

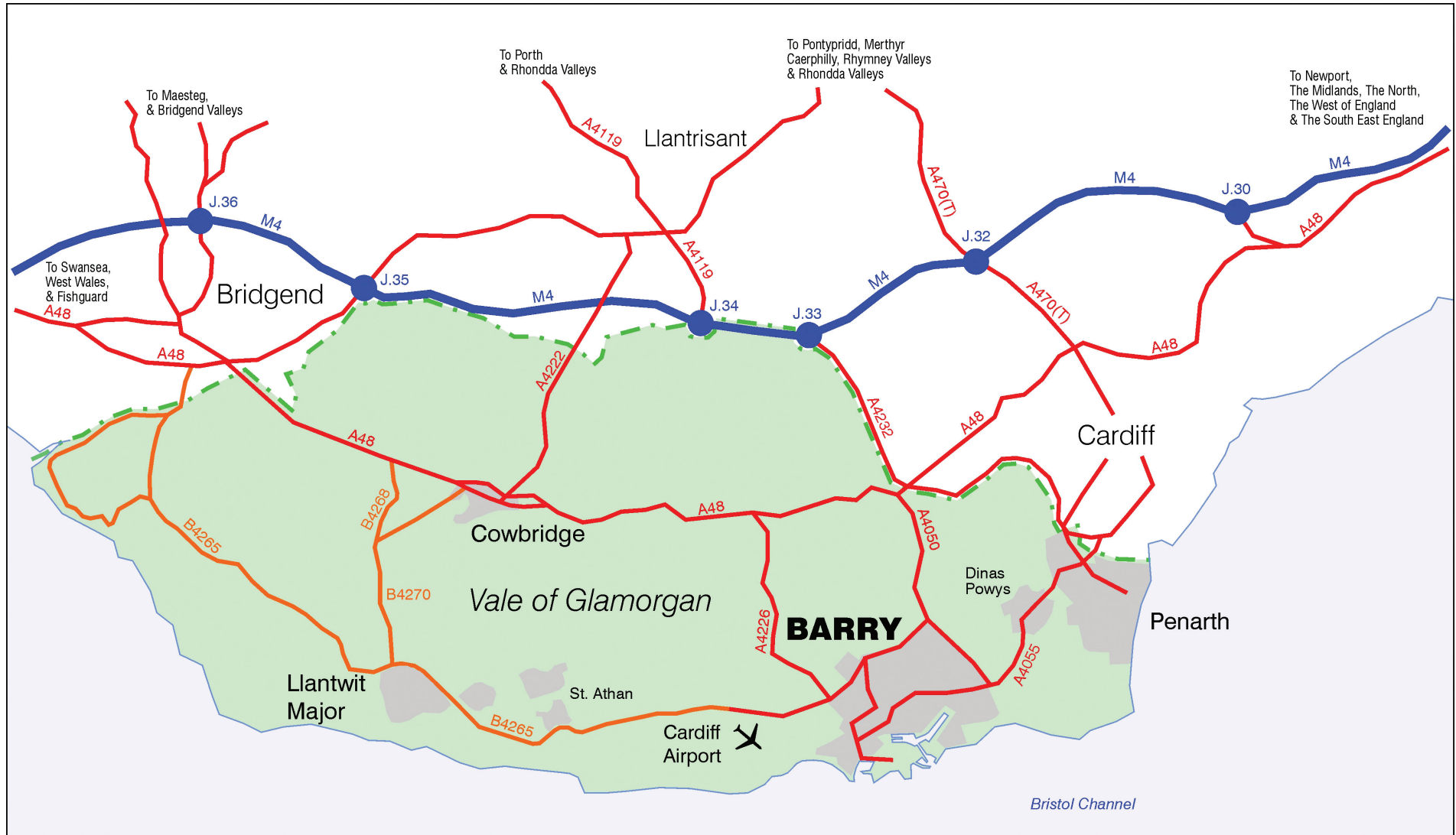
Investing in Barry



Now and in the Future



Location Map



Context

Barry is the largest town in Wales and the administrative centre of the Vale of Glamorgan, having developed rapidly in the late 19th and early 20th Century.

The Port of Barry was a key exporter of up to 11 million tonnes of coal in the early 20th Century with strong rail links to and from the South Wales Valleys. The town holds a deep rooted sense of loyalty and pride amongst its residents where generations of families settled in the late 19th Century.

A strong industrial and commercial past became the foundations for the town's modern existence. Barry has a number of key strengths and opportunities, including a scenic coastal setting, an operational seaport and an extensive dockland regeneration area situated between the town and Barry Island: a seaside resort with a quality blue flag beach. The town benefits from a railway running through its heart with four stations. It is home to a strong business sector and is in close proximity to Wales's Capital City and Cardiff Airport.

The recent designation of Barry as a Regeneration Area will give confidence to key partners and provide a focus for the securing of investment to deliver real economic and social benefits to the town.

Alongside these attributes and opportunities, Barry boasts strong academic achievements amongst a plethora of educational establishments including a bilingual secondary school and a College of Further Education steeped in history.



Barry is also becoming the town of choice for national film makers. *Casualty*, *Dr Who*, *The Sarah Jane Adventures*, *Gavin & Stacey* and *Being Human* have all been filmed in and around Barry.

The town's people have the luxury of living near country parks and a selection of beaches including the award winning Whitmore Bay on Barry Island. They have a choice of shopping centres from the main centre in Holton Road to the district centre of High Street in the west end of the town. The Vale of Glamorgan Heritage Coast is only a short drive away, as is the rich and diverse rural hinterland of the Vale of Glamorgan.



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Access

Barry town is easily accessible for those travelling from Newport, Cardiff and Swansea and further afield by road, rail and air. It is approximately 20 minutes drive from Junction 33 of the M4 (11 miles), and has the added benefit of being located less than five miles from Cardiff Airport (journey time approximately 12 minutes), which may be an important consideration for companies who have offices further afield.

Barry town is also well served by rail links and bus services for those who wish to use public transport to commute to work. There are excellent rail connections between Barry and Cardiff (four journeys per peak hour) and the reopening of the Vale of Glamorgan Line has resulted in the recommencement of services between Bridgend and Barry with services stopping at stations in Rhoose and Llantwit Major. Barry is in an enviable position, boasting four railway stations within the town which means that all areas of the town are easily accessible.



Population and Housing



The Office for National Statistics reported in 2009 that 124,600 people live in the Vale of Glamorgan. Almost 50,000 of this number are concentrated in Barry town. It is anticipated that the population of the Vale will increase by another circa *9,000 over the next decade. Once the town's population figure exceeds the 50,000 mark many multiple retailers and key inward investors will become further attracted to the town and consider it as a serious opportunity for further investment.

Recent new housing has been focused in Barry, Penarth and Rhoose and further new housing developments are planned within Barry and in adjoining Rhoose. The planned Waterfront Quays development aims to build a further 2000 new homes within the town. There are also opportunities at other sites for around 70 or so new homes and other smaller developments are also being progressed.



*(source: Statistical Directorate, Welsh Assembly Government).

Education

The Vale of Glamorgan has excellent schools. Secondary School Performance Tables produced by the Welsh Assembly Government indicate that in comparison to Wales as a whole, pupils in the Vale of Glamorgan achieve above average results in both GCSE and A-Level / AS equivalent or GNVQ equivalent examinations, as can be seen in the table below:

Pupils entered for GCSE's

	Vale of Glamorgan (%)	Wales (%)
At least one GCSE grade A* - G	94	92
At least five GCSE's grade A* - G	90	85
At least five GCSE's grade A* - C	58	49

In particular, the measurement of pupils who obtained GCSE maths and English qualifications in the Vale of Glamorgan compare very favourably to the rest of Wales with pupils in the Vale consistently achieving well above the Welsh average over the last four years in both English and Maths GCSE grades A* - C.

In addition, the Vale of Glamorgan's Average Wider Point Score at Key Stage 4 was the highest in Wales and as illustrated in the chart overleaf, the school performance and education attainment within the Vale of Glamorgan is in an enviable position when compared with the remainder of Wales.

The same level of performance applies at Advanced Level with 65% of pupils in the Vale attaining at least two grades A-C (or equivalent) compared with 61% across Wales.

A recent analysis of year 12/13 pupils in 2009 (a cohort of 708) demonstrated that 77.4% remained in full time education with the majority progressing to higher education, an increase on the previous year. 10.6% entered the labour market with the vast majority going into employment rather than training. Retail/sales accounted for over 40% of the employment opportunities taken up. (source: Careers Wales Cardiff & Vale).

This trend towards higher levels of academic attainment was also found to carry through to Higher Education, with almost 18,000 residents of the Vale having obtained a first degree or equivalent professional qualification (such as qualified medical doctor, dentist, teacher, etc).

In summary, school leavers in Barry and the Vale of Glamorgan are out performing their counterparts in other areas of Wales, providing employers with a well educated and balanced pool of potential future employees.

Barry and the Vale's Employment Base

Labour Market Profile

The latest labour market profile for the Vale of Glamorgan compiled by the Office for National Statistics (ONS) (July 2009 – June 2010) indicated that the economic activity rate, which comprises those who are in work or available for work, was 75.8%, some 3% above the average for Wales (72.8%).

In terms of occupation profile, the ONS indicated that 14.9% of Vale of Glamorgan residents were engaged in Associate Professional and Technical occupations, compared to 12.5% in Wales. The Vale of Glamorgan has a high incidence of personnel in managerial and administrative positions, thus skewing the employment profile of the South East Wales region towards the higher end of the occupational hierarchy. By way of example 18.5% are employed in managerial positions and 11.4% in secretarial and administrative roles.



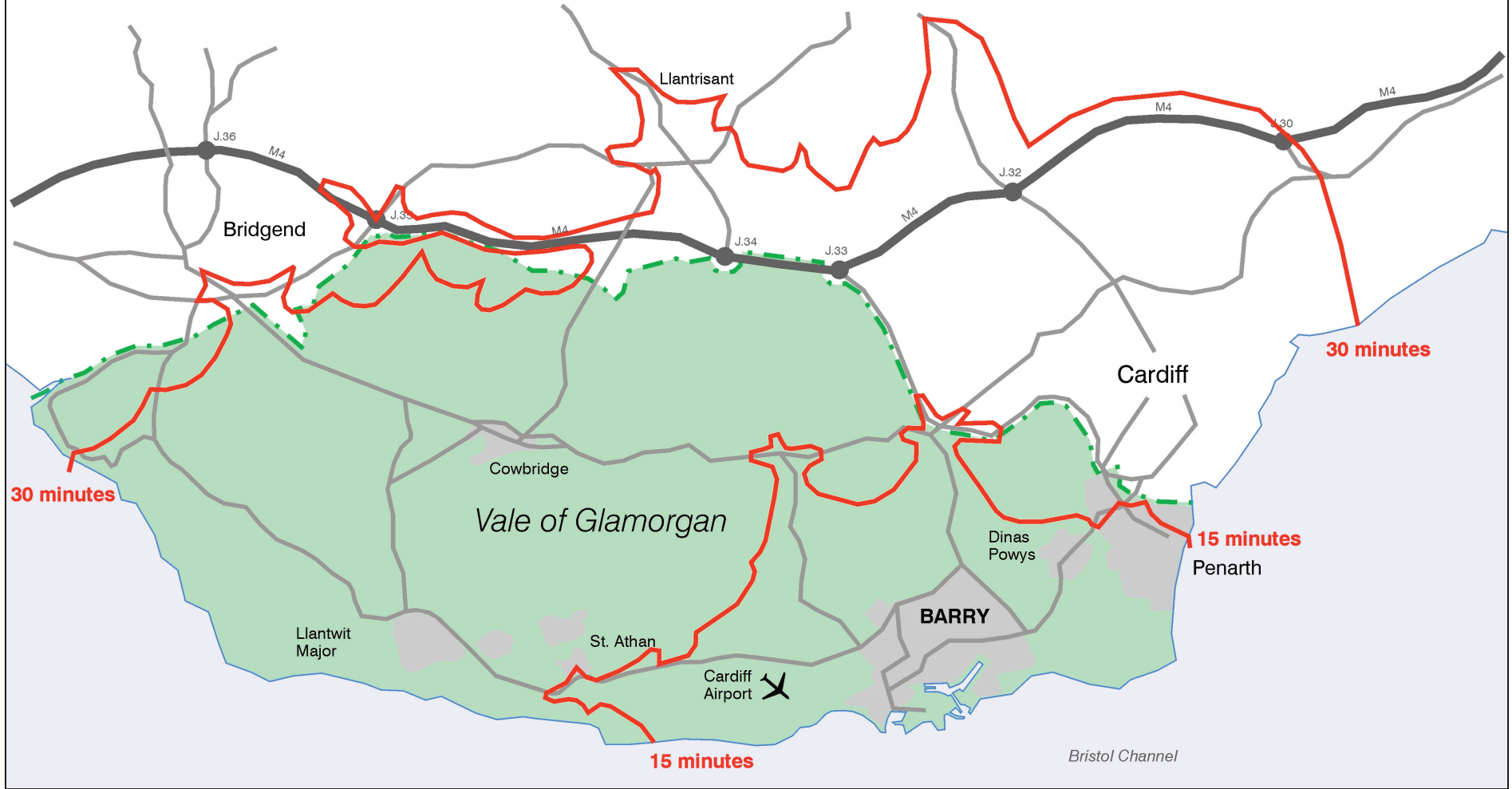
Commuter Patterns

The table below indicates that there is a far greater outflow of working population from the Vale of Glamorgan to its neighbouring areas, namely Bridgend, Rhondda Cynon Taf and Cardiff

Travel to Work – Migration of Population to and From the Vale of Glamorgan				
To	From	Totals	= Inflow/Outflow	
Vale of Glamorgan	Bridgend	1879	Greater Outflow	
Bridgend	Vale of Glamorgan	2224		
Vale of Glamorgan	Rhondda Cynon Taf	1377	Greater Outflow	
Rhondda Cynon Taf	Vale of Glamorgan	2627		
Vale of Glamorgan	Cardiff	4821	Greater Outflow	
Cardiff	Vale of Glamorgan	16656		

The data clearly illustrates an opportunity for future employers to capture and retain economically active people living in Barry and the Vale of Glamorgan, to work in the locality rather than commute to neighbouring areas. This is particularly relevant given that Barry is within easy reach of adjoining centres of population and labour supply, as demonstrated on this isochrone map.

Journey Times from Barry Town Centre



Its location and close proximity to Cardiff, excellent transport links with easy access to the M4 and Cardiff International Airport, together with good rail links place Barry and its surrounding environs in a prime position in the beautiful and prosperous Vale of Glamorgan. This offers huge potential for growth and investment.



Ongoing work for the Council's Local Development Plan identifies Barry as a key settlement of growth and development. This recognition is in line with the designation of Barry as a key settlement in the Wales Spatial Plan. As a consequence, Barry is seen as the focus for growth and development during the plan period (2011 – 2026).

The designation of Barry as a Regeneration Area by the Welsh Assembly Government in 2010 has been a significant boost, providing further investment in the town to build on regeneration work undertaken previously in partnership with the Welsh Assembly Government. The designation is bringing significant investment into Barry to deliver key environmental, economic and community

based projects. This is seen as a vote of confidence by the Welsh Assembly Government in the importance of regenerating the town, building upon recent progress in the town centre, King Square and surrounding environments. There has already been significant regeneration activity in the town driven by a variety of funding sources and this has been complemented by the development of further



strategic proposals. This work will be used as a foundation to develop a broader regeneration action plan for the town incorporating not only physical regeneration, but issues concerning housing, skills, inactivity and health through a balanced approach to people and place. Concentrated intervention in the form of a Regeneration Area offers a significant opportunity to realise the benefits of a more

strategic approach to regeneration in Barry. The town is now one of only seven designated Regeneration Areas in Wales. Current work includes public realm improvements to Thompson Street (adjacent to the main town centre). There is also the Castleland Housing Renewal Scheme (a town centre ward) undertaking regeneration works to many dwellings, thus improving the overall environment of the area and purposefully attracting young professionals to settle in the town.

A key strategic development opportunity involves the redevelopment of Barry Waterfront for approximately 2000 new homes, retailing and commercial development. Planning applications are currently being considered by the Council, not only for the redevelopment of the former Dock area but also to provide a direct road link to Barry Island. Other proposals involve the redevelopment of the former Barry Island Funfair site for a mixed scheme including indoor leisure facilities, whilst the Council is currently undertaking a master planning exercise to inform the future development options for the Island including land within the Council's ownership at Nells Point. This is in recognition of Barry Island as a key destination for visitors. Other important proposals involve the enhancement of the former Barry Dock Railway Station to provide park and ride together with a transport interchange.



There is no doubt that the designation of Barry as a Regeneration Area and the willingness of key players to submit development schemes for strategic proposals, at a time of economic downturn, cannot be understated and represents a confidence that Barry is a location open for business. The town is in a strong position and well placed to become one of the best places to invest in South Wales.

In addition to private sector interest and activity, the Council itself has been at the forefront of developing and delivering key improvements to facilities within the town. A recent flagship development involved the redevelopment of the old town hall to a state of the art central library and art space. As part of the regeneration of the Barry Waterfront, the Vale of Glamorgan Council in partnership with the Welsh Assembly Government has developed the Innovation Quarter which has recently seen the completion of the Business Support Centre (BSC), which is a circa £2 million project operated by the Vale of Glamorgan Council providing high quality office and workshop accommodation to fledgling businesses and entrepreneurs. The BSC has the added advantage of having in-house business support and advice provided through the Council's Economic Development Unit. Alongside the BSC, the Skills Training Centre is a circa £1.6million IT training centre operated for the Council by Barry College, combined with a circa £800,000 conservation workshop.



A new recently opened Primary Health Care Centre and Spine Road development of £6 million is located to the west of the BSC building. The restored Goods Shed and Conservation Workshops are let as a Railway Training School and Heritage Restoration Centre.



In addition, the Council is leading on the external restoration of the Grade II Listed Hydraulic Pumphouse which is currently underway with marketing for an end use to follow later in 2011.

Furthermore, the Council has a track record of delivering other initiatives and improvements. It recently completed the redevelopment of Cowbridge Secondary School and work on St Cyres Secondary School redevelopment is programmed as the next phase of its School Organisational Plan. Work is also underway to develop a new Welsh Medium Primary School in Barry.

The Council was also a key stakeholder in the successful bid to bring the Defence Technical College to St Athan and, although the training needs of the Ministry of Defence are currently being re-assessed by Central Government, the presence of a planning permission for a Defence Technical College cannot be underplayed and is a telling factor which may yet see a new College based at St Athan.

Cost Base for Inward Investment and Development in Barry

By way of example, it is anticipated that a purpose built, air conditioned building able to accommodate up to 1500 employees would cost in the region of £19.5m to build.

A comparison of rental rates in Barry and Cardiff demonstrates that rental rates per square foot in Barry for such a facility would be circa £16.50 per square foot (rent, rates and service charge inclusive). Cardiff's current rate is about £20+ per square foot.



There are three key sites or locations in Barry for potential inward investors to consider:-

- 1. Barry Waterfront**
- 2. Hayes Wood**
- 3. The Airport Business Park**

The general location of these sites are shown on the schematic map attached and full details of the sites can be provided upon request. Likewise any other potential locations within the town and surrounding area can be considered and discussed with the Council.



The Council is justifiably proud of its track record in regenerating Barry and is extremely confident of being able to build on recent success. Council officers are available to meet with any potential investor to discuss business requirements at any time.

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