in Park Street, was being altered, with a £0.5m town improvement grant, to accommodate a £2.3m investment by Agenda TV studios, bringing the promise of 100 jobs (*Llanelli Star* Sept 1998: 22). This building accounted for over one third (38 k sq ft) of the 97 k sq ft of the floorspace vacant in 1999. The development brought to an end the blighting effect of the run down and empty former Tesco store that had symbolised the town's decline for a decade.

Changing retailing structure

In 1982 the percentage of outlets and floorspace in Llanelli town centre used for convenience, comparison, service retailing or that were vacant were broadly similar to the UK national percentages for the same categories (Table 10.4). By 1992, when the town centre was perceived of as being in decline, the percentages, for floorspace area in particular, were different in several respects. The percentage of floorspace used for convenience retailing was much lower (index 36), and vacancies (index 162) was much higher in Llanelli than the national average for those categories in 1992. During the period 1992-96, when the environment of the town centre was improved, there was not a great change in the retailing structure of the town relative to the national picture. The direct impact of the environmental improvements on the retail structure of Llanelli town centre was, therefore, not great. The main change took place following the opening of the

ASDA store in 1997; by 1999 the percentage of floorspace devoted to convenience retailing in Llanelli town centre exceeded the national average (index 114).

Table 10.4

Percentage of floorspace area in Llanelli compared with UK

Type of outlets	% of area (index: ratio of Llanelli to UK %)									
	Nov. 1982		Oct. 1988		Sept. 1992		Dec. 1996		June. 1999	
	Llan-elli	UK	Llan-elli	UK	Llan-elli	UK	Llan-elli	UK	Llan-elli	UK
Convenience	17.5 (105)	16.6	16.3 (119)	15.5	5.4 (36)	15.1	4.8 (33)	14.3	16.4 (114)	14.4
Comparison	54.9 (96)	57.0	50.6 (94)	54.0	49.6 (95)	52.2	51.3 (96)	52.9	46.3 (85)	54.4
Service	17.0 (96)	17.8	22.1 (114)	19.4	25.3 (128)	19.6	23.4 (119)	19.6	19.9 (97)	20.4
Other	1.9 (239)	0.8	1.5 (99)	1.6	2.0 (89)	2.2	2.8 (177)	1.6	2.4 (144)	1.7
Vacant & under construction	8.8 (111)	7.9	9.4 (99)	9.6	17.5 (162)	10.7	17.4 (153)	11.3	15.1 (164)	9.2

Source: GOAD summary reports

Conclusions

The analysis of GOAD plan data suggests that the environmental improvements did not have a great impact on changes in retailer representation, or vacancies, in Llanelli town centre during the period 1992-97. However, by 1999, convenience retailing in the town had been dramatically enhanced, and the range of major comparison stores had been improved significantly, though vacancies outside the prime area remained high. The timing of the improvements to retail and service provision in Llanelli suggests the key impact of the development of the St Elli shopping centre. This clearly played a significant role in improving the town's shopping facilities. The shopping centre's key role in Llanelli's revitalisation does not necessarily "belittle" the positive effects of the environmental improvements, although public investment in the shopping centre site and car parking was far more important in initiating "a reversal" of the "commercial fortunes" of the town centre (Thomas and Bromley 2002). As other chapters explore, the public investment in the environmental improvements not only improved the appearance of the town, but also played a role in benefiting businesses and attracting significant private investment. To provide further context, the next chapter explores whether there is also a perceived association between environmental and economic improvement in other South Wales towns.

Chapter 11

Key informants' perspectives on comparable South Wales' towns

Introduction

One of the aims of the research is to explore the impact of the changes to the environment of Llanelli town centre post 1992 and consider these in a comparative South Wales context. In order to set the research findings in context and in particular to clarify the interpretation of the impact of public investment on Llanelli town centre, interviews were held with 18 key informants in late 2000 drawn from Llanelli and seven comparable towns in South Wales. The comparable towns, Aberdare, Barry, Caerphilly, Merthyr Tydfil, Neath, Pontypridd and Porthcawl, were chosen because it was understood that in each of the town centres the public realm had been improved substantially in the 1990s (see Fig 7). They were also broadly of comparable retail strength, all, with Llanelli, being ranked between 200 and 600 with a minimum of six multiples in the Hillier Parker survey of Shopping Centres (Hillier Parker, 1995). To obtain a variety of perspectives the aim was to interview two or three key informants in each town: one from the Welsh Development Agency (WDA) (where applicable), one from the local authority (LA), and one from either the private sector or a town centre manager (PS/TM). Three key informants were interviewed in Llanelli and five of the other towns, while owing to the absence of appropriate WDA representatives and a private representative two informants were interviewed in Barry and one in Neath. The key informants were selected because of their particular local knowledge of the towns and the businesses located within them. The interviews were held between September and December 2000. 7 interviews were "face to face", 11 were conducted on the telephone. A brief profile of the key informants, the interview date and the questionnaire that was used as a basis for the interviews is set out in Appendix 8, together with the responses of the key informants. The interviews provided a valuable retrospective exploration of the impact of public investment in town centres in the 1990s, given the lack of useful published findings.

A brief description of the cost, period and nature of the investment in the public realm for the different towns is provided in Table 11.1 Most of the improvements were carried out

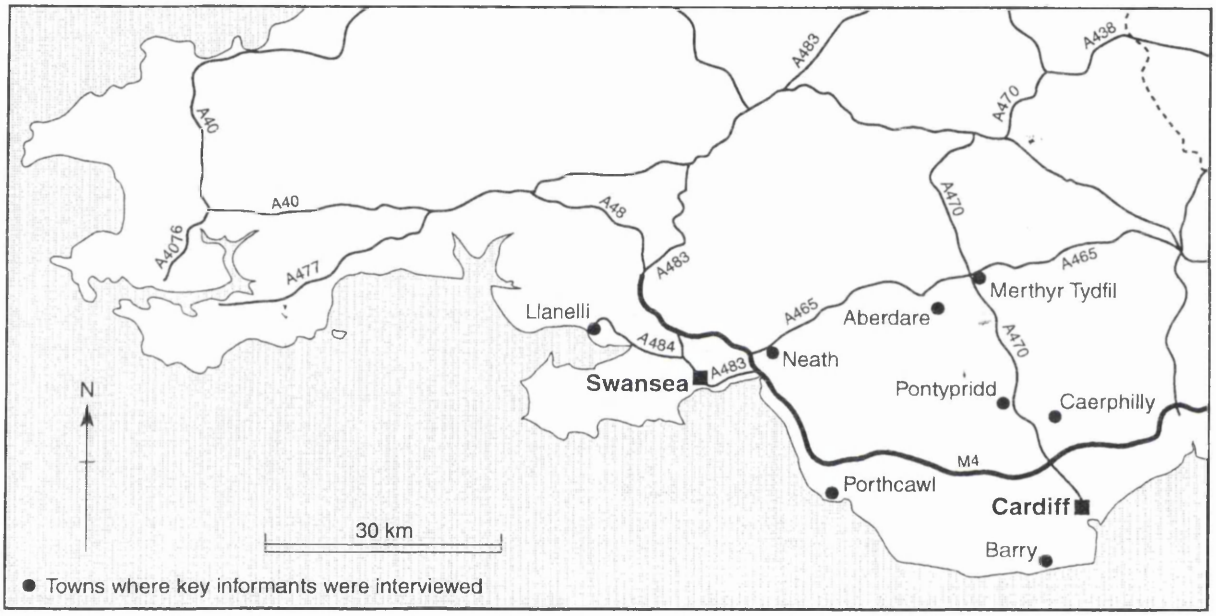

Fig 7: Towns where key informants were interviewed

Table 11.1

Cost, period and nature of the investment in the public realm

Towns	Cost (approx.)	Period (approx.)	Nature of investment
Aberdare	£2-3m	1991-99	Traffic management; widening pavements; new lighting columns; new squares; building facelifts; new car parks; demolitions; redevelopment of buildings
Barry	£2m	1994-2000	Pedestrianisation; conversion of derelict sites to car parking; building facelifts.
Caerphilly	£2m	1992-2000	New shopping centre; traffic calming; four new linked public squares with new facilities (Tourist Information centre, community centre, toilets); artwork.
Merthyr Tydfil	£2.8m	1991-95	Pedestrianisation; property improvements; private investment in Tydfil Centre; environmental improvements to gateways of the town
Neath	Not known	Late 1980s	Significant pedestrianisation scheme; upgrading of street furniture; new supermarket development (shops and car parking).
Pontypridd	£1-0.5m	1991-94	Limited public realm upgrading (one street)
Porthcawl	£6m	1993-2000	Pedestrianisation of John Street; refurbishment of the esplanade; building facelifts (Old Police station, Jennings Buildings); demolition of Dunraven Flats; works to access road leading into town.
Llanelli	£2m	1992-97	New paving and canopies; seating; building facelifts.

Source: Interviews with key informants 2000 in the 1990s. Typically the enhancements to the public realm involved streetscape improvements (paving, street furniture, building facelifts) usually costing £2m or more, often in association with pedestrianisation, traffic calming, new car parking and shopping centre development or refurbishment.

As an initial step in the comparative investigation key informants were asked to follow a scoring system to explore the impact of the completed public realm changes on town centre appearance, benefits to business, vitality, spread of benefit, and disruption. The scores were:

Significant negative impact	1
Minor negative impact	2
Minor positive impact	3
Significant positive impact	4

The scoring analysis excluded "don't know/ no view" responses. The results are set out in Table 11.2. The scores and other findings from the interviews are interpreted more fully in subsequent sections of this chapter, firstly focussing on Llanelli, and secondly exploring the Llanelli findings in a comparable context with other South Wales towns. Where relevant the mean score is presented in the text in brackets.

Table 11.2

Perceived impact of completed public realm changes

Towns	Organisation of key informant	Perceived impact					Scores
		Appearance	Benefits to business	Vitality	Private investment	Spread of benefit	Disruption
Aberdare	WDA	4	4	4	4	-	-
	LA	4	4	4	4	-	2
	PS/TM	3	3	3	4	3	-
Barry	*						
	LA	3	3	3	3	3	2
	PS/TM	3	3	3	3	3	-
Caerphilly	WDA	4	4	4	4	3	1
	LA	4	-	4	3	3	2
	PS/TM	4	-	4	4	-	-
Merthyr Tydfil	WDA	4	-	-	4	-	2
	LA	4	4	4	4	1	2
	PS/TM	4	4	4	4	1	1
Neath	**						
	LA	4	3	3	3	3	-
	***						
Pontypridd	WDA	4	4	3	3	3	2
	LA	4	4	4	4	3	-
	PS/TM	3	3	3	-	-	-
Porthcawl	WDA	4	-	-	-	-	-
	LA	4	4	3	3	-	2
	PS/TM	4	3	3	3	3	1
Total score		68	50	56	57	29	17
Mean score		**3.8**	**3.6**	**3.5**	**3.6**	**2.6**	**1.7**
Llanelli	WDA	4	-	4	4	-	-
	LA	4	4	4	4	2	2
	PS/TM	4	4	4	4	2	1
Total score		12	8	12	12	4	3
Mean score		**4**	**4**	**4**	**4**	**2**	**1.5**

Notes * WDA respondent thought Barry had not been the subject of a public realm enhancement scheme, more of a "repair" scheme

** No WDA respondent with knowledge of town

*** No PS/TM respondent

Scores: Significant negative impact 1 Minor negative impact 2
Significant positive impact 4 Minor positive impact 3
- Don't know/no view

Llanelli town centre

So far, the evidence from the Llanelli research suggests that the environmental changes to the town centre improved its appearance, played a part in attracting private investment and benefiting business, but probably did not, by 1998, have a dramatic and short-term impact on the town centre's economy. During late 2000, the Llanelli key informants were unanimous in thinking that the completed public realm improvements had resulted in significant positive change in relation to the town centre's appearance (4), benefits to business (4), its vitality (4), and the attraction of private investment (4). Not all of the perceived impacts were, however, positive. The key informants thought that the traders outside the improved area had disbenefited from the changes (2), corroborating earlier findings that the benefits were very localised.

They also agreed that the disruption caused by the works had resulted in a loss of trade in the short-term (1.5), again supporting earlier findings. As previously discussed, disruption is a common complaint in many UK town centres the subject of physical change (DOE 1997a; Lockwood 1997b). Overall, the key informants thought the completed public realm changes in Llanelli town centre were worthwhile largely because they improved the quality of the environment and image of the town as well as their role in attracting private investment. Whilst the public realm improvements were valued, other factors were perceived of as being effective in revitalising the retail economy. These were the presence of a clear development strategy for the town centre and the wider hinterland, the catalytic effect of the St Elli shopping centre and a town centre management initiative. Thomas and Bromley (2002) have also recognised the positive impact of the St Elli shopping centre in helping reverse the decline of the "commercial fortunes" of Llanelli town centre (Thomas and Bromley 2002).

Comparable towns in South Wales

As discussed earlier, one of the aims of the research is to explore the impact of the changes to the environment of Llanelli town centre post 1992 and consider these in a comparative South Wales context. This section of the chapter provides insight on the impact of the environmental changes for Llanelli and other comparable towns drawing on information from the key informants interviewed in 2000.

Closely mirroring the findings for Llanelli (4), most of the key informants for the comparable towns thought that the changes to the public realm within the town centres improved their appearance (3.8). There was a consensus that the improvements were significant in Caerphilly, Merthyr Tydfil and Porthcawl. The key informants based their views on a range of factors including personal observation, feedback from traders and the public, and whether the improvements received local or national awards. In common with Llanelli, the works in Aberdare and Caerphilly had received local or national awards, which corroborated the views of the key informants.

Again, as for Llanelli (4), most of the key informants for comparable towns thought that the completed public realm improvements had benefited businesses in the town centres (3.6). The key informants referred to a number of benefits including increased pedestrian flows or trade, better car parking and crime reduction through CCTV. They based their views on factors such as personal observation, feedback from traders, and vacancy rates. Apart from one reference to an evaluation study, there was an apparent absence of empirical evidence underpinning the key informants' views.

All the key informants for comparable towns thought that the completed public realm improvements resulted in an increase in vitality (3.5). This closely mirrored the Llanelli perspective (4). There was a consensus that the increase in vitality was significant in Caerphilly. In the other towns, two main reasons were given to explain why the increases in vitality were perceived as less significant. The first was the lack of a critical mass of change in the town due to limited public intervention. The second was the view that other factors such as the shopping offer, state of the economy and car parking were more important. It is also interesting to note that one key informant believed that people were staying longer, though not necessarily spending more, suggesting that increased vitality may not always increase trade. In the main, the key informants based their views on feedback from traders, observation or "gut feel". Only one respondent referred to pedestrian counts. Again, this suggests that the evidence of "cause and effect" was relatively weak.

The key informants for the comparable towns also thought that the completed public realm improvements resulted in an increase in private sector investment (3.6). The finding was similar for Llanelli (4). There was a consensus that the increase was significant in Aberdare and Merthyr Tydfil. The widespread perception was that the change in the appearance, image or product in the town centre was a factor that raised confidence and positively influenced investor decisions. The scale of impact depended on whether the changes were of sufficient "critical mass" to make a real difference. Many of the key informants were also able to cite examples of private investment that they believed had probably influenced investment decisions, at least in part, but there was little strong evidence of "cause and effect".

There was less agreement amongst the key informants for the comparable towns regarding the extent to which benefits spread outside the improved areas (2.6). None of the key informants thought that there were significant benefits to businesses outside the improved areas. Of those who did have a view, the majority thought there was a minor benefit, though two key informants thought that businesses outside the area had disbenefited from the changes. The two Llanelli key informants who had a view also thought that the traders outside the improved areas disbenefited from the changes (2). Whilst the findings are inconclusive they do suggest that the benefits to businesses outside the improved areas are less marked than within the improved areas, implying a localised impact and that the impact outside the improved areas may vary according to local circumstances. Again, the evidence supporting the key informants' views was not strong, though, in a minority of cases reference was made to vacancy rates, retailer representation and pedestrian flows to back up the opinions expressed.

Most of the key informants of the comparable towns thought that the disruption caused by the works may have resulted in a loss of trade for some traders in the short term (1.7). This mirrored the findings for Llanelli (1.5). Two key informants believed that some traders may have exaggerated the disbenefits either to shift blame for their business difficulties onto others such as the local authority, or to claim rate reductions. Most of the key informants claimed that their views were based on feedback from traders. However, none of the key informants referred to trader surveys or other empirical evidence, which would have strengthened the credibility of their opinions. Most key informants also thought there was a time lag between the completion of the improvements and any beneficial effect. It was suggested that there was likely to be a fairly short-term benefit as people were attracted back to the town following the cessation of disruption, with longer-term benefits as perceptions were changed and investor confidence grew. Small businesses with limited capital might wait some time, possibly several years, to consider the effect of the changes before making a positive investment decision. The benefits of town centre management and promotion, following the environmental improvements, were also assumed to take time to bear fruit. A time lag in relation to trading benefits has also been identified for pedestrianisation schemes (Hass-Klau 1993), and a study of the US Main Streets programme found that "job and business growth" took place "largely between the fourth and eight years" (DOE 1997a: 27).

As for Llanelli, all the key informants for the comparable towns thought that the completed public realm works were worthwhile. The resulting improvements to the environment were welcomed as well as a number of additional consequential social and economic benefits. The social benefits included a "feel good" factor, raised community confidence and civic pride. The economic benefits included enhanced vitality, the attraction of private investment, and recognition that the public realm improvements helped stem economic decline and enabled town centres to better compete with other retail centres including those out of town.

Whilst there was a strong conviction that the environmental improvements were worthwhile, most key informants recognised that other factors were also significant, and had to work in tandem, to effectively enhance the economy of town centres. Several key informants stressed the need for a strategic and comprehensive approach not only relating to a range of actions within town centres, but also involving the revitalisation of the wider economy of the region in which the town centre was situated, a view well documented elsewhere (BCSC 1996; Carley *et al.* 2000; Charles *et al.* 1999; DETR 2000b; Robson *et al.* 2000; Urban Task Force 1999). The general economic health of an area, including the attraction of well-paid jobs, was cited as an important influence on the success of any town centre regeneration initiative. The need for attractions within town centres was also thought to be crucial. Several key informants noted the important role that new anchor stores had played in attracting people into town centres and suggested that these had been vital to the success of stemming town centre decline, an issue elaborated further below (Thomas and Bromley 2002). Others referred to the importance of town centre management and promotion, and initiatives such as CCTV aimed at making a town centre feel safer (Oc and Tiesdale 1997a). The overwhelming view was that environmental improvements of the public realm are a necessary, but by no means sufficient, requirement for enhancing town centre vitality and viability.

One key informant put forward the proposition that in many declining towns in the South Wales' valleys environmental improvements without new anchor store development would be insufficient to stimulate regeneration. There was some evidence to support this view. In the case of Llanelli, which had environmental improvements and a new shopping centre with an anchor store, the key informants were unanimous in thinking that the public realm changes resulted in significant benefits to businesses as well as increases in vitality and private investment. In three out of four of the comparable towns where environmental improvements had been accompanied by major new store development or refurbishment, mean "town" scores were greater than the mean scores for "comparable towns" in relation to benefits to business, vitality and private investment - mean town scores were greater for Aberdare, Caerphilly and Merthyr Tydfil, but not for Neath. Although the key informants were asked to score the impact of changes to the public realm, not new shopping development, it is possible that they scored certain towns higher because of the combined effect of the environmental improvements and the new development. In practice, the key informants might have found it difficult to disaggregate the impacts of these two elements. The strong positive perceived impact of the changes to the public realm on benefits to business, vitality and private investment in towns such as

Aberdare, Caerphilly, Merthyr Tydfil and Llanelli might, therefore, have been partly due to the provision of new retail attractions, and other factors.

Prior to the opening of the St Elli shopping centre in Llanelli, the research suggested that the economic impact of the environmental improvements was positive, though not dramatic. By 2000, three years after the centre was opened, the economic impacts were perceived of as being significant. As discussed earlier, the possible difficulty of key informants disaggregating the impacts of different elements might be one reason that helps explain apparently changing attitudes in Llanelli over time - some of the impact attributed to the environmental improvements in 2000 may have been due to the new development. The findings by Thomas and Bromley (2002) that shopper satisfaction with the "attractiveness of the shopping environment" in Llanelli town centre rose "from a sound 55% in 1997 [before] to a resounding 83% in 1999" after the opening of the St Elli shopping centre lends weight to that proposition (Thomas and Bromley 2002). On the other hand the difference may relate to the time lags often associated with regeneration (DOE 1997a; Hass-Klau 1993); the public realm improvements in Llanelli town centre may have taken several years before they stimulated a significant economic benefit.

Conclusions

The earlier Llanelli research and the interviews with key informants in comparable towns in South Wales suggest that there is generally a perceived positive link between environmental and economic improvements in town centres. The consensus is that such improvements not only enhance the appearance of the towns but they may also increase vitality, help attract private investment, and benefit businesses although those benefits may be very localised. There is also general agreement that some traders may suffer short term trading losses due to disruption whilst the works are under construction; any resulting economic benefits may lag months or sometimes even years after the completion of the works. Although a perceived association between environmental and economic improvement in Llanelli and other South Wales towns was identified from the interviews with key informants in late 2000, the evidence inferring a causal link, much of which was anecdotal, was not strong.

This chapter has considered the impact of the changes to the environment of Llanelli town centre post 1992 in a comparative South Wales context. The next and final chapter draws together the main findings of the research and considers the policy implications of these findings for town centre regeneration in general.

Chapter 12
Conclusions

Introduction

In the late 1980s and 1990s there was a growing interest in the development of strategies to enhance the vitality and viability of declining town and city centres (for example, Boots 1996, 1999; DOE 1992; DTEDC 1988; DOE 1994; DOE 1997a; Evans 1997; HCEC 1994; Montgomery 1990, 1998; Urban Task Force 1999; URBED 1999, 2000; Vision for London 1996). In the UK, at least, the basic approach involved a combination of town planning controls to limit development outside town and city centres, coupled with positive action to improve the attractions, accessibility, amenity and management of those centres (DOE 1994; DETR 1996; DOE/WO 1993; NAW 2001; Scottish Executive 1999; Welsh Office 1996, 1999). As elaborated in chapters 1 and 2, a prolific practitioner literature emerged providing advice on town centre regeneration, and the academic literature also explored issues relating to the decline and regeneration of town and city centres. However, there has been little research to investigate the effectiveness of town centre regeneration strategies, or, in particular, the impact of environmental improvements on the commercial health of those centres (DOE 1997a; Hass-Klau 1993). This is a gap in knowledge that requires further research in order to inform future policy development and investment, particularly because large sums of public money are spent on environmental improvements. It is, therefore, important to know whether this investment is effective and worthwhile. To help plug the gap, this thesis explores the impact of public investment in Llanelli town centre post 1992, when the town centre's environment was enhanced. The research is an exemplar of applied geography, which aims to provide knowledge that will be useful to policy makers and practitioners involved with town centre regeneration (Graham 1997; Pacione 1999; Patton 1990).

Llanelli

Llanelli is a small town situated in South West Wales with an urban population of about 36,400 (Management Horizons 1992). It grew in the late nineteenth and early twentieth century as an industrial town whose wealth was based on the coal, steel and tinplate industries. In the second half of the twentieth century it began to decline, as jobs were lost in the traditional industries. Llanelli's town centre, which was thriving in the 1920s, was in serious decline by 1990, and its coastline, once the focus of a vast array of heavy industry, was derelict (BDP 1990; Carmarthenshire County Council/WDAa, no date; Carmarthenshire County Council/WDAb, no date). In 1990 the then Llanelli Borough Council and the Welsh Development Agency (WDA) joined forces to act to regenerate the economy and environment of the town, and developed plans to revitalise the coast and the town centre. Two publicly funded strategic roads were also completed in the 1990s. These were the Coastal Link Road, which by-passed the town centre, and the A484 which improved links between Llanelli and Swansea.

The plans for the town centre involved the purchase and preparation of land for a new shopping centre, and improvement of the environment of the public realm of the central areas. The Council and the WDA published revitalisation plans in 1992 (LDG 1992), and began to implement them the same year. The plans comprised three main elements: the improvement of the environment of the main shopping streets, the development of a new shopping centre incorporating a foodstore and a range of multiples, and the reuse of the former Tesco building for shopping use. Within six years all the key elements of the 1992 plan were realised. The environmental improvement of the central area was largely complete by 1996. The new St Elli shopping centre was opened in 1997, with an ASDA foodstore and a covered arcade of unit shops including a range of new multiples. The former Tesco building was occupied by Agenda TV studios in 1998. Whilst this use was not planned in 1992 it greatly enhanced the diversity of employment in the town, as well as bringing an empty building back into productive use. The public sector funded the public realm improvements, as well as land assembly and site development. The private sector funded the new shopping centre and other building development.

Methodology

As elaborated in chapter 4, a multi-method approach was adopted to explore the impact of public investment, particularly environmental improvements, on Llanelli town centre, as the best means of obtaining reliable evidence to inform the various explorations and conclusions from differing perspectives (Brannen 1992; Burgess 1982, 1991; Patton 1990; Philip 1998). This involved obtaining and analysing data from surveys of 300 residents and 123 traders, holding interviews with nine key informants who had a good knowledge of the town, and analysing GOAD plan data for five selected years over the period 1982-99. It also involved making generalised comparisons with the experience of other town centres drawn from a further 18 interviews with key informants.

The residents' and trader surveys were carried out in 1997 after most of the environmental improvements in the central parts of the town had been completed (1995/96) but before the St Elli shopping centre was opened (Nov/Dec 1997). The surveys, therefore, provide data that facilitated an exploration of the impact of the environmental improvements, without the distorting effect of the impact of the new shopping centre. However, it is also important to note that they also took place when the town was in the early stages of the regeneration lifecycle (DOE 1997a), when a significant amount of physical regeneration was complete or underway but when shopping and trader patterns had not had much time to adjust to the changes. The key informants with a good knowledge of Llanelli town centre were interviewed in 1998. Finally, further interviews with key informants were undertaken in 2000 to allow generalised comparisons with other town centres in South Wales to be made.

The following sections of this chapter summarise the main findings of the research and consider the policy implications of the findings for town centre regeneration in general.

Attractions

The range and quality of shopping and other facilities are key attractions that affect the vitality of town centres (Baldock 1989; Bianchini 1995; DOE 1992; DOE 1994; Evans 1997; Jacobs 1961; Montgomery 1990). Llanelli was well used as a shopping destination in 1997; most of the residents visited the town centre at least once a week. However, prior to the opening of the St Elli shopping centre in November/December 1997 there was a perceived deficiency in Llanelli town centre's shopping facilities. Most residents and traders thought that the attractions of the town centre, especially its shopping facilities, had declined in the years prior to 1997. They also agreed that there had been no improvement in the town's entertainment facilities during the same period. Most residents and traders were dissatisfied with the town's shopping and entertainment facilities in 1997. They were particularly critical of the provision of the range of shops, foodstores, variety stores, the outdoor market and toilets, and were only satisfied with banks, building societies and the indoor market. Despite the public investment, at the time of the residents' and trader surveys in 1997, there was general dissatisfaction with shopping facilities in the town centre, but, as will be discussed later, there was a dramatic improvement in the years following the opening of the St Elli shopping centre (Thomas and Bromley 2002).

Accessibility

Accessibility is a factor that can influence the retail strength of a town centre (Bromley and Thomas 1993b; DOE 1994; Evans 1997; URBED 1999). The publicly funded road infrastructure had perceived positive and negative impacts on the town centre. On the positive side, there was recognition by traders and residents that the Coastal Link Road had helped reduce congestion in the town centre. The perceived negative impact was a view by most traders that the A 484 has resulted in some loss of trade to Swansea.

With the exception of car parking, neither the residents, nor the traders thought that accessibility issues were major problems in Llanelli town centre. In 1997, most of the residents and the traders agreed that car parking was inadequate, despite the new car parking provision, though they acknowledged that parking facilities were better in Llanelli than in Swansea. Two key informants also thought, in 1998, that Llanelli offered car parking that was more convenient and cheaper than Swansea. Although the new Stepney Place car park was available at the time of the residents' and trader surveys in 1997, the main additional provision of 450 spaces for the ASDA foodstore followed the completion of those surveys. As previously discussed, concern regarding the adequacy of car parking to serve town centre shopping areas is well documented (Bromley and Thomas 1993b; DOE 1994; Guy 1998b; Lockwood 1997b; Page and Hardyman 1996; URBED 1999; Williams 1991).

Amenity

The amenity of a town centre reflects the extent to which it presents a pleasant, clean, well maintained and secure environment (DETR 2000b; DOE 1994; Evans 1997; Smith 1974; URBED 1999). Following the disruption of the construction phase, which was clearly detrimental to amenity, the completed environmental improvement works had made a marked positive impact on the appearance of the public realm in Llanelli town centre by 1997. Most residents and traders agreed that the appearance of the streets in the town centre had been improved, and that the new Stepney Place car park had a pleasant appearance. There was also independent recognition of a positive change in the town centre. The up-grade of Lucania Buildings won a Civic Trust Award in 1995/96 (Carmarthenshire County Council/WDA d no date). The environmental improvements won a national Civic Trust award in 1996/7, the scheme being "one of only 38 projects in the UK to achieve a special mention, a category for design projects of specific benefit to the local community" (Carmarthenshire County Council/WDA d no date; Civic Trust Press release 18 April 1997). There was, therefore, strong evidence that the public investment had improved the appearance of the town centre by 1997. The Llanelli key informants interviewed in 1998 and 2000 supported this proposition. Most of the key informants for comparable towns also thought, in 2000, that the completed public realm works had significantly improved their appearance. Such high levels of satisfaction with amenity improvements are not uncommon and have been identified in other UK surveys (DOE 1997a).

Whilst the appearance of the streets in Llanelli town centre had improved, fewer residents and traders thought that the changes had resulted in a more pleasant shopping environment by 1997, probably because of disruption from the construction of the St Elli shopping centre that was underway, and the fact that the range of shops was limited at that time. It is interesting to note that other.shopper surveys in Llanelli showed that there was a dramatic increase in levels of satisfaction with "the shopping environment" between 1997 (55%) and 1999 (83%) (Thomas and Bromley 2002), suggesting the critical impact of the opening of the St Elli shopping centre on perceptions of the attractiveness of the shopping environment, even though the street improvements had been completed before its opening. The change in attitude is probably explained by factors including the cessation of disruption on the shopping centre site, the attractive design of the St Elli shopping centre and perhaps a tendency for shoppers to consider an improved range of shops as a component of the "shopping environment".

Perceptions of the impact of environmental improvements on the commercial fortunes of Llanelli town centre

Whilst the appearance and the environment of the town had been improved, the research suggests that, by 1997, shortly after the completion of the main environmental works, there was not a dramatic improvement in the town centre's commercial fortunes.

Most of the traders thought the environmental changes had little effect in benefiting their business. A minority acknowledged a minor benefit. Very few thought the changes were of significant benefit. Furthermore, more traders reported real reductions in turnover and profitability over the period 1992-97, than reported increases suggesting that the environmental improvements had been insufficient to reverse the town's retail decline. Whilst the decline may have been partly caused by the disruption, since about a fifth of the traders claimed that disruption was a disbenefit to their business, it is important to note that difficult trading conditions such as those identified in Llanelli were common throughout the UK in the early 1990s; other factors such as the general economic climate may, therefore, have been at play (Lockwood 1996).

Residents' and trader perspectives also provide evidence to suggest that the overall vitality of the town had not significantly improved shortly after the completion of the environmental improvements. Although most residents thought their use of the town had not changed in the years prior to 1997, more claimed that they used the town less than they used to, compared with those who thought they used it more. The main reason they used the town less was because of disruption; the main reason they used the town centre more was an improved environment. The majority of traders also thought that the streets were less busy after the improvements than before them.

The residents' survey also showed that, in 1997, Llanelli town centre only retained a dominant role as a clothes shopping centre. This also suggests that the environmental improvements alone had been insufficient to boost Llanelli's retail strength, although it is interesting to note that the dominance of Swansea city centre was also restricted to specialist goods such as clothing and footwear in the mid 1980s (Bromley and Thomas 1993c: 234).

By 1997, the environmental changes had not been accompanied by an improvement in the range of attractions in the town. In fact, as previously discussed, most residents and traders thought that the attractions in the town centre, especially its shopping facilities, had declined in the years prior to 1997. GOAD plan analysis also shows that during the period 1992-97, when the town's environment was changed, there was a decline in the number of convenience and comparison outlets, although the number of major comparison stores, mainly national multiples, remained at a stable level.

There was also some evidence to suggest that there was a small reduction in the number of people employed by the traders over the period 1992-97, although there was an increase in part-time employment in line with national trends (Kirby 1993; Montgomery 1990).

The evidence so far, primarily reflecting resident and trader perspectives in 1997, suggests that the environmental improvements did not have a significant positive impact on the town centre's commercial fortunes in the short-term. However, it is possible that there may be a time lag between the completion of the environmental improvements and the identification of more significant benefits. By 1998, two years after the completion of the environmental improvements, most of the Llanelli key informants challenged the notion that environmental improvements would have such a limited impact on turnovers. The President of Llanelli Chamber of Trade and Commerce specifically claimed that a significant number of members reported that the improvements had "helped their turnovers to increase". Furthermore, one of the key informants, a retailer in Vaughan Street and chairman of the Llanelli Trading Committee, thought that there was a recovery of use of parts of the town because of the improvements. By 2000, four years after the completion of the environment improvements all three key informants interviewed thought that the environmental improvements had resulted in a significant increase in vitality and benefits to businesses. Positive benefits to businesses and vitality, some of which were perceived of as being significant, were also identified by the key informants for comparable towns in South Wales, although the evidence of a causal link was not strong.

A possible explanation for these findings is that the adverse impact of the disruption caused by the construction of the environmental works on trade and vitality lingered for some time after the completion of the works. It probably took some time for shoppers to return to Llanelli town centre and take advantage of the improved environment before a recovery in vitality and trade was evident. On the other hand, the opening of the St Elli shopping centre might have been the main reason for any increase of trade and vitality in Llanelli town centre, rather than a time lag involving commercial recovery following cessation of disruption.

The spatial impact of the environmental improvements

The evidence from the research suggests that the impact of the environmental changes on benefits to businesses, turnover, vitality and employment may have been localised, not spreading out far from the areas improved.

A higher proportion of traders in the prime and improved areas as well as the major comparison stores thought that the changes in Stepney Street and Vaughan Street were beneficial. A higher proportion of larger stores thought the changes in Vaughan Street were beneficial. The findings relating to store type and size may also reflect location as most of the comparison and larger stores were situated in the prime and the improved areas. This suggests that the benefits were localised.

A similar pattern of localised impact was identified in relation to turnover. Outside the prime and the improved areas only a minority of traders claimed that their turnover was higher in 1997 than it was in 1992. In contrast, most of the traders in the larger shops and those located in the prime areas claimed real turnover increases. Furthermore, more traders in the improved areas reported higher turnover than those located elsewhere. This suggests that the improved central areas traded relatively well 1992-97, although overall the town centre was probably in decline. It would, however, be wrong to conclude that the changes to the town's environment had caused the turnover increases in the central areas. The perceived impact was not great at the time of the trader survey in 1997. For, example, only a small number of traders thought that their turnover was higher because of the works to Stepney Street, Vaughan Street and the multi-storey car park. The most commonly cited reasons given by traders for turnover increase were better management and product range.

There was also some limited evidence to suggest the vitality of the improved central parts of the town may have increased. Pedestrian counts in Vaughan Street and Stepney Street were higher after the improvements than before them. Those were also the streets that the majority of residents always visited when they shopped in town and were mentioned most often by the minority who said they used certain streets in the town more than they previously did. Furthermore, less than half of the traders located in the improved prime area thought that there were fewer shoppers in their streets. The evidence, whilst not clear cut, suggests that the vitality in the central, improved area, may have marginally increased even though, as discussed earlier, overall vitality in the town centre may have declined in the years prior to 1997.

There was also spatial variation of employment change. A higher proportion of traders in the prime areas, and the improved areas, reported increased employment compared with traders located elsewhere in the town centre. On the face of it, this might imply that the improvements had positively influenced trader decisions in relation to employment change. However, the perceived influence was minimal in 1997. The vast majority of traders thought the changes made no difference to the numbers employed. If anything, the perception was that there was a small negative impact. Furthermore, the traders most frequently mentioned more business and flexible hours of working as reasons for employment increase; and less business or company policy as reasons for employment decrease. The key informants did not challenge these findings in 1998.

By 1997, one year after the environmental changes were completed, the central improved parts of the town were the areas that performed best in terms of benefits to businesses, turnover, vitality and employment change. These positive impacts were localised and did not appear to have spread out from the improved areas. Despite the trader acknowledgement of the benefits of the environmental changes, most did not believe they were a major influence on turnover or employment change. Furthermore, as discussed previously, few residents used the town centre more in 1997 because of the environmental improvements. This evidence corroborates the findings discussed earlier that the environmental improvements did not produce a significant change in the town's commercial fortunes in the short term; and additionally suggests that the benefits were not widespread.

The key informants confirmed, in 1998, that the concentration of the physical improvements in the central areas of the town centre led to frustrations because some traders felt left out of the revitalisation programme. Regeneration plans by Carmarthenshire County Council and the WDA, published in 1998, sought to address this criticism by proposing new development and environmental improvements in the more peripheral parts of the town, that were left out in the 1992 plan (Carmarthenshire County Council/WDAd no date). By 2000, these plans remained unimplemented and two Llanelli key informants interviewed in that year thought that some traders outside the improved area may have disbenefited from the changes. Most of the key informants in the comparable towns in South Wales thought that there was a minor positive benefit outside the improved area, the exception being Merthyr Tydfil where two key informants thought that there was a significant negative impact outside the improved area. Whilst the key informants' views of the nature of the impact on the adjacent unimproved areas, therefore, varied for different towns, perhaps reflecting a variety of local circumstances, it is difficult to draw firm conclusions as no empirical evidence was referred to in order to corroborate those views.

Private sector investment

Authors in the UK and the USA have claimed that there is often a link between the improvement of the environment and the attraction of private sector investment, but not invariably so (DOE 1988, 1995, 1997a; DETR 1999; English Heritage 1999; Loxton 1995; Robertson 1993; Scottish Executive 1999). This link was explored in relation to investment by existing traders, the occupation of vacant floorspace by new businesses and investment by developers for Llanelli.

A majority of traders invested in their businesses during the period, 1992-97, when the environment of the town centre was improved. Indeed, by 1997, Carmarthenshire County Council and the WDA claimed that £6m of private investment in shop improvements were attracted because of the changes to the town (Carmarthenshire County Council/WDAa no date). This estimate is not inconsistent with the findings of the trader survey, but in 1997, only a very small minority of traders thought that the changes in the town significantly influenced their decisions to invest. The traders most commonly claimed that they had invested to modernise or improve their image or service, not because of the improvements to the environment of the public realm. The Llanelli key informants recognised, in 1998, that national investment policies and confidence in the town centre were probably significant influences on investment. However, they also believed that major stores such as Marks and Spencer and Woolworths had invested, at least in part, because of the changes to the town's environment.

A number of vacant buildings, whose external appearance had been improved with public funding assistance, subsequently attracted new occupiers and private investment. Three examples serve to illustrate the point. Firstly, there was the attraction of Etam to the building formerly occupied by Poundstretcher in Stepney Street following its refurbishment in 1994. The replacement of Poundstretcher, a discount outlet, with Etam, a quality fashion retailer, represented a small but significant symbolic step of renaissance. Secondly, there was the attraction of a £1m investment by Wetherspoon to the old cinema in Stepney Street in 1998, a building whose external appearance had been improved together with the adjacent Lucania Buildings by public funding. The promoters of this development confirmed that the "new look town" was influential in their decision to invest (*Llanelli Star* March 26th 1998). Finally, there was the £2.3m investment by Agenda Studios in the refurbished former Tesco building in Park Street in 1998, whose external appearance was improved with a £0.5m public sector town improvement grant (*Llanelli Star* September 3rd 1998).

Perhaps more significantly, the investment in the public realm, and the promotion of a clear regeneration strategy, played a part in attracting Redrow to develop the new £20m St Elli shopping centre (Interview with Peter Howarth, October 1997). The influence of the public realm improvements was, however, not great compared with the public investment in assembling and preparing the site, and it apparently had little bearing on Sun Life's subsequent decision to buy and manage the completed centre, because it was "a good deal" (Telephone interview with Huw Stephens, July 1997).

Given the large extent of private investment in the town centre in the late 1990s it is not surprising that all three Llanelli key informants thought, in 2000, that the completed public realm improvements had resulted in a significant increase in private investment. That does not necessarily mean that the improvements were a significant influence on the investors' decisions, but they certainly were a factor that played a part in Redrow's decision to develop the St Elli shopping centre. The improvements apparently also played a part in encouraging others, such as Woolworth and Wetherspoon, to invest in the town. The key informants for the comparable towns also thought, in 2000, that the completed public realm improvements had resulted in an increase in private sector investment, in some cases significant, though, once again, the evidence of a causal link was not strong.

The competitive status of Llanelli town centre

Since the early 1990s, Carmarthen and Swansea have been perceived as the two town centres that have most strongly competed with Llanelli town centre as retail destinations (BDP 1990; Management Horizons 1992). Swansea competed with Llanelli as the main shopping location for clothes and furniture goods. Trostre Park was the main out of town competitor location for grocery and DIY goods.

The residents thought that Llanelli's shopping and entertainment facilities, as well as the shopping environment, were worse than those in Swansea in 1997, although car parking facilities were perceived to be better in Llanelli. Llanelli's shopping facilities and the shopping environment were also thought to be worse than those in Carmarthen in 1997, but ease of access by car was considered better in Llanelli. The residents and the traders claimed that Llanelli town centre had declined relative to Carmarthen and Swansea in the years prior to 1997. This was mainly because they thought that the shopping facilities were better in both towns, and the environment better in Carmarthen. Despite these perceptions Llanelli may have made some progress in narrowing the competitive gap with Swansea, but not Carmarthen. The percentage increase in multiples over the period 1989-95 was higher in Llanelli compared with Swansea, and Llanelli moved up the retail rankings whereas Swansea's position declined. In contrast, the percentage increase in multiples was greater in Carmarthen compared with Llanelli, and Carmarthen increased its position in the retail rankings relative to Llanelli (Hillier Parker 1991; Hiller Parker May and Rowden 1996).

More residents visited Swansea and Carmarthen less often than they used to compared with those who visited those centres more often. The most commonly cited reasons why residents used Swansea more was better shopping facilities; they visited Carmarthen more because of better shopping facilities and a nicer or better environment. The main reason why the residents used Swansea and Carmarthen less was because of personal mobility problems. The influence of personal mobility on residents' choice of UK shopping destinations is well documented (Bromley and Thomas, 1995; Guy 1998a; Thomas and Bromley, 1995: Montgomery 1990; Westlake 1993).

A higher proportion of the car-less, and those living alone with children under 16, used Swansea town centre less often than they used to. This is further evidence that the less mobile residents were using Swansea less often than they used to, and emphasises the importance of personal mobility factors in influencing changing use rather than the characteristics of the shopping centres. A similar pattern was evident for Carmarthen. A higher proportion of residents without a car used Carmarthen town centre less often than they used to. Again, the change in use was most often explained by personal mobility factors rather than by the changing characteristics of the shopping centres. There was no evidence, in 1997, that the environmental improvements changed the competitive position of Llanelli relative to Carmarthen and Swansea.

Variations in attitudes of residents, traders and key informants

The attitudes of residents with different socio-economic characteristics varied. There was some evidence that the expectations of residents who were better off, or those who were more mobile, may have been higher than those of the more disadvantaged. For example, a greater proportion of residents in the higher social classes were dissatisfied with shopping facilities, restaurants and cafes, and ease of access by public transport. A higher proportion of car owning residents were also dissatisfied with restaurants and cafes. Proportionately more residents in households with at least one adult in work were dissatisfied with car parking. Variations in attitudes between different types of residents in relation to satisfaction with shopping facilities and the attractiveness of the environment were also reported in Ystalyfera (Bromley and Thomas 1995). There was also some variation in residents' satisfaction relating to location. A higher proportion of Llanelli residents were dissatisfied with the attractiveness of the shopping environment compared with Burry Port and Llangennech residents.

The attitudes of the major comparison stores and the independent traders varied. A higher proportion of the major comparison stores were satisfied with street events, street cleaning, crime prevention and feeling of safety, although a lower proportion were satisfied with restaurants and cafes, compared with other traders in the town. The Llanelli key informants also believed, in 1998, that there were differences in attitudes between the national and independent traders. They thought that negative views on the changes in the town were most common amongst local traders whose businesses were trading under difficult conditions. In contrast, they thought that the national traders, who were performing better, had a longer term and more positive outlook. This may reflect a difference in management outlook or vision, or perhaps the fact that the independents were struggling to survive and felt they would benefit less from any change. They may prefer the status quo rather than risk change, even if the status quo may result in continued and gradual decline. As previously discussed, Hass-Klau (1993) also identified a difference in attitude between the "sceptical" local traders and the "neutral or more optimistic" national stores in relation to the impact of pedestrianisation schemes (Hass-Klau 1993: 21).

There was also some evidence that trader satisfaction also varied in different locations within Llanelli town centre. There were, for example, small differences between the level of trader satisfaction with price of goods, street events, and the outdoor market in improved and unimproved areas. Furthermore, proportionately more traders in the periphery (mainly independents) were least satisfied with feeling of safety.

In some cases, the attitudes of the residents and traders varied. Compared with the traders, proportionally more residents reported higher levels of satisfaction with certain indicators of the town's attractions (range of shops), accessibility (ease of access), and amenity (street cleaning, crime prevention measures). Furthermore, whilst most residents were satisfied with crime prevention measures, most traders were not. The residents were also more willing to recognise the new private investment that had been attracted to the town. Again, as previously discussed, the generally more positive attitudes of residents compared with retailers appears to fit the pattern identified by Hass-Klau (1993) in relation to pedestrianisation schemes. In contrast, a higher proportion of the traders thought the appearance of the streets had improved compared with the residents, though both groups identified an improvement, indicating a positive outcome of the public investment on the amenity of the town centre.

The value of environmental improvements compared with other regeneration initiatives

The residents and traders valued environmental improvements less than improvements to accessibility or the town's attractions. This view was consistent with the views of the key informants, in 1998, who thought that the new shopping centre would be more effective in drawing shoppers into the town centre. The rationale for this view was well summed up by the chairman of Llanelli Trading Committee (Tony Riddout):

> "It is the new shopping centre that is going to have the biggest effect. The environmental changes are just going to make it a much more pleasant shopping experience, which hopefully will hold the people in the town when they get there. And they will come back because it is nice. But ultimately the new centre is the draw. Without that they would not be there in the first place" (Interview, July 1998).

In 2000, the Llanelli key informants also agreed that the catalytic effect of the new shopping centre was important but also mentioned other factors such as the presence of a clear development strategy for the town centre and the wider hinterland, and a town centre management initiative. The key informants for comparable towns in South Wales also recognised that as well as environmental improvements other factors were important including the general economic health of the area and the need to secure town centre attractions. In this context, several key informants recognised the pivotal role of new food anchor stores in arresting the retail decline of town centres.

Evidence from an analysis of GOAD plans supports the proposition that the new shopping centre had a significant impact on improving convenience and comparison shopping provision in Llanelli town centre during the period 1997-99. During the period 1992-97, when the town's environment was changed, there was a decline in the number of convenience and comparison outlets, although the number of major comparison stores, mainly national multiples, remained at a stable level. The improved central area retained its share of major stores. The peripheral area, including that subject to some environmental improvement, continued to decline. The reversal of the decline in the town's fortunes became evident after the opening of the St Elli shopping centre. This dramatically increased the area of convenience floorspace and the number of multiples in the town. Other research based on shopper surveys showed that satisfaction with the "range of goods on offer" in Llanelli town centre increased from 51% in 1997 to 82% in 1999 following the opening of the St Elli shopping centre (Thomas and Bromley 2002).

The residents and traders were aware of the need for further change to improve the town centre in 1997. The residents' top five mentions for improving the town centre at that time were a better range of shops, toilet provision, more facilities for the young, more entertainment facilities and improved facilities for the disabled. The traders' top five mentions for improving the town centre were a better range of shops, improved car parking, more entertainment facilities, improvements to remaining run-down areas and security. Both groups identified the top priority as the need to improve the town as a shopping destination by developing a better range of shops and interestingly the traders, not the residents, were more concerned with extending the environmental improvements more widely. The residents might have been content with a better quality and more compact centre, whereas the traders might have been concerned to draw trade in the peripheral run down areas in which many of them were located.

The key informants, in 1998, thought that the main priorities were improving the remaining rundown peripheral areas and the indoor market, enhancing town centre management (including security, and general communication), and promotion. By the time the key informants were interviewed in 1998, the St Elli shopping centre was open, and ASDA and several new multiples were trading. This addition to the range of shops probably explains why the key informants did not call for an improvement in shopping facilities in 1998.

Although there was widespread recognition, in 1997, that changes were required to revitalise the town centre there was also widespread recognition that the appearance of the streets in the central parts of the town had been improved over the period 1992-97, and, by 1998, that the range of shops had improved. Probably as a result of the changes and the plans for a new shopping centre, by 1997, over three-quarters of the residents and traders had greater confidence in the town and its prospects for improvement. It is interesting to note that, by 1998, the chairman of Llanelli Trading Committee thought that the town had a "rosy" long-term future because of the "ASDA development" (Interview with Tony Riddout, July 1998). Confidence for the future of the town probably turned more on the new attractions than the improved environment.

Managing change

Town centre management is a recommended part of the action required to enhance the vitality and viability of town centres (DOE 1994; DOE 1997a: DETR 1996; Medway *et al.* 1998; Oc and Tiesdale 1997a). The changes in Llanelli town centre did not incorporate a strong town centre management dimension. Perhaps it is, therefore, not surprising that more traders were dissatisfied with town centre management than were satisfied. A minority of traders also thought that the changes to the town, including disruption, the delay of the new shopping centre and poor public sector performance were disbenefits to business. One key informant also thought the changes were drawn out far too long, probably partly due to indecision by the local authority, and that the revitalisation programme was poorly communicated within the town. The residents were fairly evenly divided with regard to their satisfaction with town centre management, though residents aged 16-59 and the unemployed were more dissatisfied than other groups. In 1995, the Llanelli Trading Committee was set up to improve town centre management in Llanelli. The committee, chaired by the manager of Woolworths, involves representatives from the local authority as well as independent and multiple retailers. The increased emphasis on town centre management should be welcomed as a useful compliment to the physical regeneration of the town.

Sustainable development

The revitalisation of town centres is an example of an activity that can contribute to the governments' sustainable development policy (Audit Commission 1999; DETR 1998a). Better shopping facilities in accessible town centres can also help address the problems of "disadvantaged consumers" (Westlake 1993: 172; see also Bromley and Thomas 1995; Guy 1998a; Thomas and Bromley 1995; Montgomery 1990). Before the changes to Llanelli town centre the residents had a poor choice of convenience retailers, especially food, and a limited range of comparison outlets. The environment of Llanelli town centre was outdated and tired, with little investment in the public realm since the first pedestrianisation schemes of the 1970s. As a result of the public and private investment in the town in the period 1992-97 the shopping environment and the range of shops was significantly improved. The town's car parking was also enhanced and new bus bays were provided near to the entrance of the St Elli shopping centre. Much of the new shopping centre was also redeveloped on derelict land. Improved shopping facilities were made available to those who rely on public transport as well as those with access to a car; to the advantaged as well as the disadvantaged groups of Llanelli society. The revitalisation scheme in Llanelli town centre, therefore, met several of the principles of sustainable development. It involved the improvement of the environment, the clean-up and reuse of derelict land, and the provision of better shopping facilities accessible to a wide range of socio-economic groups, including the disadvantaged groups who might have little choice other than to shop in the town.

Conclusions

A commonly held view developed in the late twentieth century that the improvement of a town centre environment would lead to the improvement of the economy of that town. The argument was that a physically more pleasant town would attract more people, who would spend more. Turnovers and profits would increase, assisting businesses, and enabling them to pay higher rents. Developments would become more viable creating favourable conditions for new development and the attraction of private investment. Through this process the vitality and viability of town centres would become enhanced. Of course, it was acknowledged that other factors were also important vehicles in revitalising declining town centres. Practitioners argued that amenity improvements should be accompanied by other initiatives aimed at enhancing attractions and accessibility, taken forward in the context of a framework of town centre management (DOE 1994). It was the combination of these initiatives tailored to the particular needs of a town that would best guarantee positive results. It was long recognised that environmental improvements alone might not reverse decline in a dying town centre; and that they could have little value like "putting cosmetics on a corpse" (DOE 1994: 37). The research by Colliers Erdman Lewis (1995) also challenged the conventional wisdom that a good environment automatically created a good economy. Yet all over the UK, and elsewhere in the world, practitioners continue to improve the environment in declining town centres believing, with little assurance, that they would help the economy of the town as well as improving its amenity. Improving the environment of the public realm is an obvious area of activity that the promoters of town centre revitalisation can relatively easily implement. It is not, therefore, surprising that it is often high up on the town centre revitalisation agenda.

In the short term, the environmental improvements in Llanelli town centre were associated with an adverse impact on amenity, trade and vitality during the construction phase, and a time lag before there was a recovery in trade and vitality. The localised impact of environmental improvements also led to some frustrations in the trader community located in the unimproved areas because they felt left out of the improvement programme.

On the other hand, there were also economic benefits, though these were not significant, in the short term. Despite the nearby disruption of the construction of the St Elli shopping centre, in 1997, over a quarter of the traders in the town and about half of the traders in the improved areas thought the completed environmental changes brought minor benefits to their businesses. The environmental improvements undoubtedly played a part in attracting a significant amount of private investment in the town centre, probably in excess of £30m, including the St Elli shopping centre which dramatically improved shopping facilities in the town after its opening in November/December 1997. Whilst the public investment in land assembly, infrastructure and derelict land reclamation may have been more significant, it would be wrong to undervalue the role that the environmental improvements played in helping to attract such a major investment to a declining town that had struggled for many years to secure new private shopping development. The environmental improvements themselves were insufficient to boost Llanelli town centre's retail strength, but they played a part in securing private investment in new shopping attractions that helped to reverse the town centre's retail decline.

Environmental improvements may not stimulate a dramatic and short-term regenerative impact on the economy of a town centre, particularly one in a weak market area. The experience of Llanelli, however, and claims elsewhere, suggest that they can play a part in benefiting business and attracting private investment, as well as improving amenity.

However, the most effective contribution of environmental improvements may be their role in "raising confidence" as a means of attracting private investment in attractions, which in turn, may be more effective in reversing town centre decline. The long term success of a strategy to regenerate a town centre utilising environmental improvements as a component of change may, therefore, depend to a large degree on the *potential* of that town to attract private investment. In Llanelli, that potential was realised, but that does not imply that environmental improvements will always be a catalyst to trigger the investment that may be required to address the problems of a declining town centre. Much will depend on the circumstances of the particular town and its overall potential for positive change.

Appendix 1

Residents' survey: location and number of households surveyed by ED in different locations

Llanelli

ED code	Street name	Number surveyed
FE3 – middle status	Bryngwyn Road	9
	Bryn Elli	10
	Bryn Golau	3
	Dafen Road	1
	Glas Fryn	4
	Lon yr Ysgol	3
	Nant y Bryn	7
	Y Gaer	2
	Total	39
FP1- higher status	Aelybryn Close	1
	Aelybryn Drive	3
	Felinfoel Road	10
	Gower View	4
	Heol Buckley	4
	Heol Innes	6
	Heol Trubshaw	2
	Parc HowardAve	5
	Penyrheol Drive	5
	Total	40
FP5- lower status	Arfryn Ave	4
	Corporation Ave	5
	Glasfryn Terrace	1
	Gower View	4
	Heol Goffa	6
	Heulwen Terrace	2
	Llanerch Terrace	1
	Llys Fran	4
	Ty'r Fran Ave	5
	Warner Place	1
	Waun Road	8
	Yr Hafod	2
	Total	43

Burry Port

ED code	Street name	Number surveyed
FB4 – middle status	Brodawel	2
	Elkington Road	6
	Mansel Street	6
	Park Terrace	4
	Sandfield Road	6
	Snowdon Road	1
	Springfield Terrace	3
	Stepney Road	2
	Total	30
FB2 – higher status	Colby Road	7
	Dolau Fan Road	23
	Total	30
FB8 – lower status	Cliff Terrace	11
	Heol Vaughan	5
	Tan y Bryn	11
	The Cliff	1
	Y Derwydd	2
	Total	30

Llangennech

ED code	Street name	Number surveyed
FN6 – middle status	Afon Road	5
	Bridge Street	4
	Clos Maes Isaf	1
	Maes Road	10
	Station Road	10
	Total	30
FN5 – higher status	Hendre Cresent	2
	Hendre Park	15
	Hendre Road	13
	Total	30
FN3 – lower status	Bank Road	7
	Bridge Street	5
	Mwrwg Road	2
	Tirgof	14
	Total	28

Appendix 2
Residents' survey questionnaire

....
....

	Date	Time	No contact	Questionnaire completed	Refusal	NN
First call						
Second call						
Third call						

Interview the principal shopper in the household

1. Age Group [guess] [Circle]

Under 30	30 - 44	45 - 59	60 +
1	2	3	4

2. Sex [Circle]

Male	Female
1	2

3. How often do you shop for groceries? [Circle]

Daily	Several times a week	Weekly	Fortnightly	Monthly	Less frequently
1	2	3	4	5	6

3a. Where do you do the majority of your grocery shopping?

Name of shop	Area/Street	Village/Town
....	....	....
....	....	....
....	....	....

3b. How do you usually travel there? [Circle]

Foot	Bus	Free bus	Own car	Park/ ride	M/ cycle	Bicycle	Train	Taxi	Lift
1	2	3	4	5	6	7	8	9	10

3f. If yes,tell me where you previously shopped for groceries

Name of shop	Area/Street	Village/Town
....	....	....
....	....	....
....	....	....

3g. And tell me the reasons why you changed location

....

....

4. How often do you shop for clothes? [Circle]

Weekly	Fortnightly	Monthly	Every 2 months	Every 6 months	More frequently	Less frequently
1	2	3	4	5	6	7

4a. Where do you do the majority of your clothes shopping?

Name of shop	Area/Street	Village/Town
....	....	....
....	....	....
....	....	....
....	....	....

4b. How do you usually travel there? [Circle]

Foot	Bus	Free bus	Own car	Park/ ride	M/ cycle	Bicycle	Train	Taxi	Lift
1	2	3	4	5	6	7	8	9	10

4c. Do you shop occasionally for clothes elsewhere? Yes/No [Circle] If yes where?

Name of shop	Area/Street	Village/Town
....	....	....
....	....	....
....	....	....

4d. Have you changed the location of your main clothes shopping in the last few years? Yes 1

Name of shop Area/Street Village/Town

....

....

....

5a. Do you shop for furniture elsewhere? Yes/No [Circle] If yes where?

Name of shop	Area/Street	Village/Town
....	....	....
....	....	....
....	....	....

5b. Have you changed the location of your main furniture shopping in the last few years? Yes

5c. If yes, tell me where you previously shopped for furniture

Name of shop	Area/Street	Village/Town
....	....	....
....	....	....
....	....	....

5d. And tell me the reasons why you changed location

....

....

6. Where do you do the majority of your electrical goods shopping?

Name of shop	Area/Street	Village/Town
....	....	....
....	....	....
....	....	....

6a. Do you shop occasionally for electrical goods elsewhere? Yes/No [Circle] If yes wher

Name of shop	Area/Street	Village/Town
....	....	....
....	....	....
....	....	....

6b. Have you changed the location of your main electrical goods shopping in the last few yea
Yes 1 /No 2 [Circle]

Name of shop	Area/Street	Village/Town
....	....	....
....	....	....
....	....	....

7a. Do you shop occasionally for DIY goods elsewhere? Yes/No [Circle] If yes where?

Name of shop	Area/Street	Village/Town
....	....	....
....	....	....
....	....	....

7b. Have you changed the location of your DIY goods shopping in the last few years? Yes 1 /No

7c. If yes,tell me where you previously shopped for DIY goods

Name of shop	Area/Street	Village/Town
....	....	....
....	....	....
....	....	....

7d. And tell me the reasons why you changed location

....

....

8.How frequently do you go to Llanelli town centre? [Circle]

Daily	Several times a week	Weekly	Fortnightly	Monthly	Less frequently
1	2	3	4	5	6

8a.What is your main reason for visiting the town centre? [Circle]

1. shopping
2. work
3. entertainment
4. socialising
5. other

8b.If other, please specify

....

Indoor Market	5	4	3	2
Outdoor Market	5	4	3	2
Market St [Moonraker Club]	5	4	3	2
Co-op Living Store	5	4	3	2
Central Precinct [Mostly demolished]	5	4	3	2
Murray St[Road diverted]	5	4	3	2
John St [Estate Agents]	5	4	3	2

9a.Do you visit some streets more often than you used to? Yes/No [Circle] If so, why?

Area/street .... Reason ....

....

....

....

9b.Do you visit some streets less often than you used to? Yes/No [Circle] If so, why?

Area/street .... Reason ....

....

....

....

10.How frequently do you go to Carmarthen town centre ? [Circle]

Daily	Several times a week	Weekly	Fortnightly	Monthly	Less frequently
1	2	3	4	5	6

10a.What is your main reason for visiting the town centre? [Circle]

1. shopping
2. work
3. entertainment
4. socialising
5. other

10b.If other, please specify

....

11a.What is your main reason for visiting the town centre? [Circle]

1. shopping
2. work
3. entertainment
4. socialising
5. other

11b.If other, please specify

....

11c. Are you visiting Swansea as often as you used to a few years ago? [Circle]

1. more often 2. less often 3. same

11d. If more or less often,why?

....

....

12. A number of changes to the infrastructure and environment of Llanelli town centre have be since April 1992. In your opinion which of the following statements best describe the effect of [Circle]

a. on your the use of the town for shopping

1.I shop in the town less often
2.I shop in the town more often
3.The changes have made no difference to how often I shop

b.on your the use of the town for entertainment

1.I visit the town more often
2.The changes have made no difference to how often I visit the town
3.I visit the town less often

12a. If your use of the town has changed, what are the reasons?

....

....

13. Do you think that the opening of the Coastal Link Road through South Llanelli has helped r congestion in Llanelli town centre? [Circle]

Yes 1 No 2 Don't Know 0

	Strongly agree	Agree	No strong feelings	Disagree	Strongly disagree
Entertainment facilities have improved	5	4	3	2	1
The range of shops has worsened	5	4	3	2	1
The appearance of the streets has been improved	5	4	3	2	1
The streets feel less safe	5	4	3	2	1
Shopping is a more pleasant experience	5	4	3	2	1
Investment by the private sector has increased	5	4	3	2	1
Prices are lower than in other towns	5	4	3	2	1

16. To what extent do you agree with the following statements relating to car parking and bus s town centre? [Circle codes]

	Strongly agree	Agree	No strong feelings	Disagree	Stron disag
The multi storey car park over the market is no better than it was	5	4	3	2	1
The new Stepney Place car park has a pleasant appearance	5	4	3	2	1
The new Stepney Place car park is badly located	5	4	3	2	1
The car parks have helped attract more shoppers to the town	5	4	3	2	1
Despite the new car parking provision, car parking remains inadequate	5	4	3	2	1
The new bus stops are well located	5	4	3	2	1
The new bus stops are badly designed	5	4	3	2	1

Range of shops	4	3	2	1
Variety stores eg M&S	4	3	2	1
Price of goods	4	3	2	1
Restaurants and cafes	4	3	2	1
Indoor market	4	3	2	1
Outdoor market	4	3	2	1
Foodstores	4	3	2	1
Street events	4	3	2	1
Range of entertainment facilities	4	3	2	1
Banks and Building Societies	4	3	2	1

Direction signs	4	3	2	1
Car parking	4	3	2	1
Ease of access by public transport	4	3	2	1
Ease of access by car	4	3	2	1
Extent of pedestrian areas	4	3	2	1
Toilet facilities	4	3	2	1
Facilities for children	4	3	2	1

Street cleaning	4	3	2	1
Lighting	4	3	2	1
Attractiveness of shopping environment	4	3	2	1
Condition of buildings	4	3	2	1
Crime prevention measures	4	3	2	1
Feeling of safety	4	3	2	1
Town centre management	4	3	2	1

investments in terms of their benefits to shoppers in the town centre? [Circle]

1. environmental works	1	2	3	4	5	6	7	8	9
2. roads,car parks, bus stops	1	2	3	4	5	6	7	8	9
3. new shopping centre	1	2	3	4	5	6	7	8	9

20. Which of the following statements best describes your view of the future for Llanelli town ce

1. I think that the centre will continue to decline
2. The pace of decline has slowed but there is unlikely to be any lasting improvement
3. There is greater confidence in Llanelli town centre and the prospect of further improvements

21.In what ways do you think that Llanelli town centre could be improved ?

....
....
....
....

22. Do you shop at least twice a year in any of the following towns? [Circle]

1. Aberafan/Port Talbot	**1 Yes**	**0 No**	**If yes go to Q 23**
2. Cardiff	**1 Yes**	**0 No**	**If yes go to Q 24**
2. Carmarthen	**1 Yes**	**0 No**	**If yes go to Q 25.**
3. Neath	**1 Yes**	**0 No**	**If yes go to Q 26.**
4. Swansea	**1 Yes**	**0 No**	**If yes go to Q 27.**

23.In recent years has Llanelli town centre improved, declined, or remained the same relative to Talbot? [Circle]

Improved	Declined	Same	Don't Know
1	2	3	4

23a.Can you suggest any reasons for the relative improvement or decline?

....
....
....
....

24.In recent years has Llanelli town centre improved, declined, or remained the same relative to

Improved	Declined	Same	Don't Know
1	2	3	4

24a.Can you suggest any reasons for the relative improvement or decline?

....

....

....

....

24b.How does Llanelli town centre compare to Cardiff in relation to the following? [Circ

	Much Better	Better	Same	Worse	Much Worse	Don't Know
Range of shops	5	4	3	2	1	0
Price of goods	5	4	3	2	1	0
Shopping environment	5	4	3	2	1	0
Car parking	5	4	3	2	1	0
Ease of access by public transport	5	4	3	2	1	0
Ease of access by car	5	4	3	2	1	0
Range of entertainment facilities	5	4	3	2	1	0

25.In recent years has Llanelli town centre improved, declined, or remained the same relative t
[Circle]

Improved	Declined	Same	Don't Know
1	2	3	4

25a.Can you suggest any reasons for the relative improvement or decline?

....

....

....

....

Improved	Declined	Same	Don't Know
1	2	3	4

26a.Can you suggest any reasons for the relative improvement or decline?

....

....

....

....

26b.How does Llanelli town centre compare to Neath in relation to the following? [Circle code

	Much Better	Better	Same	Worse	Much Worse	Don' Know
Range of shops	5	4	3	2	1	0
Price of goods	5	4	3	2	1	0
Shopping environment	5	4	3	2	1	0
Car parking	5	4	3	2	1	0
Ease of access by public transport	5	4	3	2	1	0
Ease of access by car	5	4	3	2	1	0
Range of entertainment facilities	5	4	3	2	1	0

27.In recent years has Llanelli town centre improved, declined, or remained the same relative t
[Circle]

Improved	Declined	Same	Don't Know
1	2	3	4

27a.Can you suggest any reasons for the relative improvement or decline?

....

....

....

....

28. Do you or someone in your household own a car? Yes 1 No 2 [Circle]

29. What is or was the main occupation of the chief income earner in your household?

....

30. What are the ages of the people in your household? [Record numbers in each category]

	Under 16	16-18	18-59	60+
Numbers	....	....	....	....

31. What is the employment status of the people in your household? [Record numbers in each

	16-18	18-59	60+
Full time student			
Self employed			
Full time employment			
Part time employment [less than 30 hrs pw]			
On a training scheme			
Retired/pensioner			
Registered unemployed			
Long term sick or disabled			
Full time house duties			
Other			

Finally, the organisation I work for may wish to check that this interview has taken place. If you telephone may I take the number?

Tel. No. Code........................ No..

Thank you for your time.

....

....

Type of shop [business] [i.e.. goods sold]..

Name of Interviewee .... Date of interview....................

1. Are You? [Circle]

Owner	Tenant	Other
1	2	3

1a. If other , please specify ....

2. Age Group [guess] [Circle]

Under 30	30 - 44	45 - 59	60 +
1	2	3	4

3. Sex [Circle]

Male	Female
1	2

4. Did this shop [business] first open after April 1992? Yes 1 /No 2 [Circle]

4a. If yes, do you know why Llanelli was chosen?

....

....

5. What is the size of your shop [business]?

Gross area ....sq ft [................sq mts] Net sales area.................sq ft [................s

5a. Is your shop [business] the same size as it was in April 1992?

Same/Bigger/Smaller [Circle]

5b. If not please tell me what size it was in April 1992

Gross area ....sq ft [................sq mts] Net sales area.................sq ft [................s

7. **Has employment in your shop changed since February 1992? Has it: [Circle]**

1. Increased 2. Decreased 3. Remained the same

7a. **Do you know how many you employed in February 1997?......................**

7b. **Do you know how many you employed in February 1992?......................**

7c. **Since February 1992 has the total number of hours worked by employees per week: [Circ**

1. Increased 2. Decreased 3. Remained the same

7d. **Since February 1992 has part time employment: [Circle]**

1. Increased 2. Decreased 3. Remained the same

7e. **If employment has changed , why do you think this has happened?**

....

....

....

8. **A number of changes to the infrastructure and environment of Llanelli town centre have bee since April 1992. In your opinion which of the following statements best describe the effect of [Circle] [Alter start point]**

a. **on the use of the town centre as a whole**

1.The changes have resulted in fewer people shopping in Llanelli
2.The changes have resulted in more people shopping in Llanelli
3. The changes have made no difference to the number of people shopping in Llanelli

b. **on the use of your street/area**

1.The changes have resulted in fewer people shopping in my street/area
2.The changes have resulted in more people shopping in my street/area
3. The changes have made no difference to the number of people shopping in my street/area

The opening of the A484 Link Road from Trostre to the Loughor Bridge has:
1. resulted in Llanelli town centre loosing trade to Swansea.
2 resulted in Llanelli town centre gaining trade from Swansea
3. not affected trade in Llanelli town centre.
0. don't know

11.Within the last five years what national or local changes have been most beneficial to your

....
....
....
....
....
....
....

11a.Within the last five years what national or local changes have been least beneficial to your

....
....
....
....
....
....
....

11b.To what degree have the following changes been beneficial to your business? [Cir

	Significant benefit	Minor benefit	No effect/ neutral	Minor disbenefit	Sign disb
New paving & canopies in Vaughan St	5	4	3	2	1
New paving & canopies in Stepney St	5	4	3	2	1
New paving & canopies in Cowell St	5	4	3	2	1
New car park at Stepney Place	5	4	3	2	1
New bus bays at Stepney Place	5	4	3	2	1
Up-grade of the multi storey car park in Murray St	5	4	3	2	1
New developments on the Coast	5	4	3	2	1
Up-grade of Lucania buildings	5	4	3	2	1

Shopping is a more pleasant experience	5	4	3	2	1
Investment by the private sector has increased	5	4	3	2	1
Prices are lower than in other towns	5	4	3	2	1

13. To what extent do you agree with the following statements relating to car parking and bus town centre? [Circle codes]

	Strongly agree	Agree	No strong feelings	Disagree	Str disa
The multi storey car park over the market is no better than it was	5	4	3	2	1
The new Stepney Place car park has a pleasant appearance	5	4	3	2	1
The new Stepney Place car park is badly located	5	4	3	2	1
The car parks have helped attract more shoppers to the town	5	4	3	2	1
Despite the new car parking provision, car parking remains inadequate	5	4	3	2	1
The new bus stops are well located	5	4	3	2	1
The new bus stops are badly designed	5	4	3	2	1

14. The traffic circulation pattern around the town has been altered with the diversion of Murr the following statements best describes your view? [Circle]

a. **In relation to accessibility:**

The changes have made the town centre 1. more accessible 2. less accessible 3.made little differer

b. **In relation to traffic congestion:**

The changes have made the town centre 1. less congested 2. more congested 3. made little differer

....

15c. What were the reasons for this investment ?

....

....

....

15d. Did the changes to the infrastructure and environment of the town centre influence your in your business? [Circle]

1. Significantly 2. To a small degree 3. Not at all 0. Don't know/not applicable

15e. In principle would you be prepared to contribute to the cost of the following in the town future? [Circle]

1. Environmental improvements to the public realm	Yes 1/ No 2	Don't know 0
2. Improvements to accessibility and car parking	Yes 1/ No 2	Don't know 0
3. Town centre management revenue costs	Yes 1/ No 2	Don't know 0

16. Which of the following statements best describes your view of the decisions you made in employment in Llanelli town centre since April 1992? [Circle] [Alter start point]

1.The changes to the infrastructure and environment of the town centre created conditions which he more staff.

2.The changes to the infrastructure and environment of the town centre created conditions which he which otherwise would have been laid off.

3. The changes to the infrastructure and environment of the town centre made no difference to the n

4.The changes to the infrastructure and environment of the town centre created conditions which res reduce the number of staff.

Street events	4	3	2	1
Range of entertainment facilities	4	3	2	1
Banks and Building Societies	4	3	2	1

Direction signs	4	3	2	1
Car parking	4	3	2	1
Ease of access by public transport	4	3	2	1
Ease of access by car	4	3	2	1
Extent of pedestrian areas	4	3	2	1
Toilet facilities	4	3	2	1
Facilities for children	4	3	2	1

Street cleaning	4	3	2	1
Lighting	4	3	2	1
Attractiveness of shopping environment	4	3	2	1
Condition of buildings	4	3	2	1
Crime prevention measures	4	3	2	1
Feeling of safety	4	3	2	1
Town centre management	4	3	2	1

18. Could you please indicate in which of the following bands your turnover, including VAT, f annum lies? [Circle]

1. £0- 249k 2. £250-499k 3. £500- 999k 4.£1000- 5000k 5. ov

18a. How does your turnover compare in February 1997 in real terms to what it was in Februar [Circle]

Significantly higher	Higher	No Change	Lower	Significantly lower	Don't know
5	4	3	2	1	0

18b. Could you please estimate the percentage change of turnover in real terms............%

Stepney St [completed 1996]

20. How does your profitability compare in February 1997 in real terms to what it was in Febr

Significantly higher	Higher	No Change	Lower	Significantly Lower	Don't know
5	4	3	2	1	0

20a. Could you please estimate the percentage change of profitability in real terms ....%

20b. If your profitability has changed, why do you think this has happened?

....

....

....

21. By Christmas 1997 a new covered shopping centre will open in Llanelli town centre which ASDA foodstore with 450 car spaces and 25 other shops.

21a.Do you think the new centre will: 1. harm 2. benefit or 3. not affect your busine

21b. Why do you think that?

....

....

21c. Do you plan to stay in this property or move into the new centre? Stay 1 Move 2 Don

21d. What are your reasons?

....

....

22. On a scale of 1 to 10 [1 being least and 10 being most beneficial] how would you rank th investments in terms of their benefits to the trading performance of businesses in the town c have been completed?
[Circle codes]

1. environmental works	1	2	3	4	5	6	7	8	9
2. roads,car parks, bus stops	1	2	3	4	5	6	7	8	9
3. new shopping centre	1	2	3	4	5	6	7	8	9

a. Aberafan/Port Talbot	Yes 1	No 2
b. Cardiff	Yes 1	No 2
c. Carmarthen	Yes 1	No 2
d. Neath,or	Yes 1	No 2
e. Swansea?	Yes 1	No 2

If Yes go to relevant questions for each circled town below:

26.Since April 1992 has the turnover of this shop [business] increased, decreased or remained to your shop [business] in Aberafan/Port talbot

Increased	Decreased	Same	Don't Know
3	2	1	0

26a.Can you suggest any reasons for the relative increase or decrease?

....

....

....

....

27.Since April 1992 has the turnover of this shop [business] increased, decreased or remained to your shop [business] in Cardiff?

Increased	Decreased	Same	Don't Know
3	2	1	0

27a.Can you suggest any reasons for the relative increase or decrease?

....

....

....

....

28.Since April 1992 has the turnover of this shop [business] increased, decreased or remained to your shop [business] in Carmarthen?

Increased	Decreased	Same	Don't Know
3	2	1	0

....

....

....

....

30.Since April 1992 has the turnover of this shop[business] increased, decreased or remainec to your shop [business] in Swansea?

Increased	Decreased	Same	Don't Know
3	2	1	0

30a.Can you suggest any reasons for the relative increase or decrease?

....

....

....

....

Finally, the organisation I work for may wish to check that this interview has taken place. If yc telephone may I take the number?

Tel. No. Code........................ No..

Thank you for your time.

Appendix 4
Changes to town centre most and least beneficial to businesses

Changes to the town centre most beneficial to business within last five years

SN41: Profile- independent, 1300 sq ft, shop selling gifts and interior design accessories, Cowell Precinct

"If it was not for Llanelli's new development I would not have opened my business. Llanelli will not survive without it. So my answer would have to be the new development".

SN53: Profile- independent, 3300 sq ft, retail pharmacy, Cowell Street

"New road outside shop".

SN64: Profile- major comparison store, 16400 sq ft, multiple variety outlet, Vaughan Street

"Pedestrianisation, covered walkways, ambience improved- so much so that company refurbished store. Car parking good -cheap, free".

SN70: Profile- major comparison store, 1500 sq ft, shoe shop, Stepney Precinct

"Pedestrianisation, renovating buildings"

SN74: Profile- independent market trader, under 1000 sq ft, selling cooked meats, Indoor market

"General tidying up of the town centre, the investment and construction of the new shopping centre".

SN103: Profile- independent, 2000 sq ft, wine bar, near Stepney Arcade

"Redevelopment in Llanelli will be beneficial"

SN117: Profile- independent, 1700 sq ft, hairdresser, Murray Street

"New development will make business much more successful".

Changes to the town centre least beneficial to business within last five years

SN11: Profile- independent, 1700 sq ft, children's clothing, Cowell Street

"The disruption in the town centre, parking being a major problem."

SN14: Profile- major comparison store, 900 sq ft, electrical store, Stepney Street

"Development of the town centre - upheaval".

SN19: Profile- major comparison store, 3700 sq ft, fashion shop, Stepney Street

"The work carried out in Llanelli town centre has taken so long to complete. People are fed up with the mess, and in my opinion go to Swansea or Carmarthen where they also have a wider selection of shops".

SN25: Profile- independent, 1300 sq ft, pharmacy, Upper Park Street

"Messing people about with roadworks etc almost continual!".

SN26: Profile- major comparison store, 1900 sq ft, outdoor goods shop, Stepney Street

"Again the town development will pay off in the end, but we must suffer first. Trade has improved with works to Stepney Street but is nothing like it was before Tesco moved out".

SN28: Profile- independent, 500 sq ft, hardware and power tools shop, Market Precinct

"Constant upheaval of building or renovation has driven customers away from Llanelli".

SN29: Profile- independent, 700 sq ft, fabric shop, Indoor market

"Devastation caused by demolition work lasting over three years before start of development".

SN33: Profile- independent, 500 sq ft, menswear shop, Market precinct

"Town centre redevelopment scheme".

SN51: Profile- independent, 900 sq ft, bridal shop, Stepney Street

"The disruption of the building works".

SN52: Profile- independent, 1900 sq ft, pet shop, Cowell Street

"Digging up the road in front of shop October 1996 reduced trade by over 50% which still (March 1997) has not recovered!" .

SN61: Profile- independent, under 1000 sq ft, flower shop, Indoor market

"The work in town centre has affected trade".

SN71: Profile- independent, 1000 sq ft, ladies fashion, Stepney Precinct

"During the last five years the general disruption to the town centre (in all areas)".

SN74: Profile- independent, under 1000 sq ft, sells cooked meats, Indoor market

"The mess of the new construction (pavements etc), roads closed, car park re-vamp work carried out on market day (Thursday). Changes have put people off- until work is finished".

SN75: Profile- independent, under 1000 sq ft, sells cooked and fresh meat, dairy products, Indoor market

"The local building works being carried out in Stepney Street and Stepney Precinct and the multi storey car park".

SN86: Profile- independent, 1800 sq ft, electrical sales and repair shop, Station Road

"Redevelopment of Stepney Street and other areas, change to Murray Street prevents car stopping outside".

SN89: Profile- independent, 2300 sq ft, optician, John Street

"Also state of town centre gone downhill until new centre opened – disturbed by renovation".

SN91: Profile- independent, 600 sq ft, ladies-wear shop, John Street

"Disturbance from redevelopment puts people off from coming in".

SN96: Profile- independent, sells wall paper, paints, Cowell Street

"Town redevelopment chaotic for traffic".

SN105: Profile- independent, 2000 sq ft, grocers, Station Road

"Redevelopment".

SN106: Profile- independent, 700 sq ft, hairdresser, Stepney Arcade

"All restructuring"

SN115: Profile- independent, 1600 sq ft, optician, Station Road

"Devastation of Llanelli town centre"

SN119: Profile, 2000 sq ft, restaurant, Murray Street

"The up-heaval of all road works in town centre".

SN122: Profile-independent, 1700 sq ft, hairdresser, Murray Street

"Town development".

SN123: Profile- independent, 2100 sq ft, hair dresser, Murray Street

"All the roadworks in Murray Street when my customers had to climb over mud paths to get to me".

Appendix 5
Socio-economic characteristics of residents shopping in Llanelli and at competing locations

Location of households mainly shopping in specified locations

Residents' type of main shopping		n	Location of residents % of respondents		
			Burry Port	Llanelli	Llangennech
Grocery	Llanelli	21	14.3	61.9	23.8
	Swansea	6	16.7	33.3	50.0
	Trostre Park	178	30.9	39.3	29.8
	Carmarthen	4	75.0	0	25.0
	Elsewhere	87	31.0	40.2	28.7
Clothes	Llanelli	164	25.6	41.5	32.9
	Swansea	92	28.3	44.6	27.2
	Trostre Park	3	0	100.0	0
	Carmarthen	11	81.8	18.2	0
	Elsewhere	24	41.7	29.2	29.2
DIY	Llanelli	13	23.1	46.2	30.8
	Swansea	14	28.6	28.6	42.9
	Trostre Park	170	27.1	43.5	29.4
	Carmarthen	8	87.5	12.5	0
	Elsewhere	37	24.3	43.2	32.4
Furniture	Llanelli	66	37.9	43.9	18.2
	Swansea	52	38.5	32.7	28.8
	Trostre Park	29	20.7	44.8	34.5
	Carmarthen	4	50.0	25.0	25.0
	Elsewhere	79	13.9	49.4	36.7
Electrical	Llanelli	127	33.9	40.9	25.2
	Swansea	27	25.9	22.2	51.9
	Trostre Park	90	17.8	50.0	32.2
	Carmarthen	7	85.7	0	14.3
	Elsewhere	31	48.4	35.5	16.1

Source: 1997 Residents' survey

Age composition of households mainly shopping in specified locations

Residents' type of main shopping		n	Age composition % of respondents			
			Adult(s) + child(ren) under 16	All aged 16-59	Mix of under 60+ and over 60	Just 60+
Grocery	Llanelli	19	15.8	26.3	5.3	52.6
	Swansea	6	0	50.0	33.3	16.7
	Trostre Park	170	20.6	33.5	7.6	38.2
	Carmarthen	4	50.0	25.0	0	25.0
	Elsewhere	81	13.6	23.5	9.9	53.1
Clothes	Llanelli	156	19.2	25.6	7.7	47.4
	Swansea	86	15.1	41.9	10.5	32.6
	Trostre Park	2	0	0	0	100.0
	Carmarthen	10	20.0	20.0	0	60.0
	Elsewhere	24	29.2	33.3	8.3	29.2
DIY	Llanelli	13	0	23.1	0	76.9
	Swansea	11	27.3	36.4	9.1	27.3
	Trostre Park	159	24.5	33.3	8.8	33.3
	Carmarthen	8	12.5	37.5	12.5	37.5
	Elsewhere	36	5.6	38.9	22.2	33.3
Furniture	Llanelli	63	14.3	27.0	15.9	42.9
	Swansea	49	28.6	40.8	4.1	26.5
	Trostre Park	27	22.2	29.6	11.1	37.0
	Carmarthen	4	50.0	50.0	0	0
	Elsewhere	73	19.2	39.7	11.0	30.1
Electrical	Llanelli	123	18.7	20.3	10.6	50.4
	Swansea	23	21.7	47.8	8.7	21.7
	Trostre Park	84	15.5	40.5	8.3	35.7
	Carmarthen	7	28.6	28.6	14.3	28.6
	Elsewhere	30	20.0	40.0	3.3	36.7

Source: 1997 Residents' survey

Age of principal shoppers mainly shopping in specified locations

Residents' type of main shopping		n	Age % of respondents			
			Under 30	30-44	45-59	60+
Grocery	Llanelli	21	4.8	14.3	33.3	47.6
	Swansea	6	0	16.7	50.0	33.3
	Trostre Park	178	10.1	23.6	27.0	39.3
	Carmarthen	4	0	25.0	50.0	25.0
	Elsewhere	85	9.4	16.5	23.5	50.6
Clothes	Llanelli	162	9.9	18.5	23.5	48.1
	Swansea	92	10.9	21.7	34.8	32.6
	Trostre Park	3	0	33.3	33.3	33.3
	Carmarthen	11	0	18.2	27.3	54.5
	Elsewhere	24	4.2	37.5	25.0	33.3
DIY	Llanelli	13	7.7	7.7	7.7	76.9
	Swansea	14	7.1	35.7	35.7	21.4
	Trostre Park	169	10.7	23.7	33.1	32.5
	Carmarthen	8	0	25.0	25.0	50.0
	Elsewhere	37	10.8	13.5	29.7	45.9
Furniture	Llanelli	65	6.2	13.8	29.2	50.8
	Swansea	52	19.2	28.8	30.8	21.2
	Trostre Park	29	17.2	24.1	24.1	34.5
	Carmarthen	4	0	100.0	0	0
	Elsewhere	79	6.3	21.5	36.7	35.4
Electrical	Llanelli	125	8.0	20.0	20.8	51.2
	Swansea	27	14.8	25.9	33.3	25.9
	Trostre Park	90	12.2	15.6	38.9	33.3
	Carmarthen	7	0	28.6	28.6	42.9
	Elsewhere	31	6.5	32.3	22.6	38.7

Source: 1997 Residents' survey

Car ownership of households mainly shopping in Llanelli town centre

Residents' type of main shopping		n	Car ownership % of respondents	
			Own car	No car
Grocery	Llanelli	20	70.0	30.0
	Swansea	6	100.0	0
	Trostre Park	173	89.0	11.0
	Carmarthen	4	100.0	0
	Elsewhere	85	61.2	38.8
Clothes	Llanelli	160	74.4	25.6
	Swansea	90	93.3	6.7
	Trostre Park	3	66.7	33.3
	Carmarthen	11	90.9	9.1
	Elsewhere	22	59.1	40.9
DIY	Llanelli	12	75.0	25.0
	Swansea	14	100.0	0
	Trostre Park	168	85.1	14.9
	Carmarthen	8	100.0	0
	Elsewhere	35	85.7	14.3
Furniture	Llanelli	66	86.4	13.6
	Swansea	50	100.0	0
	Trostre Park	27	70.4	29.6
	Carmarthen	4	100.0	0
	Elsewhere	78	88.5	11.5
Electrical	Llanelli	122	71.3	28.7
	Swansea	27	96.3	3.7
	Trostre Park	88	88.6	11.4
	Carmarthen	7	71.4	28.6
	Elsewhere	31	83.9	16.1

Source: 1997 Residents' survey

Employment status of households mainly shopping in specified locations

Residents' type of main shopping		n	Employment status % of respondents		
			Household with 1+ adult in work	Household with no adult in work	Retired /other
Grocery	Llanelli	19	42.1	5.3	52.6
	Swansea	6	66.7	16.7	16.7
	Trostre Park	173	59.5	2.9	37.6
	Carmarthen	4	50.0	0	50.0
	Elsewhere	81	32.1	13.6	54.3
Clothes	Llanelli	156	46.8	6.4	46.8
	Swansea	87	59.8	4.6	35.6
	Trostre Park	2	0	0	100.0
	Carmarthen	11	36.4	0	63.6
	Elsewhere	24	58.3	12.5	29.2
DIY	Llanelli	13	23.1	0	76.9
	Swansea	11	72.7	0	27.3
	Trostre Park	162	59.9	6.8	33.3
	Carmarthen	8	37.5	0	62.5
	Elsewhere	36	58.3	8.3	33.3
Furniture	Llanelli	63	52.4	1.6	46.0
	Swansea	50	68.0	6.0	26.0
	Trostre Park	27	55.6	7.4	37.0
	Carmarthen	4	75.0	25.0	0
	Elsewhere	76	59.2	7.9	32.9
Electrical	Llanelli	122	40.2	8.2	51.6
	Swansea	23	73.9	0	26.1
	Trostre Park	87	60.9	4.6	34.5
	Carmarthen	7	42.9	28.6	28.6
	Elsewhere	30	53.3	3.3	43.3

Source: 1997 Residents' survey

Size of household of households mainly shopping in specified locations

Residents' type of main shopping		n	Size of household (no. of people) % of respondents			
			1	2	3 or 4	5 or more
Grocery	Llanelli	20	45.0	30.0	20.0	5.0
	Swansea	6	0	50.0	50.0	0
	Trostre Park	176	14.8	44.9	33.0	7.4
	Carmarthen	4	0	50.0	25.0	25.0
	Elsewhere	86	27.9	44.2	23.3	4.7
Clothes	Llanelli	161	24.8	43.5	24.2	7.5
	Swansea	91	14.3	41.8	38.5	5.5
	Trostre Park	3	33.3	66.7	0	0
	Carmarthen	11	18.2	54.5	27.3	0
	Elsewhere	24	16.7	41.7	29.2	12.5
DIY	Llanelli	12	58.3	33.3	8.3	0
	Swansea	14	0	35.7	35.7	28.6
	Trostre Park	168	16.7	39.9	36.9	6.5
	Carmarthen	8	25.0	37.5	25.0	12.5
	Elsewhere	37	10.8	54.1	32.4	2.7
Furniture	Llanelli	64	21.9	39.1	37.5	1.6
	Swansea	51	2.0	51.0	37.3	9.8
	Trostre Park	29	24.1	37.9	31.0	6.9
	Carmarthen	4	25.0	25.0	0	50.0
	Elsewhere	79	11.4	48.1	34.2	6.3
Electrical	Llanelli	125	23.2	44.8	25.6	6.4
	Swansea	27	3.7	55.6	40.7	0
	Trostre Park	89	19.1	42.7	27.0	11.2
	Carmarthen	7	14.3	42.9	42.9	0
	Elsewhere	31	16.1	38.7	41.9	3.2

Source: 1997 Residents' survey

Social class of chief earner of households mainly shopping in specified locations

Residents' type of main shopping		n	Social class % of respondents			
			Social class 1-2	Social class3-5	Retired	Unemployed/ housewives/ students
Grocery	Llanelli	20	30.0	30.0	40.0	0
	Swansea	6	33.3	16.7	33.3	16.7
	Trostre Park	164	25.0	37.2	34.1	3.7
	Carmarthen	4	25.0	50.0	25.0	0
	Elsewhere	81	14.8	21.0	46.9	17.3
Clothes	Llanelli	154	22.1	29.2	39.6	9.1
	Swansea	85	22.4	36.5	36.5	4.7
	Trostre Park	3	0	66.7	33.3	0
	Carmarthen	11	36.4	27.3	36.4	0
	Elsewhere	20	30.0	30.0	30.0	10.0
DIY	Llanelli	13	15.4	15.4	69.2	0
	Swansea	13	53.8	30.8	15.4	0
	Trostre Park	160	23.1	37.5	30.0	9.4
	Carmarthen	8	50.0	25.0	25.0	0
	Elsewhere	32	25.0	25.0	37.5	12.5
Furniture	Llanelli	60	21.7	33.3	40.0	5.0
	Swansea	51	29.4	43.1	19.6	7.8
	Trostre Park	28	17.9	39.3	39.3	3.6
	Carmarthen	4	25.0	75.0	0	0
	Elsewhere	72	31.9	33.3	27.8	6.9
Electrical	Llanelli	119	17.6	24.4	47.1	10.9
	Swansea	23	43.5	39.1	17.4	0
	Trostre Park	83	21.7	38.6	34.9	4.8
	Carmarthen	7	28.6	28.6	14.3	28.6
	Elsewhere	30	36.7	33.3	26.7	3.3

Source: 1997 Residents' survey

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