Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr
BRIDGEND County Borough Council

Bridgend Replacement Local Development Plan 2018-2033

Background Paper 6: Retail

Table of Contents

BRIDGEND REPLACEMENT LOCAL DEVELOPMENT PLAN (LDP) 2018-2033

BACKGROUND PAPER 6: RETAIL

1. Purpose of the Report

1.1 This Report provides an overview of the refreshed retail evidence base used to justify the retail hierarchy, retail centre definitions, primary shopping area boundaries and associated policies contained within the Replacement Bridgend Local Development Plan (LDP) 2018-33. It also re-considers the capacity for comparison and convenience retail need over the plan period to ensure the Replacement LDP can respond accordingly. This report both synthesises and should be read in conjunction with the Retail Study (2018) and Retail Study Update (2022).

2. Introduction

2.1 In 2018, Bridgend County Borough Council (BCBC) commissioned Stantec to prepare a Retail Study to inform the Replacement LDP. The 2018 Study set out evidence-based recommendations on retail need, the distribution of need and the definition of primary shopping areas to inform emerging policies and site allocations over the 2018–2033 plan period. The Study also addressed relevant policy changes since the adoption of the existing LDP in 2013, particularly the implications of Planning Policy Wales (PPW) Edition 10 published in December 2018 (11th edition since published in February 2021), as well as TAN 4 Retail and Commercial Development (2016) and TAN 23 Economic Development (2014).

2.2 The 2018 Retail Study specifically sought to:

- Review the existing hierarchy and network of centres and make recommendations including identifying any deficiencies and potential for growth to meet identified needs where appropriate
- Make recommendations on the appropriateness of retail centre boundaries including primary shopping areas
- Recommend appropriate retail planning policies for the LDP review.

2.3 Following the impacts of the pandemic and other contextual changes since the 2018 Retail Study, BCBC re-commissioned Stantec to undertake a Retail Study Update (2022). This Update refreshes the retail evidence base and sets out evidence-based recommendations on retail need to inform the Replacement LDP. The Update specifically:

- Analyses trends affecting the retail sector which may impact and influence local retailing within the borough and documents how this may change over time
- Assesses future needs for comparison and convenience retail floorspace to 2033, based on existing market shares
- Reviews the methodology utilised in the original study to ensure it remains robust.

2.4 This Paper evaluates and draws conclusions from this refreshed evidence base to inform the retail hierarchy, retail centre definitions, primary shopping area boundaries and associated policies contained within the Replacement Bridgend Local Development Plan (LDP) 2018-33.

3. Existing Adopted LDP Policy

3.1 The existing LDP identifies town and district centres as the primary focus for retailing, culture and leisure activities. The existing LDP directs new development to these centres in accordance with their role based on a defined retail and commercial hierarchy. Policy SP10 defines the retail and commercial hierarchy at the county borough level, as summarised in Table 1.1.

Table 1.1. Bridgend LDP Retail Hierarchy

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

3.2 In terms of managing development within designed centres, existing Policy SP10 stipulates that new retail or other commercial development should provide active ground floor uses and be of a suitable scale for the centre within which it is located, having regard to its position in the retail hierarchy.

3.3 At the national level, PPW specifically provides guidance on retail and commercial development, whilst emphasising the importance of commercial centres for creating a sustainable strategic plan:

> Retail and commercial centres are hubs of social and economic activity and the focal point for a diverse range of services which support the needs of local communities. They are highly accessible to different modes of transport and are the most sustainable locations for new development (WG, 2021, para 4.3.1).

3.4 PPW states that planning authorities should establish a hierarchy of retail and commercial centres in their development plan strategy and identify boundaries for retail and commercial centres on the proposals map. Authorities should also consider making changes to retail and commercial centre boundaries where the right balance of uses is not being achieved or where the periphery of the centre is in decline and regeneration initiatives are unlikely to be successful.

3.5 PPW requires local authorities to identify which centres have primary and secondary shopping areas and define these on their proposals map. Changes to the acceptable uses in primary or secondary areas should be made where the ri ght balance of uses is not being achieved.

4. Role and Function of Designated Retail and Commercial Centres

4.1 This section provides a review of the role and function of designated centres in BCBC that make up the retail hierarchy. The analysis is informed by health checks of the sub-regional, town, district and local centres originally undertaken by Stantec and BCBC in January 2019, later refreshed by BCBC in 2022.

<u>Bridgend Sub-Regional Centre</u>

4.2 Bridgend is centrally located within the county borough and is the only centre with a sub-regional function. This fits within a wider regional hierarchy which has Cardiff and Swansea as the highest order centres.

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

4.4 The centre provides a good range of retail shops and complementary services. The food and drink offer comprise mostly independent cafes, restaurants, public houses and takeaways with a few national operators (Costa and Domino's

Pizza). Other leisure uses in the centre include gyms, an amusement arcade and nightclubs. However, there are some gaps in the leisure offer; the nearest multiplex cinema is the Odeon next to the McArthurGlen Designer Outlet, Bridgend.

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

4.6 Table 1.2 summarises the diversity of uses in Bridgend centre and the UK average. The proportion of units occupied by comparison and convenience shops combined in Bridgend is just 25% compared to a national average of 36.3% for centres across the UK.

Table 1.2 Diversity of uses in Bridgend

Category	No. Units **2022 Survey**	% Units **2022 Survey**	% UK Average (units) **2022**	Floorspace (sqm) **2022 Survey**	Floorspace (%) **2022 Survey**	% UK Average Floorspace **2022**
Convenience	15	4%	9.3%	12,284	9%	15.5%
Comparison	79	21%	27%	17,774	12%	30.3%
Services	205	54%	49.5%	100,549	70%	39.8%
Vacant	78	21%	14%	12,210	9%	13.8%
Total	**377**			**142,817**		
Source: GOAD/BCBC						

4.7 Bridgend has around half the UK average level of convenience goods (4% of all units and 9% of overall floor space). This pattern is not consistent with the two defined town centres, Porthcawl and Maesteg, which show stronger correlations to the UK average. The perception of a limited convenience offer in Bridgend's centre is skewed by the large edge-of-centre Tesco excluded from the figures in Table 1.2.

4.8 There has been a large reduction in the number of comparison retail units in Bridgend since the previous 2012 Retail Study. The proportion of comparison units has reduced from 25% in 2012 to 21% in 2022. The proportion of comparison units in Bridgend is below the UK average of 27% and this is a common trend across most of the county borough's centres.

4.9 The proportion of service units in Bridgend has not changed notably since 2012. In 2022, services represent 54% of units and 70% of total floorspace in the centre. This exceeds the UK average figures of 49.5% of units and 39.8% of floorspace. The high proportion of services is also a common trend in the county borough's town centres where more than 50% of units are occupied by service retailers.

4.10 The number of vacant units in Bridgend has increased since the pandemic and is now at 21%, which is higher than in Maesteg (11%) and Porthcawl (8%) town centres, and above the national average (14%). However, these trends are not surprising and demonstrate capacity for the town centres to accommodate future growth over the plan period.

4.11 In terms of existing development opportunities, most allocated retail sites have now been fully or partially redeveloped except for the Embassy Cinema Site which has now been in long term use as a temporary carpark. It is not known whether this site will come forward for retail or complementary use in the near future, however, the site plays a strategic function within the centre as a car park within an accessible gateway location.

<u>Town Centres</u>

4.12 Aside from Bridgend, the main towns in BCBC comprise Maesteg and Porthcawl. Maesteg Town Centre is in the north of the county borough and lies approximately 13km north east of Bridgend. Porthcawl is located on the South Wales coastline and lies approximately 9km to the west of Bridgend.

4.13 Maesteg is the principal settlement of the Llynfi Valley and benefits from a direct train route to Bridgend rail station which connects it to the wider national rail network. Maesteg has been the focus of regeneration efforts evidenced in its recently improved bus station and outdoor markets.

4.14 Porthcawl has been the focus of long-established plans for tourism-led regeneration focused along the waterfront. Porthcawl benefits from primary road connections to the wider strategic road network (the M4).

4.15 Table 1.3 shows the diversity of uses in each town centre.

Table 1.3 Diversity of Uses in Town Centres (Units), 2022

Town Centre	Convenience		Comparison		Service		Vacant		Total
	No.	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**	
Maesteg	14	8	35	21	99	59	19	11	**167**
Porthcawl	16	8	55	27	116	57	17	8	**204**
UK Average	-	9.3	-	27	-	49.5	-	14	**-**
Source: GOAD/BCBC									

4.16 Maesteg and Porthcawl contain a similar mix of uses. The proportion of convenience units in both centres is just under the UK average figure. Both centres also have a higher percentage of services, and a lower percentage of comparison retailers than the UK average. This trend is also found in Bridgend town centre.

4.17 Despite the pandemic, Maesteg has experienced a reduction in vacancy rates since 2012. Between 2012 and 2022 the total number of vacant units decreased from 13 to 11. This improvement can be partially attributed to the regeneration of the town markets and bus station and an improvement in the comparison offer. There is potential to diversify the range of services and enhance the night-time economy in Maesteg by expanding the food and drink offer. As part of the research behind the Retail Study, Stantec identified that a national brewery has an existing requirement for premises in Maesteg.

4.18 Porthcawl has also experienced a moderate increase in its convenience (3 additional units) and service offer (3 additional units) since 2012. The proposed regeneration of Porthcawl waterfront and existing interest from retailers means there is an opportunity to secure further investment in public realm improvements in Porthcawl.

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

- The restoration of the Jennings Building in September 2017, which now includes three restaurants and 14 live/work units
- The Watersports Centre was approved August 2017 and has now been delivered. The centre offers surf hire and year-round classes with the award-winning Porthcawl Surf School, as well as stand-up paddle board training. This has provided a base for local water sports groups and

clubs, a café/bistro, an ice cream kiosk, and toilet facilities, showers, changing cubicles, a function room and more.

District Centres

4.20 Below the level of towns, the county borough has six smaller district centres: Aberkenfig, Kenfig Hill, Ogmore Vale, Pencoed, Pontycymer and Pyle. Table 1.4 below shows the diversity of uses in each district centre.

Table 1.4 Diversity of Uses in District Centres (Units), 2022

District Centre	Convenience		Comparison		Service		Vacant		Total
	No.	%	No.	%	No.	%	No.	%	
Aberkenfig	10	16	13	21	32	52	6	10	61
Kenfig Hill	3	7	8	19	27	64	4	10	42
Ogmore Vale	2	5	3	8	29	74	5	13	39
Pencoed	5	7	9	13	49	69	8	11	71
Pontycymer	3	6	7	15	28	58	10	21	48
Pyle	3	9	13	39	17	52	0	0	33
UK Average	-	9.3	-	27	-	49.5	-	14	-
Source: GOAD/BCBC									

4.21 Table 1.4 shows that the size of the county borough's district centres varies considerably ranging from 33 units in Pyle to 71 units in Pencoed. This reflects the varying role and function of these centres as well as other factors including: the proximity to other centres, visibility on main arterial routes, the level of residential population locally and limitations of the built environment due to the historic layout and configuration of the shop units.

4.22 District centres in the Ogmore and Garw Valleys (Ogmore Vale and Pontycymer) and Kenfig Hill have a relatively limited convenience offer with just over half the UK average level of convenience units. This reflects the relatively low population density in the Ogmore and Garw Valleys and the location of a large supermarket nearby.

4.23 Pontycymer appears to be heavily reliant on the Cooperative Food Store as its anchor store. Similarly, Ogmore Vale is dependent on a Nisa Convenience Store for the whole of its central offer. Kenfig Hill's level of convenience offer is likely affected by its proximity to the Asda supermarket located less than a mile away within Pyle District Centre.

4.24 Most other centres are at or just below the UK average proportion of convenience retailers and appear relatively healthy. Aberkenfig stands out, with nearly twice the proportion of convenience retailers compared to the national average due to the concentration of national multiple convenience retailers to the west of the main high street. This is partly because of its strategic location at the edge of Bridgend which makes the centre accessible to the wider network via the M4, A4063, A4063 and A4046. Pencoed also has a strong national multiple presence, with Cooperative Food and Tesco Express stores both located within the centre. Pyle's centre is comparatively small, however has a large proportion of convenience floor space due to the presence of a large Asda Supermarket at its core.

4.25 The comparison offer across district centres is mostly lower than the UK average of 27%, although this is generally counterbalanced by the proportion of the service offer. Pyle is a notable exception, with 39% of the units being comparison.

4.26 The Garw Valley's (Pontycymer) district centre is noticeably struggling, with high vacancy rates above the national average. This equates to around one in five retail units being vacant. The level of vacant buildings has a noticeable effect on these centres, which was identified in the health checks. Other centres perform above the national average, with vacancy rates as low as 0% at Pyle.

4.27 Many of the centres suffer from the breaking up of retail areas, which leads to the lack of a distinct feeling of central space. This is most noticeably the case in Pontycymer and Ogmore Vale, where some vacant units have begun to fall into disrepair. However, also noticeable in Aberkenfig and Kenfig Hill where there are large breaks in retail areas as a result of intermittent groupings of residential uses along main high streets.

4.28 Development opportunities within the district centres are generally more limited due to their proximity to established residential areas. Most opportunities are for the redevelopment of areas within the centre rather than potential expansion. Due to the lack of interest in some centres there is likely to be further contraction to avoid the possibility of long term-vacant units. In such instances there may be the opportunity to redevelop flexible mixed-use or residential units which would still allow for future retail conversion.

<u>Local Centres</u>

4.29 BCBC prepared health checks to assess how the 17 local centres perform in terms of meeting the day-to-day shopping and service needs of local communities. Each centre was classified as either being in good health, as underperforming with some opportunities for further improvement or as being in poor health with more urgent need for improvement.

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

Health Check Assessments

4.31 Table 1.5 summarises the key findings of the health check assessments (updated 2022) for designated centres in BCBC and identifies key opportunities for change in each centre.

Table 1.5 Summary of Centre Health Checks and Opportunities

Centre	Health check recommendation	Opportunities for change
Bridgend	Good health	Consolidate retail uses along primary frontages to improve environmental quality and footfall. Redevelop prominent vacant buildings (incl. the former York Café Bar on York Street / Wyndham Street). Expand the range of leisure uses to enhance the evening economy.
Maesteg	Good health	Provide additional leisure uses to enhance the evening economy.
Porthcawl	Good health	Improve pedestrian connectivity between New Road and John Street. Improve visitor facilities to attract increased tourist spending in the town centre.
Aberkenfig	Good health	Provide additional pedestrian crossing points and signage to improve pedestrian linkages to Pentre Felin Retail Park and nearby open green space.
Kenfig Hill	Good health	Provide additional crossing points along Commercial Street to improve pedestrian linkages to Pisgah Car Park and nearby open green space.
Ogmore Vale	Underperforming	Redevelop vacant units/sites in the centre for retail or alternative uses. Improve visitor facilities to increase tourist spend in the centre.

Pencoed	Good health	Improve step free access for wheelchair and pushchair users.
Pontycymer	Underperforming	Units available along main high street frontages. Redevelop vacant units along Oxford Street for retail or alternative uses.
Pyle	Good health	Improve pedestrian links to Asda from Ffald road. Increase the number of convenience stores to improve the diversity of the convenience offer.
Bettws North	Good health	Improve pedestrian crossing points on Y Wern to improve access from playground
Bettws South	Underperforming	Visual improvement of existing units
Blackmill	Good health	Environmental improvements to soften vehicular dominance Strengthen links to cycle routes and footpaths
Blaengarw	Poor health	Improve facilities to take advantage of growth in tourism sector
Brackla	Good health	Improve public realm, including amount of seating
Broadlands	Good health	Environmental improvements to increase the amount of seating
Bryntirion	Good health	Improve shop frontages
Caerau	Underperforming	Improve visitor facilities to take advantage of tourism proposals nearby.
Laleston	Good health	Improve pedestrian connectivity
Nantymoel	Good health	Improve visual appearance of units to benefit from tourism proposals in wider area
North Cornelly	Good health	Strengthen connectivity to train station
Nottage	Good health	Environmental improvements to the recreation space and aesthetic improvement to shop units
Pont Rhyd y Cyf	Good health	Village Hall development complements units / tourism

Sarn	Good health	Visually improve shop units to potentially include landscaping of grass verges
Verlands Court (Pencoed)	Good health	Planting scheme to break up urban form and visual improvements to buildings
Wildmill	Good health	Strengthen connectivity to rail station
Five Bells Road (Bridgend)	Good health	Environmental improvements to grass verge

4.32 The opportunities within existing centres are primarily focused on condensing or redeveloping existing retail building stock to regenerate or improve retail environments and increase connectivity through active travel measures.

5. Retail Boundaries and Primary Shopping Areas

5.1 As part of the health check exercise, the adopted boundaries for all designated centres were reviewed against the existing distribution of uses.

5.2 In Bridgend, the Retail Study recommends that the primary shopping area is extended to include the Bridgend Shopping Centre, which has been redeveloped since 2012. It also recommends re-designating the adopted primary shopping area along Nolton Street and Wyndham Street as a secondary shopping area to reflect the current distribution of uses, which features a limited A1 retail offer and predominance of retail services. This will help to address long-term vacancy rates within the town centre and enhance a central feeling of place.

5.3 There is also the potential to consider greater flexibility outside of primary and secondary shopping areas at the periphery of the existing centre, where A1, A2 and A3 uses are unlikely to be forthcoming due to the form of existing building stock. Specific opportunities exist at Station Hill which benefits from close proximity to the railway station and may be more suitable for employment uses subject to residential amenity.

5.4 The Retail Study recommends condensing the primary shopping area in Maesteg to reflect the current distribution of uses. Specifically, the primary shopping area along Commercial Street should be re-designated as a secondary shopping area.

5.5 No changes are proposed to the primary shopping area in Porthcawl. Secondary Shopping Areas should be designated on the Esplanade, Lias Road, John St and New Road. Opportunities will be sought to improve the connectivity between John Street and New Road.

5.6 The study has identified that frontages on the periphery of Kenfig Hill, Ogmore Vale and Pontycymer district centre all show signs of decline. However, it is not recommended to remove these frontages from the boundary since they still contain a high proportion of units in commercial use at present. Instead, BCBC will monitor the health of these frontages closely over the plan period and will consider changing the boundaries if they experience further decline.

5.7 In summary, the Retail Study recommends that all existing retail centre boundaries are taken forward into the Replacement LDP. Changes to primary and secondary shopping area boundaries have been tested and consulted upon at Deposit Stage and no adverse comments were received. Clear policy expectations about the type of uses acceptable in such locations have now been set out in the Replacement LDP (refer to SP12 and ENT6-9).

6. Retail Need

2018 Retail Study Position

6.1 The 2018 Retail Study calculated comparison and convenience retail needs based on the constant market shares approach, which assumes that existing shopping patterns will remain stable over the LDP period (2018 – 2033). The Study identified limited quantitative needs across the County Borough, with qualitative retail needs in Bridgend (to improve comparison fashion, leisure and the general shopping environment) and Porthcawl (to improve main food shopping offer). This reflects market trends which are likely to influence demand for new retail and commercial leisure floorspace across the LDP period including the following:

- Polarisation to higher-order centres - National comparison retailers are increasingly rationalising their property portfolios with fewer large stores concentrated in in shopping malls and regional centres.

- Restructuring of the convenience sector - Major retailers have increased their network of small in-centre stores and invested in online shopping while discount food operators such as Aldi and Lidl have increased their market share.

- Growth of commercial leisure sector - Commercial leisure uses constitute a growing share of town centre floorspace driven in part by the increase in household leisure expenditure and reduced demand for retail space.

- Effects of digital technology - Digital technologies facilitating online sales have altered the ways in which retailers operate physical floorspace.

6.2 As existing town centres, Bridgend and Porthcawl represent the most sustainable locations for new retail development from both an environmental and social perspective. The Replacement LDP seeks to encourage retail proposals in town centres that are well served by existing public transport networks as they are best placed to serve residents (including those without access to a car). This strategy has clear social and environmental benefits in terms of reducing car dependency and making use of existing infrastructure. PPW acknowledges town centres as the best location for retail and leisure uses and the Replacement LDP seeks to promote the ‘town centre first’ principle.

6.3 In terms of form and scale, the 2018 Retail Study confirmed that the regeneration site designations in Bridgend (as indicated in the existing LDP) provide sufficient capacity to meet long-term comparison needs (9,890 sqm net). The Study also confirmed that long-term convenience needs (810 sqm net) could be delivered early in the plan period to provide a new main food shopping facility in Porthcawl to meet evidenced qualitative needs. The forecasts that informed the assessment of need included:

- Retail Spending Growth – Experian forecasted comparison spending would grow on average by 3.4% per annum between 2018 and 2033. Convenience spending is expected to grow extremely modestly over the study period by 0.2% per annum.
- Growth in e-commerce – Experian forecasted that growth in non-store retailing would exceed traditional retailing. The internet’s share of total retail sales is forecasted to increase from 12.1% to 17.3% between 2018 and 2033. Internet sales growth will be sustained by the increasing uptake of new technologies, such as purchasing through mobile devices.

6.4 Prior to Deposit Stage, it was determined that an allocation for a foodstore in Porthcawl would help improve the economic performance of the town. This was based on alleviating the current lack of convenience goods provision, reducing convenience expenditure leakage outside the town and increasing consumer choice. In addition, retail proposals were incorporated as part of the regeneration of existing sites within Bridgend. This was considered important to consolidate the comparison-shopping offer in the town, introduce complementary uses to increase footfall/expenditure and reduce comparison expenditure leakage outside of the County Borough.

6.5 Since publication of the Deposit Plan, the Bridgend Masterplan has been subject to public consultation and is being finalised. This provides an update to the sites that should be the focus of regeneration efforts over the Plan period. The mixed-use regeneration of Southside is one of the projects in the Bridgend Masterplan, which together account for the provision of 23,000m² of reconfigured, refurbished and new retail and food & drink proposals. This includes 21,000m² of ‘reconfigured’ and refurbished existing space at:

- Bridgend Shopping Centre (9,990m²)
- The Rhiw (9,272m²)
- Wyndham St (1,500m²)
- Queen St (170m²)
- Cambrian House (430m²)
- Bridgend Station redevelopment (1,810m²)

6.6 These are complemented by other mixed-use regeneration proposals to stimulate footfall in the town centre, improve existing buildings and the redevelopment of underutilised sites. Alongside this the masterplan identifies town centre wide environmental improvements including green and blue infrastructure improvements, active travel links, new public spaces to facilitate social distancing, tree planting, heritage trails and building character and street art improvements.

2022 Retail Study Position

6.7 It is acknowledged that online sales have continued to rise, most retailers are building less retail floorspace, operators have found that less existing floorspace is required and existing floorspace is being converted into alternative uses. Whilst the 2018 Study did forecast such changes, the COVID-19 global pandemic has accelerated and will continue to accelerate these trends over the plan period.

6.8 Equally, the level of household growth proposed in the Replacement LDP is 7,575 dwellings over the plan period, an uplift of 1,905, or 33% over the 2018 principal projections. This degree of aspiration aligns with Bridgend being within a national growth area (refer to the Strategic Growth Options Background Paper) and such demographic changes need to be understood in terms of retail need.

6.9 Both factors warranted re-evaluation of the 2018 Retail Study to ensure the retail related evidence base was up to date prior to submission of the Replacement LDP. Therefore, a refreshed (2022) Retail Study Update was undertaken to re-examine retail need within the BCBC area. This Study analysed trends affecting the retail sector which may impact and influence local retailing within the county borough and how this may change over time. It also assessed future needs for comparison and convenience retail floorspace to 2033, based on existing market shares.

6.10 The 2022 Study updated a range of technical inputs to inform refreshed retail capacity forecasts. These included Experian's base level population (to form study zones), the Replacement LDP's growth strategy (to ensure conformity with population projections over the plan period) and new retail commitments (to update the retail capacity tables). This enabled an updated position to be provided on quantitative retail needs.

6.11 The 2022 Study now evidences capacity for 12,790 sq.m of additional comparison retail sales area floorspace over the whole plan period (up to 2033) of which there is medium-term capacity for 6,291 sq.m sales area (by 2028). The main reason for additional capacity in the comparison goods sector is higher population growth (an additional 12,709 persons) when compared with the 2018 position.

6.12 The Study recommends that the comparison need identified should be met within existing town centres in the first instance in accordance with Planning Policy Wales' 'Town Centre First' principle (see Planning Policy Wales Edition 11, para 4.3.13). This will help reduce car journeys, contribute to the co-location of facilities in existing retail and commercial centres and thereby enhance their vibrancy, attractiveness and viability. Accordingly, primary survey work was undertaken to identify the latest vacancy rates in all Town, District and Local Centres to complement the 2022 Study. The findings from this survey work are detailed in Table 1.6. below and this shows a collective total of 23,945.54 sq.m of vacant space within such centres, which would be more than capable of accommodating the 12,790 sq.m of additional comparison retail sales area floorspace identified.

Table 1.6. Vacancy Rates in Town, District and Local Centres, 2022

Town	Status	Number of Commercial Premises	Number of Vacant Units	Total Vacant SQM
Bridgend	Sub Regional Centre	377	78	12,210.34
Maesteg	Town Centre	168	19	3641.20
Porthcawl	Town Centre	204	17	3862
Aberkenfig (Valleys Gateway)	District Centre	61	6	557
Kenfig Hill	District Centre	42	4	284
Ogmore Vale	District Centre	39	5	406
Pencoed	District Centre	71	8	1123
Pontycymmer	District Centre	48	10	690

Town	Status	Number of Commercial Premises	Number of Vacant Units	Total Vacant SQM
Pyle	District Centre	33	0	0
Bettws North	Local Service Centre	6	1	142
Bettws South	Local Service Centre	6	1	39
Blackmill	Local Service Centre	5	0	0
Blaengarw	Local Service Centre	11	4	219
Brackla	Local Service Centre	24	0	0
Broadlands	Local Service Centre	15	1	104
Bryntirion	Local Service Centre	6	0	0
Caerau	Local Service Centre	18	3	618
Laleston	Local Service Centre	8	0	0
Nantymoel	Local Service Centre	15	1	50
North Cornelly	Local Service Centre	10	0	0
Nottage	Local Service Centre	6	0	0
Pontrhydycyff	Local Service Centre	4	0	0
Sarn	Local Service Centre	15	0	0
Verlands Court (Pencoed)	Local Service Centre	4	0	0
Wildmill	Local Service Centre	6	0	0
Five Bells Road (Bridgend)	Local Service Centre	12	0	0
	TOTAL	**1214**	**158**	**23,945.54**

6.13 Indeed, the 'Town Centre First' principle is at the heart of the Replacement LDP's Spatial Strategy, which seeks to channel growth to sustainable locations that are well connected to existing centres. This approach is considered most conducive to facilitating transit orientated development grounded in placemaking principles that conforms with the 20-minute neighbourhood concept[1]. The sites proposed for allocation are all located within close proximity to their respective centres, thereby ensuring key local amenities, services and facilities are accessible via sustainable means of travel. It is considered that channelling growth into these areas will induce a local multiplier effect to increase revenue for and therefore viability of local business and services. This will sustain economic development and incite job creation as the centres would increasingly be seen as attractive places for business to locate, given the growing employment base and availability of skilled labour. Refer also to the Spatial Strategy Options Background Paper and 20-Minute Neighbourhood Background Paper.

6.14 Conversely, the 2022 Study evidences less capacity in the convenience goods sector due to the Aldi foodstore commitment at land at Salt Lake, Porthcawl (Planning Application P/21/835/FUL refers). This leaves capacity for just 403 sq.m of additional convenience retail sales area floorspace over the whole plan period (up to 2033), of which, there is no capacity for additional convenience retail floorspace in the short and medium term. The 2022 Study concludes that the strategic sites offer the best opportunity to deliver the shortfall in convenience through local service centres. This will minimise the need to travel, reduce dependency on the private car and enable sustainable access to local convenience and community facilities. Table 1.7 overleaf outlines the commercial / retail space identified on the illustrative masterplans that were provided to inform and have been embedded into the Replacement LDP. Evidently, there is more than sufficient provision to accommodate the small quantum of additional convenience retail sales needed over the plan period.

[1] In the context of Bridgend County Borough, a 20-minute neighbourhood is defined as the ability to access services within a 20-minute period either by walking or cycling, with public transport provision also available as a fallback option to ensure there is a range of sustainable travel options available within each neighbourhood.

Table 1.7. Local Service Centres on Strategic Sites

Policy Number	Allocation	Commercial/Retail Space
SP2(1)	Porthcawl Waterfront	Salt Lake 1.40ha (Aldi) / Salt Lake 0.23ha (other commercial). Flexible ground floor area of 0.61ha, which could accommodate commercial and ancillary uses.
SP2(2)	Land South of Bridgend	0.13ha (Community Hub).
SP2(3)	Land West of Bridgend	No retail/commercial due to proximity of convenience shops at nearby Brynglas
SP2(4)	Land East of Pencoed	No retail/commercial identified.
SP2(5)	Land East of Pyle	1.4ha (Local Centre).

7. Summary

7.1 The health checks have shown that most of the designated retail and commercial centres within the retail hierarchy continue to fulfil their role in terms of meeting the needs of local communities and no changes are proposed to the existing network. The following retail hierarchy will therefore continue to be the focus of new retail, commercial, leisure and appropriate employment development within the replacement LDP:

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

7.2 All existing retail centre boundaries are taken forward into the Replacement LDP. Changes to primary and secondary shopping area boundaries will be tested and consulted upon through the LDP Review. Clear policy expectations about the type of uses acceptable in such locations have been incorporated within policies in the Replacement LDP, and reflect the need to provide greater flexibility, increase footfall and promote a greater range of suitable town centre uses.

7.3 The retail need identified will be met by allocating regeneration sites in or adjacent to Bridgend and Porthcawl Town Centres, the re-use and regeneration of vacant units within commercial centres and via local service centres on new strategic sites. This will be complemented by policies in the Replacement LDP which clearly highlight the circumstances where new retail developments will be acceptable outside the centres in the hierarchy. i.e. where they can demonstrate they will complement existing facilities and can be accessed by sustainable forms of transport.