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

FINAL DRAFT



BRIDGEND TOWN CENTRE

TECHNICAL APPENDICES

FEBRUARY 2011

DTZ WSP powelldobson URBANISTS

This document has been prepared by:

DTZ & powelldobson URBANISTS & WSP

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Document assembled by:

Lauren Brown: Urban Designer
Powell Dobson Urbanists
Charterhouse
Links Business Park
St Mellons
Cardiff
CF3 0LT

All plans within this document are orientated due north.

This document is to be printed at A3 size, doubled sided.

APPENDIX 01:
POLICY REVIEW & HEALTHCHECK

APPENDIX 02:
MARKET REVIEW

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POLICY REVIEW & HEALTHCHECK

Bridgend Town Centre Masterplan

Appendix 1:

Policy Review & DTZ Healthcheck Assessment

<u>FINAL DRAFT</u>

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APPENDIX

01

POLICY REVIEW & HEALTHCHECK

1. Introduction

This Appendix to the Masterplan sets out a review of key policy documents including:

- The Wales Spatial Plan
- Bridgend UDP
- Bridgend Community Strategy
- Sustainable Economic Regeneration Strategy
- Bridgend Town Centre Vision Retail Vision
- Bridgend Employment Land Review
- ERDF Convergence Programme
- Life Centre Study – Bridgend (2003)

A summary of the key implications for the town centre together with a healthcheck is also provided.

2. Wales Spatial Plan

The Wales Spatial Plan – People, Places, Futures – was originally adopted by the National Assembly for Wales in November 2004. In 2008 it was updated to bring the Wales Spatial Plan into line with *One Wales*, and gives status to the Area work which has developed over the last two years. The Vision of the document is:

'We will sustain our communities by tackling the challenges presented by population and economic change. We will grow in ways which will increase Wales' competitiveness while assisting less well-off areas to catch up on general prosperity levels and reducing negative environmental impacts. We will enhance the natural and built environment and we will sustain our distinctive identity.'

2.1 South East Wales Spatial Area

The Vision for the South East Spatial Plan Area is as follows:

'An innovative skilled Area offering a high quality of life – international yet distinctively Welsh. It will compete internationally by increasing its global visibility through stronger links between the Valleys and the coast and with the UK and the rest of Europe, helping to spread prosperity within the Area and benefiting other parts of Wales.'

Key elements in realising the vision for South East Wales are:

- The area will function as a networked city region, on a scale to realise its international potential, its national role and to reduce inequalities.
- A fully integrated high quality transport system is necessary for this to happen. Over the 20 year horizon of the Wales Spatial Plan, all the Area's key settlements should be linked to Cardiff or Newport by suitable high capacity public transport.
- The success of the Area relies on Cardiff developing its capital functions, together with strong and distinctive roles of other towns and cities.

Within the Spatial Plan, Bridgend sits in the 'City Coastal Zone' of South East Wales. Bridgend is noted as being a 'cross boundary settlement' with linkages into the South West Wales Spatial area. It is also noted as a 'key settlement'. The key settlements must be successful in their own right and, where appropriate, function as service and employment hubs for smaller settlements. The focus will be to create affordable and attractive places to work, live and visit. The success of the key settlements should improve life in smaller rural and valleys communities, with good access to services being a key determinant of quality of life. Key settlements will provide the central framework around which high capacity sustainable transport links will be developed. A wider range of facilities and services, which add to employment opportunities, should be delivered locally within the key settlements to reduce the overall need to travel. Within the WSP one of the key themes is 'respecting distinctiveness' where it states that:

'Each town and city needs to foster its own distinct sense of identity, building on its heritage and culture to create a network of settlements with real character which complement each other and each add strength to the attractiveness of the region as a whole'.

3. Bridgend Unitary Development Plan & Emerging LDP

The Bridgend UDP currently provides the local planning policy context against which planning applications in the town centre are assessed. The UDP is the existing adopted development plan and the most relevant document in terms of considering planning application for development proposals. Bridgend Council is in the process of preparing the Local Development Plan (2006-2021) to replace the UDP.

3.1 Bridgend UDP Policies

3.1.1 Retail

Bridgend town centre is at the top of the County Borough retail hierarchy and is defined as a sub-regional town centre. Policy R1 states that new retail development should be concentrated in existing commercial centres. The UDP seeks to limit the spread of further new out-of-centre retail development and it also seeks to make existing commercial centres the primary focus for new retail development. The UDP identifies a number of key development sites, including:

- R8(1) THE SURFACE CAR PARK AND ADJOINING LAND NORTH OF BRACKLA STREET, BRIDGEND
- R8(2) ELDER YARD, BRIDGEND
- R8(3) THE RHIW CAR PARK AND ADJACENT GARAGE, BRIDGEND;
- R8(6) LAND NORTH OF MARKET STREET, BRIDGEND;
- R8(8) THE EMBASSY CINEMA SITE AND ADJACENT LAND AT BREWERY LANE AND TONDU ROAD, BRIDGEND

- R8(9) THE ALLOTMENT AND COUNCIL DEPOT AREA SOUTH OF BRACKLA STREET, BRIDGEND

It is hoped that the successful redevelopment of these sites will lead to an improved shopping environment and an extended retail offer. These sites are served by public transport and should therefore be accessible to all groups within the community. Policy R9 seeks to restrict out-of-centre retail development in favour of retail growth in town centres.

3.1.2 Tourism and Leisure

Policies seek to contribute to the key objectives of enhancing, improving and developing the tourist potential of the County Borough whilst protecting and conserving the environment. Policy TM1 states:

"New or extended tourist and leisure facilities and attractions will be permitted in urban areas where all of the following criteria are satisfied:-

1. *It will contribute to the regeneration of town centres by improving their vitality, viability and attractiveness to visitors, and enhance their leisure role in the evening economy and at weekends;*
2. *The development will be compatible with, and sympathetic to its surroundings in terms of siting, scale, design, external appearance, materials and landscaping;*
3. *The development is well located to public transport, the needs of the non car traveller, and the main road network, and would have satisfactory car parking;*
4. *The highway network is capable of accommodating the traffic generated by the development without an unacceptable effect on traffic flows and patterns, safety, energy use or other emissions.*
5. *The site is not within an area of flood risk".*

The sub-text to Policy TM1 confirms that the Council is particularly keen to increase the number of visitors to Bridgend town centre and to improve the tourism and leisure provision in and around Bridgend particularly with the increasing importance of shopping as a leisure and tourism activity. The implementation of pedestrianisation, in particular, should see a major improvement in the town centre's environment.

3.1.3 Employment

Policy E10 confirms that office uses should be directed to town centre locations:

"Existing town centres will be the main focus of office development. Elsewhere, office development will be permitted only if:-

1. *In sequential order of preference, all town centre, edge of centre and out of centre sites have been thoroughly assessed and none are found to be suitable.*
2. *The proposed development is well served in terms of public transport.*

In the context of the above, the following sites are allocated:-
E10(1) Former SWALEC depot, Tremains Road;
E10(2) Land south of Mackworth Street, Bridgend;
E10(3) Land at Coity Road, Bridgend; and
E10(4) Former Courage depot site, Tondu Road, Bridgend".

3.1.4 Pre-Deposit Local Development Plan (December 2008)

The LDP reaffirms that the town centre is currently failing but that there is potential for this trend to be reversed and new retail floorspace to be created in the town centre. The LDP is to be advanced following a 'regeneration led' growth strategy. A key aim of the strategy is to focus on the regeneration of Bridgend and its town centre. Paragraph 9.2.12 confirms that the Bridgend Regeneration Growth Area lies to the east of the town of Bridgend and comprises an arc of development opportunities and existing commitments starting to the south east of Junction 36 of the M4, skirting Bridgend Town Centre, and continuing to the A48 as it enters the Vale of Glamorgan.

4. Bridgend Community Strategy 2009-2012

The document has been prepared by Bridgend's Local Service Board in conjunction with residents and all the organisations that can play a part in making the vision of a bright future a reality. Its core aim is to make Bridgend County the best it can be for those who choose this as a place to live, work or visit.

It states that by working together we will realise the vision for Bridgend of:

"*A bright future that celebrates and builds on the successes of our past and present*"

This vision is looked at in more detail under the following headings.

- Strong Communities
- Young Voices
- Healthy Living
- New Opportunities
- Proud Past
- Green Spaces

5. *Fit for the Future* - Bridgend County Borough's Regeneration Strategy 2008-2021

In the spring of 2007, SQW Consulting, economic development consultants, were commissioned to develop *Fit for the Future*, the new regeneration strategy (the Strategy) and action plan for the Bridgend County Borough which will cover the period 2008 through to 2021. The Council, working in partnership with the Department for the Economy and Transport (DE&T) of the Welsh Assembly Government (WAG), and with comprehensive consultation of local businesses, agencies and people, has developed a new Vision for regeneration which is as follows:

"By 2021, Bridgend County Borough will be recognised as a self-contained, productive sub-regional economy, with a skilled and utilised workforce, in a place where people and businesses want to be".

Fit for the Future defines regeneration as an over-arching activity delivering a balanced approach to revitalising the well-being of communities through social, physical, and economic improvements. The *Fit for Future* strategy seeks to:

- Promote entrepreneurial and wealth-creating activities;
- Build on and integrate economic development and tourism, urban and rural physical regeneration, and health:
- Integrates with key values embedded in the Community Strategy.

Working alongside other major local strategies, including Bridgend CBC's Corporate Plan, the Economic Regeneration Strategy, the Health and Well-Being Strategy, and sub-regional plans for tourism, transport and rural development, *Fit for the Future* emphasises key actions to maximise opportunities for local people and businesses, and to attract new investment into Bridgend County Borough. The Strategic Aim's are as follows:

- **Strategic Aim 1: Enabling wealth and increasing enterprise**: Wealth creation will come from more, better and better-equipped businesses. Through improved understanding of global markets enabling local opportunities, and a drive to bring greater numbers of people into the labour market, we can ensure that public policy and its interventions support local businesses. The continued growth and modernisation of the economy is crucial to sustainable regeneration in Bridgend County Borough.

- **Strategic Aim 2: Building up skills levels and entrepreneurial attitudes in an active labour force**: Knowledge-based businesses are of growing importance in making economies competitive. We will need to promote, develop and grow existing and new skills capacity to achieve this. We need to strengthen links between local businesses and Higher Education facilities, supported by the development of entrepreneurial awareness from school age onwards.

- **Strategic Aim 3: Making a great place to live, work, visit and play**: Place-making is at the heart of current government policy, and the place of Bridgend County Borough is at the heart of the Regeneration Strategy. Bridgend County Borough's talents and offerings can often be lost amongst larger neighbours: it can be seen to be as at the fringe of the capital city, or Swansea Bay. The strategy needs to ensure that Bridgend County Borough has its own sense of place and identity.

- **Strategic Aim 4: Strengthening and renewing infrastructure**: Without 21st century infrastructure, we will struggle to develop the 21st century economy and place that we are striving for. Good communications, both physical and virtual, will underpin opportunities for businesses and people. Significant renewal is already underway or planned, in town centres, Porthcawl waterfront and in transport. There is a good supply of land and property, and of sites for industry and offices. We understand the need to exploit existing public sector assets where they are under-used or available for change of use, and to explore new models available to develop and promote new live/work spaces.

6. Bridgend Town Centre Retail Vision (CACI 2007/2010)

Currently Bridgend is ranked 233rd in the UK Retail Footprint rankings, this means that Bridgend is not a priority for major national multiple retailers due to the towns low market potential and low overall profile. Bridgend has a market share of 28.5%, as the major centre within its catchment it would be expected to have a higher market share. This low level of market share illustrates the high level of competition that exists within the region. Key competitors for retail market share are Cardiff and Bridgend Designer Outlet.

Bridgend is underperforming because it fails to meet the needs of its catchment. The current retail offer does not align well to the ACORN profile of Bridgend. The ACORN profile is biased towards:

- Wealthy Executives
- Flourishing Families
- Secure Families

The current retail offer in the town is focused on the value sector of the market, dominated by small sized retailers and independent retailers. The town lacks department stores, variety stores and major space users which are seen as key to a successful retail mix for a town of this size. Bridgend fails to provide a consistently strong offer across a wide range of retail categories and so is failing to meet the retail needs of its catchment population. A small increase in the mass-market portion of its retail footprint score would lead to Bridgend being classed as an Average Regional Town which would ultimately improve its Comparison Goods Market Potential and therefore its ranking.

Towns such as Bridgwater, Kettering, Kidderminster, Stockton-on-Tees, Wellingborough and Worksop were set as current benchmarks. Due to the limited amount of spend in the region and the strong levels of competition, Bridgend has little headroom for development-led retail growth. Aspirational benchmarks for Bridgend were set as Ashford, Taunton, Wrexham and Yeovil

The aspirational benchmarks provide a target for Bridgend in terms of market position, retail mix and target occupiers. By meeting these targets, Bridgend can improve its level of performance and obtain increased levels of market share and higher level of Comparison Goods Market Potential. The key development sites within the town centre were assessed by CACI as:

- Extension to the Rhiw Centre - The Rhiw Centre provides the most suitable location for development under the do maximum scenario. However, any development around the Rhiw Centre will need to be balanced by significant development elsewhere in the town in order to avoid polarisation around the Rhiw Centre.
- Elders Yard – a development at this site, in conjunction with an extension to the Rhiw Centre, would provide the best results in terms of turnover and balance offered to the town centre as a whole.

Retail Need

In relation to retail capacity, CACI was commissioned by the Council to carry out a retail capacity study for Bridgend (Retail Needs Planning Study 2007 – 2021). An addendum to this study was issued in June 2010 and concludes that:

Comparison	CACI conclude that if Bridgend is to fulfil its potential, headroom capacity exists for up to **14,024 sq m** of additional comparison floorspace up to 2021.

Bulky Goods	CACI conclude that there is very little headroom for any additional bulky goods space in Bridgend town. However, for the whole of the County Borough, there is capacity for **16,400 sq m** of additional floorspace up to 2021.
Convenience	CACI conclude that taking into account the increased competition in neighbouring areas, the strong offer in and around Bridgend and decline in balance of trade, brought about by new provision in the pipeline, there is no capacity for further provision up to 2021.

This information states that Bridgend town centre is not performing to its full potential and, like other similar sized towns centres in South Wales, has suffered from a relative under investment in new facilities, together with increased competition from out of centre retail developments and neighbouring city centres. It does however conclude that there is an evidence base for concentrating on clawing back retail expenditure and reducing leakage to neighbouring centres.

6.1 Bridgend Town Centre Regeneration Strategy

A study carried out in 1995 by Arup identified that there is potential to promote the regeneration of Bridgend town centre. A broad regeneration strategy was drawn up by Arup which embraced the development of new sites, proposals for the management of traffic, environmental improvements and a cultural approach. It was felt that the promotion of the centre requires a coordinated programme of public and private sector investment whose objectives are to:-

- Improve the town centre environment
- Sustain business confidence
- Attract new investment
- Redefine the town centre's image.

An implementation and funding plan was produced. The proposed development strategy for the town centre comprises the development of strategic sites, Elders Yard, Nolton Street area, British Telecom site, and Allotment Gardens. Other projects focus on cultural and environmental projects, including the creation of a pedestrian environment and the management of traffic. The development sites and proposed projects are detailed further under the relevant topic chapters particularly retailing, transportation and regeneration.

7. Bridgend Employment Land Review (2006 and 2010)

The 2006 document expanded on the Wyn Thomas Gordon Lewis (WTGL) Study in 2001 and reviewed current availability of land and premises; quality and age of stock; reviews sectors; and assesses supply / demand changes / influences vis-à-vis the level of provision over the specified local development plan period up to 2021. Of particular relevance to the Bridgend Masterplan:

- Offices: generally demand has exceeded supply of offices in most categories.
- In terms of the supply/demand equation for land, offices and industrial/warehouse space, the marketplace is such that demand is exceeding supply in almost all size categories.
- A contrast between this report and the WTGL report is that demand has improved significantly – leading to a marked additional supply of offices, limited additional supply of industrial space and no significant improvement in the availability of smaller parcels of land.

In 2010 the Council carried out an Employment Land Review of existing and proposed sites for employment purposes. This included an analysis of the current and future need for employment land and premises as indicated by property market professionals and developers as well as those responding to a survey of businesses. The report recommends an employment land portfolio totalling 154 hectares although this amount is subject to confirmation when more detailed consideration is given to employment land areas when allocating mixed-use schemes in the LDP. Whilst this is in excess of the identified need, it is crucial that the Council maintains a portfolio of sites which offer an element of choice and which are flexible in terms of their employment uses, in a variety of locations and capable of attracting investment. In addition a proactive policy-led approach in bringing forward employment land in the northern areas of the County Borough (made viable through mixed-use developments) will assist in bringing jobs to these areas in line with the strategic growth objectives of the LDP.

8. ERDF Convergence Programme

Bridgend sits within the West Wales and the Valleys area which is eligible for EU funding under the Convergence Programme. The overall aim of the convergence programme is to "Make West Wales and the Valleys a vibrant, entrepreneurial region at the cutting edge of sustainable development." Of particular relevance to the Bridgend Masterplan is Priority 5 – Building Sustainable Communities. Priority 5 recognises that the physical appearance of the built environment alongside the availability of amenities is a key factor in making places attractive to live and work.

Themes under this priority will focus on:

- Supporting physical regeneration, redeveloping derelict brownfield sites, regenerating degraded urban and rural landscapes, and improving the quality of public spaces; and
- Community economic development, improving access to and quality of services of a general economic interest in the most deprived communities.

The document identifies that part of WWV borders strongly performing urban areas (e.g. Cardiff). The programme recognises that strong performing city regions require the development of complementary centres that provide a range of employment, services and facilities set within a high quality environment that are accessible to all communities. Within the less densely populated areas, it is about having strong performing, accessible centres that have a range of functions. Many will be important regional and local employment and services centres. In some cases they will also have a tourism function or potential. Building sustainable communities within these towns means identifying and building on these local strengths and opportunities.

Building economically competitive, socially inclusive and sustainable communities where people want to invest, live and work, now and in the future, will require a combination of co-ordinated and integrated physical and social actions. Physical regeneration to improve the fabric of an area must be complemented by interventions that involve local people in regeneration activities. This involvement is necessary to revitalise and build the confidence of communities: strengthening social cohesion, developing community networks, and building the capacity of communities to be enterprising; and to ensure that local people are given equality of opportunity to access the benefits of local investments.

Activities supported under this priority will be focussed within the most deprived areas and in those communities where the activity is likely to have the most effect. All support provided under this priority must lead to some form of economic outcome to include jobs, sustainable trading business, increased economic activity and community activity that generates and secures wealth and must evidence early and ongoing community involvement. The *Wales Spatial Plan* framework provides the focus for the vast majority of the activity in this priority. This priority will be delivered through each of the following two themes, actions in which form part of integrated area programmes:

8.1 Theme 1: Physical Regeneration (including town centre renewal)

This theme aims to support the physical regeneration of communities, as part of an integrated regeneration strategy and where it can be demonstrated that focussed intervention will produce sustainable economic, environmental and social benefits. This will be achieved by:

- Supporting the integrated regeneration of the most deprived towns and villages by physical improvements to the urban fabric and the wider natural and built heritage. The activity will be carried out within the context of the relevant Spatial Plan strategy and in ways that involve local communities and organisations; and
- Developing and delivering effective ways of engaging local communities and developing local networks with the aim of finding and implementing local solutions for regeneration activity.

Indicative activities:

- Landscape and access improvements to towns and villages, including redesigning unsafe open landscapes and the rehabilitation of public spaces to bring them into economic use, and development of small-scale sites and premises. This may include carefully targeted local traffic management or the provision of road and parking facilities where these are ancillary to a development or will allow the proper functioning of the town centre, forming part of an integrated regeneration scheme;
- the redevelopment of or refurbishment and bringing back into use of rundown, obsolete, derelict or underutilised buildings for economic and social / community use.

It is expected that this theme will absorb around 72% of the resources for this priority.

8.2 Theme 2: Community economic development

This theme aims to build sustainable and vibrant communities by supporting activities which are part of an integrated regeneration strategy to overcome barriers to development of and participation in local economies. This will be achieved by:

- Encouraging access to, providing or improving services for local communities, where gaps in provision can be clearly evidenced, building on the engagement developed under Theme 1; and
- Increasing the economic contribution of the 'third sector'.

9. Life Centre Study – Bridgend (2003)

A proposed Life Centre in Bridgend would include:

- Central Library (including reference, family history and people's network access
- Arts and media training and performance centre, E-learning delivery and control centre
- Environmental learning facility
- Heritage and cultural centre, including a performance area to seat 250 – 300 (multi-purpose theatre space)
- Bridgend County council one stop shop
- Base for voluntary organisations including Crèche

The proposed site for the Life centre is an existing car park at Brackla Street. The King Sturge study investigates the feasibility of the inclusion of commercial areas within the building. The report does not go into any detail about the rationale behind the Life Centre. It is felt that the construction of the Life Centre would provide a destination in itself and serve to increase pedestrian flow to the library, theatre and other amenities.

10. Summary of Main Policy Implications

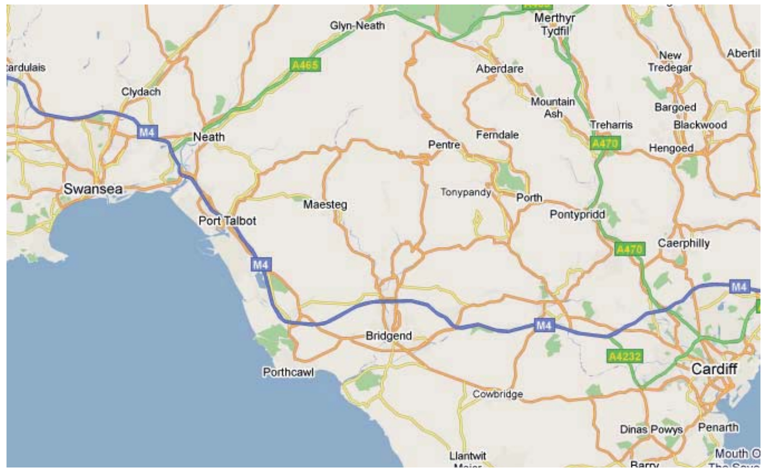
The above review of policy clearly demonstrates that the importance of regenerating our towns and cities is a key policy theme at all levels. It is recognised that the role of town centres extends beyond that of shopping centres as they need to provide a wide range of service and leisure facilities as well as serving the surrounding communities. In terms of Bridgend it is recognised that the town centre is not performing to its full potential. Like many other similar sized towns in South Wales, Bridgend town centre has suffered from a relative under investment in new facilities together with increased competition from neighbouring centres and new out-of-centre retail developments.

DTZ Healthcheck Assessment: Bridgend Town Centre (March 2010)

Planning Status: 'Town Centre'

Total Number of Units: 366
Total Number of Retail Units: 212
Total Retail Floorspace;690,000 sq ft

Location Map



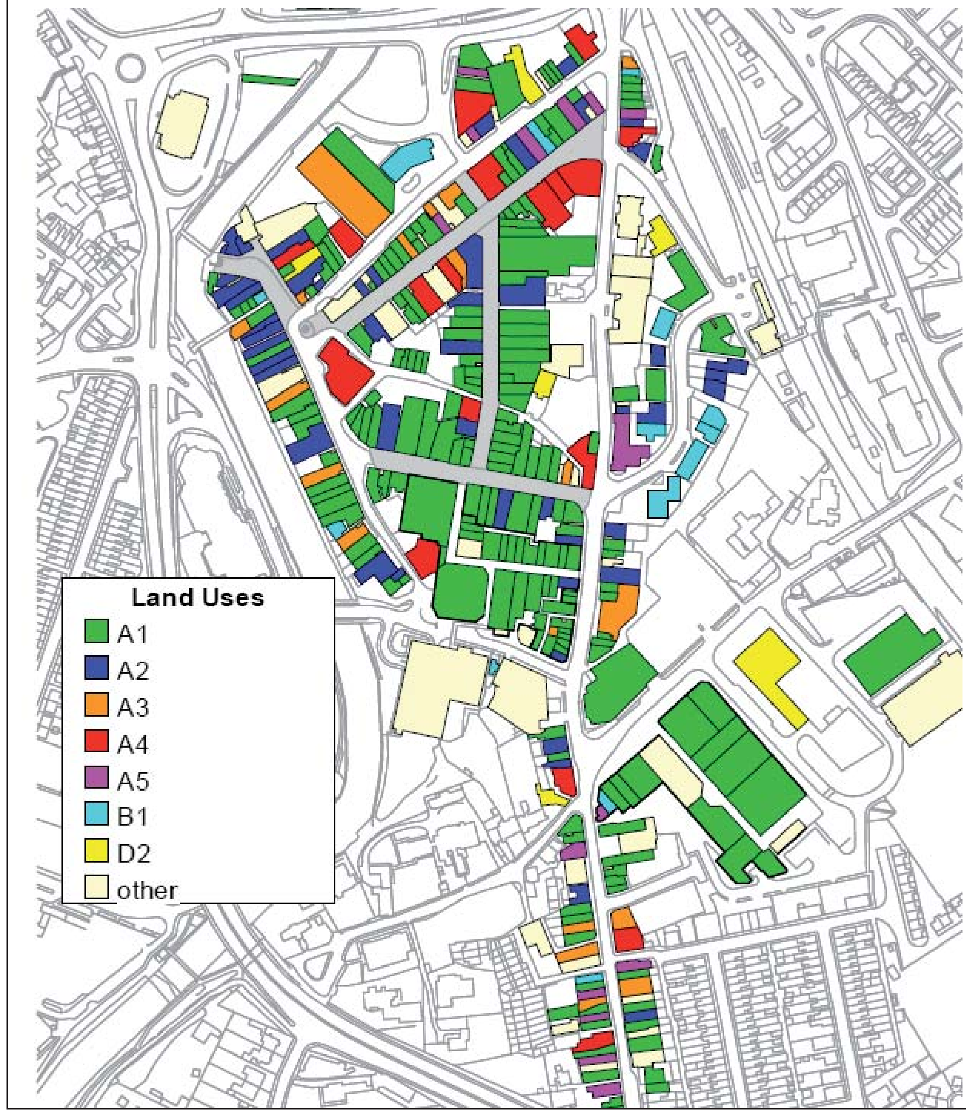
Bridgend is located about 20 miles from both Swansea and Cardiff. It is about 2.5hrs from London Paddington by train and within close proximity of the M4.

Centre Overview

Bridgend (urban area) has a population of about 40,000.The town centre is ring fenced by the A4061 to the north, the river to the west and the railway to the east. The centre offers a good variety and selection of shops including independents and nationals. Uses include retail, drinking establishments/entertainment, library, banks and other services and a bus station and rail station. The built environment is of varying quality but there are issues with general quality, arising from poor shop front maintenance for example. There seems to have been little private sector investment in the town centre, with the exception of the new Asda store. The public sector has undertaken some public realm improvements which have helped to enhance the quality of the environment in parts of the town.

Bridgend Healthcheck Assessment 2010

Diversity of Uses



The adjacent image illustrates the dispersal of land uses across the town centre and reveals a clear pattern of grouped uses in different areas of the town centre. A strong retail core centred on Caroline Street/Adare Street is evident. Nightlife is focussed on the north of the town centre with a number of pubs, bars, nightclubs and takeaways. A number of banks are clustered on Dunraven Place and an office district driven by legal and professional services is centred around the rail station.

The south east area (Brackla Street) consists of buildings with large footprints that have attracted A1 occupiers such as Argos Extra, Iceland and Farmfoods.

The far south of the town centre could be described as 'commercial fringe' or akin to a district centre in character. Units are small and relatively low quality. Uses include takeaways, tattoo artists, hairdressers and a florist.

Breakdown of Diversity of Uses (source GOAD)

Use	No. of Units	% of total units
A1	212	67
A2	52	14
A3	19	5
A4	21	5
A5	16	4
D2	6	2
B1	13	4
other	27	7
TOTAL	**366**	**100 (figures rounded)**

Bridgend Healthcheck Assessment 2010

Retail Floorspace.

	Floorspace (sq ft)
Town Centre	690,000
Retail Warehouse	370,000
Foodstore	492,000

Source: PROMIS

Retail Leakage

Catchment expenditure leaking to other centres	Value (£ Millions)
71.5%	1,455.4

Source: Bridgend Town Centre Vision Report

Retail expenditure is leaked to Swansea and Cardiff and out of centre retail developments in Bridgend such as Bridgend Retail Park and McArthur Glen.

A1 Retail

The main shopping area is centred on Caroline Street/Adare street. A number of national retailers are located here including Boots, Mothercare, New Look and Dorothy Perkins. There is no department or anchor store, although Wilkinson also occupies a large unit. The footprint of units is relatively small, and retailers such as Argos have therefore located at Brackla centre.

There is a high proportion of independent shops/cafes presumably helped by the absence of national/chain outlets, small units and reasonable rents.

A3 uses (A4, A5)

Bridgend town centre has a number of pubs, cafes, bars and a couple of nightclubs. These outlets range in quality but are positioned towards the lower end of the market. Higher quality units include the Old Cottage bistro (fronting the Walkway) and the Three Horseshoes Pub both of which seem to come off the back of public realm improvements. Barracuda bar occupies a decorative historic building. Takeaways are located in positions designed to attract night time trade, and do not appear to open in the day time. There are relatively few A3 uses in the town centre and an absence of any national chain restaurants and cafes.

Business Uses

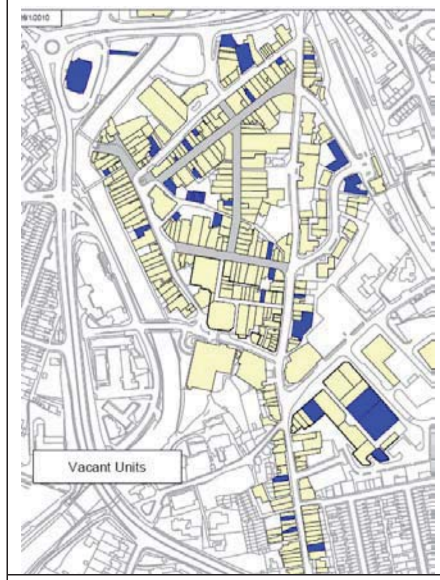
Existing offices are clustered around the rail station, and are generally occupied by solicitors and financial services. Brackla House is at the Brackla Centre and is occupied by Berry Smith solicitors but is part vacant. There is little dedicated office space in the town centre.

Leisure and Community

The review of land uses identifies very few leisure uses. The former bingo hall lies vacant and a new bingo hall has been developed on the edge of the centre.

Retail Capacity

Details of the Bridgend County Retail Needs Planning Study (2007 to 2021) are provided in the main report.

<table>
<tr>
<td rowspan="2">Vacant units

</td>
<td>Vacancy

Vacancy levels have increased recently as a result of the recession. About 40 of the 366 units in the town centre (11%) are vacant. Vacant properties tend to be located on the fringes of the town centre although all areas of the town centre are affected.</td>
<td>Estimated Retail Rental Levels (Zone A)

£ 70 psf (although DTZ comparatives show current deals at £40 psf) (Source: CACI/DTZ)</td>
<td>Typical Retail Yields

7%. This yield rate, suggests a recognised retail environment, but with some perceived risk to investors. (Source: DTZ)</td>
</tr>
<tr>
<td colspan="3">Pedestrian Flows and Accessibility

Pedestrian movement around the town centre is legible and easy, consisting of 5 or 6 key roads, some of which are pedestrianised. Elder Street is a useful pedestrian link and redevelopment of the vacant and derelict buildings should be used as an opportunity to improve the street. The link from the car park on Brackla Street to Nolton Street is ok, but could be improved. Movement out of the town centre is more difficult as it is enclosed by the river and the main roads. The town centre is accessible by car from Bridgend and the M4. A rail station and bus station in the town centre provide local and national connectivity by public transport.</td>
</tr>
<tr>
<td colspan="4">Environmental Quality: The quality of the town centre is mixed. There are some high quality historic buildings and public realm improvements have lifted overall quality, most notably at the bottom end of Queen Street. More negatively, poor maintenance and upkeep of a number of buildings and shop frontages detracts from the quality of the centre. There are some low quality buildings also. The Elder Street area represents a good opportunity to improve the quality of the environment.</td>
</tr>
</table>

Perception of Safety and Occurrence of Crime: The town centre felt safe in general at the time of our site visit. The number of vacant shops and poorly kept shop fronts could contribute to a lack of vibrancy and increase the perception of crime.

Opportunity Sites: Elders Yard, Elder Street, Brackla Street Car Park, Telephone Exchange, Brackla Shopping Centre, Seat garage (Nolton Street)

Bridgend Healthcheck Assessment 2010

SWOT Analysis

STRENGTHS:	WEAKNESSES:
• The Indoor Market • Tesco and Asda located on either edge of town centre • The number of Niche/ independent retailers • The presence of Multiple Retailers • The Riverside Walk • Public Realm improvements & Convergence Funding projects • Historic quality of Dunraven Place • Recent improvements to the historic environment of the town centre • Attractive 19th and early 20th century architecture • Strategic access to M4 and main arterial routes • Good public transport network with frequent bus and rail services. • Good level of services within the town centre (e.g. banks, estate agents) • Attractive riverside parks close to the southern periphery of the town centre	• Limited "sense of arrival" and gateway to the town centre • Poor signage and surplus street furniture • Retail offer is not as diverse in comparison to similar towns • Strong completion from competing centres and out of town locations • Town's form and fabric has been eroded • Lack of town centre facilities (e.g. toilets, crèche) • Lack of events space • Connectivity and permeability is poor • Lack of green space in town centre • Location and quality of multi-storey car parks • Car parking charges and method of payment • Limited diversity of evening economy • High vacancy levels for town centre offices • Limited leisure uses • Shortage of modern retail units with large floor plates in the town centre • Lack of civic focus/town square
OPPORTUNITIES:	**THREATS:**
• Catchment population • Retail Capacity does exist for additional retail space in town centre • Branding of town centre based on existing heritage and character and preparation of the Conservation Area Management Plan • Planned improvements to railway station • Attractiveness to mid market retailers • Convergence Funding • Re-development of Bridgend Recreation Centre • Improving linkages to Newbridge Fields • Private sector interest/investment • Enhancing the potential offered by the river • Council's office requirement • Public sector landholdings in town centre • Redevelopment schemes in the pipeline • Further opportunity for niche/ independent retailers • Town Centre Management • Enhancing tourism potential • Improving the quality and diversity of the evening economy • Further THI Funding Programme	• Image and reputation • Extent of out of town retail offer in Bridgend • Swansea and Cardiff improving their retail offer • Lack of private sector interest • Further decline in the current retail offer • Lack of national multiples • Lack of local ownership of town centre/ identity • Doing nothing • Limited public funding • Current financial climate

Summary

Bridgend town centre serves its local population, which is relatively sizeable and relatively average in terms of its affluence and retail expenditure. The town centre is threatened by the larger settlements of Cardiff and Swansea, and by the increasing amount of out of town retail. However, the town centre retains its role as the service centre and despite issues of lack of private investment, cases of poor environmental quality and the impact of the recession on vacancies, the town centre is well placed to improve its role in the retail market and centre hierarchy. The town needs to draw back lost trade by improving the quality of its offer to increase shopper numbers and dwell times.

Public realm improvements have lifted the overall quality of the town centre and have to some extent been a catalyst for private investment, and at the least, a perception that the town centre is 'on the up'.

There are a number of redevelopment opportunities to drive forward the success of the town centre.

APPENDIX

02

MARKET REVIEW

Bridgend Town Centre Masterplan

Appendix 2:

Market Review

FINAL DRAFT

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APPENDIX

02

MARKET REVIEW

1. Commercial Market Review

The baseline review has been prepared by DTZ to provide a current overview of development activity in Bridgend.

The purpose of this review is to provide a robust baseline assessment of the key commercial property sectors in the town in order to understand the core development parameters which will inform the regeneration of the town. It is important that an overview of the existing and emerging commercial picture is established for its future growth.

A summary of each of the current commercial and development market by core sector is provided in the following chapters. For the purposes of this baseline report, DTZ have primarily utilised statistical information from PMA PROMIS and Focus.

1.1 South Wales Overview

The South, West and Mid Wales commercial property market is dominated by a few centres situated along the M4 corridor. Cardiff, Newport and Swansea are the dominant centres within the southern half of Wales. These cities provide critical mass in the three primary property sectors: office, retail and industrial. Their popularity is underpinned by the strong infrastructure and motorway access.

Cardiff is Wales's dominant city. Newport, despite its proximity to Cardiff, has remained a strong commercial centre and is benefitting from a renaissance driven by capital investment. Swansea remains Wales's second city and the dominant commercial centre for West Wales forming the focus for the largely rural hinterland to the north and west. Junction 43 of the M4 is an important link to towns such as Neath and Aberdare via the A465 whilst the western end of the M4, at junction 49 provides the nodal link to central Wales via the A438/A40 and West Wales via the A48.

The highlight of 2009 for South Wales was the opening of St David's 2 in Cardiff. The Land Securities/Capital Shopping Centres scheme boasts a £675 million investment in Cardiff city centre and comprises circa 967,000 sq ft (89,891 sq ft). The development also includes 300 luxury roof top apartments, 3000 car parking spaces, 21 catering outlets and a state of the art Central Library comprising 5,109 sq m (55,000 sq ft). The scheme that opened in autumn 2009 is anticipated to attract more than £250 million of new spending to Cardiff every year and establish Cardiff as one of the top retail destinations in Europe. Despite opening during the recession, the centre has been well received by both shoppers and retailers with early trading figures holding up well.

Newport has had an exciting year with the 2010 Ryder Cup at The Celtic Manor in October. The Welsh Assembly Government and Newport City Council are working on an ambitious programme to regenerate and revitalise the City of Newport. In the next ten years, Newport will undergo one of the greatest transformations of any UK City. The redevelopment will focus on three areas: Central area – city centre retail re-development; East Newport – a new community development to include 5,000 homes and local facilities and West Newport - building on the success of Newport West Business Parks. The scaling down of the redevelopment of Newport city centre was an unfortunate result of the credit crunch, however the university development on the waterfront is ensuring momentum of regeneration.

Swansea has continued progress with the SA1 redevelopment, the mixed use regeneration of the East Docklands expected to comprise over £200m of investment over the next 10-15 years. However, delays with the regeneration of the city centre, which comprises delivery of a mixed use scheme that will create a step change in the retail offer, continue due to the economic climate.

1.1.1 Retail

The view from the retail sector is that 2010 will continue to see transactions taking place as there is a level of occupier demand; however requirements are now more selective and opportunistic. As mentioned previously, Cardiff saw the completion of St David's 2 in 2009 and this is anchored by the first John Lewis Wales, and also the largest outside of London. Other occupiers in the scheme include: Karen Millen, Coast, H&M and Cult in addition to some upmarket fashion retailers such as Hugo Boss, Reiss, All Saints, Kurt Geiger, Molton Brown, L.K.Bennett and White Stuff.

Retail yields have moved out significantly, however the latter part of 2009 saw demand returning for prime assets evidenced by Royal London selling their holding on The Hayes in Cardiff for sub 6%. Occupiers have seen similar trends as in rest of UK, with headline rents under pressure and landlords granting more incentives to attract or retain tenants. Nevertheless, fewer retailers have gone into administration than some predicted so potentially the toughest times are now in the past. In terms of out of town retail, the outward movement of yields on retail parks was particularly rapid, although by the end of the year open A1 warehousing was again proving popular with investors and yields were moving back towards 7%.

1.1.2 Offices

Cardiff is the main focus of the South Wales office market. Despite the economic conditions, city centre Grade A offices held up well last year with headline rents remaining around the £20 psf mark.

Prime yields in Cardiff moved out to circa 8% in 2009, however towards the end of last year an improvement in yield profile was seen as more overseas funds were actively looking at Cardiff as an investment option. Yields in out of town and less established locations experienced a shift out towards double figures. With the public sector occupying a good percentage of office stock in South Wales, over-supply is not considered to be a major issue.

2. Bridgend – General Overview

Bridgend is centrally located within South Wales approximately 32 km (20 miles) east of Swansea, approximately 32 km (20 miles) west of Cardiff and 305 km (190 miles) west of London. Bridgend is easily accessed from Junction 35 of the M4, and the A473. The nearby centres of Porthcawl, Port Talbot and Barry, are all situated within 25 miles of Bridgend town centre.

The total population within the Bridgend primary catchment area is approximately 175,000. Bridgend's ACORN profile is biased towards 'wealthy executives', 'flourishing families' and 'secure families'. The age profile of the Bridgend primary catchment population includes a relatively high proportion of older working adults aged 45-64 and in contrast, young adults aged 15-24 are moderately under-represented within the Bridgend area. The main employers in Bridgend include Sony Manufacturing Co UK, Ford Motor Co Ltd, Tesco Stores Ltd, HMP Parc, the County Borough Council and Bridgend College.

2.1 The Town Centre

In terms of Bridgend town centre, the existing uses include retail, drinking establishments/entertainment, library, banks and other services and a bus station and rail station. Bridgend is classed as a Value Regional Town in the CACI's Retail Footprint classification. The Centre offers a good variety and selection of shops including independent and national operators while also retaining its role as the service centre of the Borough. The main retail core is centred on Caroline Street/Adare Street and a range of other 'A' use class retailing is set around this retail core. Retail tenants in the town centre include: Boots, New Look, Monsoon, and Topshop and Vodafone. This area of the town centre is considered prime, albeit without a department/anchor store.

Approximately 65% of buildings in the town centre are in A1 retail use. PROMIS indicate that circa 40 of the 366 units in the town centre (11%) are vacant. Vacancy levels are comparable to the national average, but have clearly increased recently as a result of the recession. The area on Dunraven Place has a cluster of A2 uses including occupiers such as: Britannia Building Society, Barclays Bank, Omega Financial Advisors and a number of estate agents offices. An office district driven by legal and professional services is centred around the rail station. Brackla House is located close to the Brackla Centre, and is occupied by solicitors but is part vacant. Apart from this provision, there is relatively low dedicated office space.

The south east area (Brackla Street) consists of buildings with large footprints that have attracted occupiers such as Argos Extra, Iceland and Farm foods. The far south of the town centre is Nolton Street and could be described as 'commercial fringe' or akin to a district centre in character. Units are small and include takeaways, tattoo artists and hairdressers.

The current leisure offer is limited in Bridgend. The main leisure and recreation area and Newbridge fields is a 3 minute easy walk from the Rhiw but the route could be enhanced to improve its legibility. Nightlife is focussed on the north of the town centre around Market Street, with a number of pubs, bars, nightclubs and takeaways; however the evening economy is limited by the exclusion of traffic from the town centre, which limits activity and ease of use of the town centre.

The creation of the river boardwalk has been a significant intervention that will allow businesses to open up onto the boardwalk. One restaurant has opened onto the boardwalk but other businesses are yet to take this opportunity as most of the buildings currently turn their backs to the boardwalk and significant investment is therefore required. While the riverside could be a real asset to the town in offering an amenity which connects the principle gateways (certainly from the west) and stimulates growth in the leisure market, its' appeal is diluted by the flood defence measures which only serve to conceal the river from view and the orientation of buildings that turn their back to the river. Most of the new entrances from the boardwalk backs onto buildings on Dunraven Place and Queen Street remain unused and a phased strategy to fully exploit the amenity value of the riverfront and encourage movement and access is required.

Public realm improvements have lifted the overall quality of the town centre and have contributed as a catalyst for private investment. Whilst small, recent improvements are important and can guide the future intervention that is required in order to deliver the step change in the town centre environment and performance.

In terms of out of town retail, the McArthur Glen Designer Outlet Centre which opened in May 1998 is situated circa 4km (2.5 miles) from the town centre and is located off Junction 36 of the M4. The Centre has 90 stores totalling circa 22,388 sq m (241,000 sq ft) plus a 9 screen cinema complex, food court, restaurants, cafes, children's play area and tourist information centre. The Centre also provides 2000 free car parking spaces.

The Bridgend Town Centre Vision Report (2008) prepared by CACI in December 2007 concludes that the current value-orientated retail mix of Bridgend Town Centre is not presently meeting the socio-economic and demographic characteristics and consumer needs of key groups in the catchment area where there are significant concentrations of 'Suburban Comfort'. The report also concludes that there is scope to improve the retail health of the Town Centre.

3. Retail

The total population within the Bridgend primary catchment area is circa 175,000. This is ranks the town 148 out of the PROMIS centres. The estimated shopping population of Bridgend is 78,000 which PROMIS considers to be normal for what is defined in the Average Towns category. Data from PMA shows that Bridgend's retail catchment population of 175,000 has a retail comparison goods (non-food) spend of £372m. This compares favourably to other town such as Llanelli (£212m), Rugby (£295m) and Kidderminster (£315m) and is above the average catchment spend of the PMA 'average town' classification (£357m).

Bridgend ranks 157 (where 1 = best) in terms of the volume and comparison retail spend available in the catchment area and is forecast to see around average percentage growth in the available comparison spending over the forecast period 2009-14.

3.1 Town Centre Retail Ranking

Town centre retail floorspace in Bridgend is estimated at 64,101 sq m (0.69million sq ft) which is comparable with the average town 'average' and ranking the town 162 of the PROMIS Centres on this measure.

Bridgend currently ranks 190th out of the top 300 retail centres. Rugby and Kidderminster rank 173rd and 170th despite having lower catchment retail expenditure. This suggests that Bridgend town centre is currently underperforming. Bridgend ranks 157 on the PMA Fashion Score and 197 on the PMA Anchor Score where 1 = best. PROMIS concludes that Bridgend has broadly the expected volume and quality of retail provision, given the size and affluence of the shopping population. For clarity, the McArthurGlen Designer Outlet in Bridgend is not included in the estimate of town centre floorspace or the PMA Retail Scores for the town centre. In terms of retail provision, the below table illustrates how Bridgend compares to the PMA Centre Type Average:

Retail Provision					
	BRIDGEND		PMA CENTRE TYPE AVERAGE (AVERAGE TOWN SQ FT)		RETAIL PROMIS RANK (RANK OUT OF 200, 1=BEST)
	Sq m	Sq ft	Sq m	Sq ft	
Total Floorspace	64,000	690,000	70,604	760,000	162
Total managed floorspace	13,000	140,000	19,509	210,000	167
% managed floorspace	20		28		147
No of managed centres	2		2		
Number of multiples	51		64		189
PMA retail provision score	75		100		190
PMA Fashion score	45		45		157
PMA anchor stores score	0		12		197

Source: PROMIS January 2010

The table demonstrates the total floorspace and total managed floorspace in Bridgend is below the PMA average for the centre type. It also demonstrates that Bridgend is also below average in terms of number of multiples and highlights the effect the absence of an anchor store has on the rating. Marks and Spencer are not present in the town centre; however they occupy space in the McArthur Glen designer outlet centre approximately 4 km (2.5 miles) from the town centre.

The PMA fashion score shows that Bridgend is in line with the PMA average, however the Retail PROMIS rank of 157 (where 1 = Best) shows that there is scope for improvement. To detail this further, it transpires that Bridgend has a slightly above average representation of discount and lower middle fashion and is below on middle and quality representation. This is evidenced by the prominence of retailers such as: Profile Pink, Select, Priceless Shoes, Seconds Ahead, Bon Marche, and Ethel Austin.

The footprint of units is relatively small, and retailers such as Argos have located at the Brackla centre. There are a high proportion of independent shops/cafes presumably helped by the absence of national/chain outlets, availability of small units and reasonable rents.

3.2 Managed Floorspace

Bridgend has below average proportion of managed floorspace with approximately 20% of the total retail floorspace accounted for by the town's two managed shopping centres: Brackla Street Centre and The Rhiw Centre. The Brackla Street Centre comprises approximately 10,126 sq m (109,000 sq ft) (gross) and The Rhiw Centre comprises approximately 6,967 sq m (75,000 sq ft) (gross).

The Rhiw Centre situated just off the prime shopping area of Caroline Street, has occupiers such as: Boots, Johnsons Dry Cleaners, WH Smith, La Senza and Greggs. The centre is managed by Colliers CRE. The centre also includes the town's market hall which has 36 stalls offering a range of services/goods such as confectionary, second hand books, fruit and vegetables, jewellers and butchers.

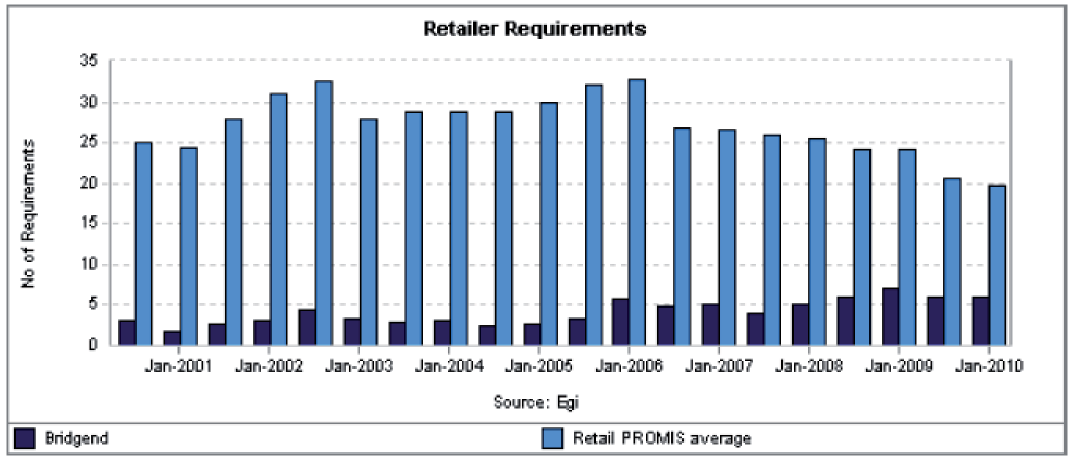
The Brackla Centre situated to the south east of the town centre and is dominated by larger A1 units with occupiers such as Iceland, Farmfoods, Argos and Peacocks. The Centre is somewhat dated and has scope for improvement with a number of units sitting vacant and in a poor state of repair.

Future change to the managed floorspace supply is anticipated at the Brackla Centre, where Hawkstone Properties have full consent to refurbish and extend the Brackla Street centre by circa 1,850 sq m (20,000 sq ft) to approximately 11,900 sq m (129,000 sq ft). Hawkstone Properties were responsible for the redevelopment of a small parade of shops on Adare Street in 2005. Work on the Brackla Centre was due to commence in spring 2010 to include a significant upgrade and refurbishment of the main mall and rear Plaza entrance but this is yet to take place. A new 5,574 sq m (60,000 sq ft) Asda store is situated directly behind the Centre.

William Ewart Properties are the owners of the Rhiw Shopping Centre. The CACI Report 2007 included proposals for an 18,580 sq m (200,000 sq ft) extension to this shopping centre.

3.3 Rents and Yields

Bridgend has a lower than average level of demand for a town of its size and status. In January 2010, there were 6 reported requirements for Bridgend against an average of 20, ranking the town 173 of the PROMIS Centres. The below graph illustrates the number of retailer requirements for Bridgend in comparison to the Retail PROMIS average over a nine year period from 2001 to 2010.



Source: PROMIS, January 2010

Prime rents were estimated at £60 psf Zone A (PROMIS). This showed a decline on the mid 2009 level of prime rents in the town. However, the trend of a decline in 2009 in Bridgend is in line with the retail PROMIS average. For information prime rents in Cardiff are £260 psf Zone A, in Newport £100 psf Zone A and in Swansea £125 psf Zone A.

Prime retail yields in Bridgend are in the region of 7.50%. This places Bridgend 176th in the retail PROMIS rank (where 1 = best). For information prime retail yields in Cardiff are 5.50%, in Newport 6.75% and in Swansea 6.50%.

3.4 Retail Warehouses

Retail warehouse supply has been estimated at 34,370 sq m (370,000 sq ft) which ranks the town 158 of the PROMIS centres. Most goods categories are under-represented in terms of provision per household particularly child/sport, fashion/other, high street and electrical goods. In contrast, furniture goods are over represented.

Around 72% of total retail warehousing floorspace in the Bridgend area is on retail parks, significantly above the Retail PROMIS average. The retail warehouse and leisure provision is summarised below:

Park	Non food sqm	No of non-food units	No of food stores	No of leisure units	No of catering outlets
Waterton Retail Park	12,541 sq m (135,000 sq ft)	7	0	1	0
Bridgend Retail Park	12,262 sq m (132,000 sq ft)	8	2	0	1

Source: PROMIS, January 2010

Waterton Retail Park, which is owned by Royal London Asset Management and Scottish Life, includes Allied Carpets, B&Q, Carpetright, Dreams, Esporta, Harveys, and Tile & Bath World.

Bridgend Retail Park which is owned by Prudential Property Investment Managers, Prudential Staff Pension Scheme includes the retailers: Brantano, Comet, Currys, Halfords, Homebase, Lidl, McDonalds, Pets at Home, Ponden Home, Argos, Dunelm, SCS and Tesco.

In terms of foodstore provision, the Bridgend area has an estimated 45,700 sq m (492,000 sq ft) of floorspace in the area ranking it 134 of the reported PROMIS Centres. The provision per household is around average.

Competing retail provision

According to the PMA competition indicator, Bridgend town centre faces above average competition from competing retail centres and ranks 165 out of the 200 PROMIS centres on the PMA Competition Indicator, whereby a rank closest to 1 reflects a low level of competition. In particular, Bridgend faces strong competition from outlet centres. The Bridgend Town Centre Vision Report (Dec 2007) identifies that the town centre experiences the greatest competition from Cardiff and the McArthur Glen designer outlet centre. In addition, there is also the Talbot Green Shopping Park, and Fforestfach Retail Park in Swansea. The plan below shows the proximity to competing centres such as Port Talbot, Cardiff and Swansea.

Source: PROMIS, January 2010

Residential

In accordance with the approved land use strategy for the UDP, Policy 4 identifies the requirement of 9950 dwellings to satisfy the future housing needs of Bridgend County Borough Council in the period 1996-2016.

The residential market in South Wales enjoyed a sustained period of growth from the turn of the century up until the global credit crisis began to impact on buyer confidence and the availability of domestic mortgages during the last quarter of 2007. Demand for housing was strongest along the M4 corridor between Chepstow and Swansea with the main hotspots being Monmouthshire, Vale of Glamorgan and the commercial centres of Cardiff, Bridgend, Swansea and to a lesser extent the northern suburbs of Newport.

2009 was a difficult year for the housing market. Mainstream house builders have taken time to regroup over the past 12 months, and have emerged with a focus on securing sites for traditional housing and a demand led analysis. The forecast is for continued growth in demand for residential land in the prime locations with a marginal growth in demand for secondary locations north of the M4.

There are limited Plc housebuilders who now operate in the region. Most have returned to the market for land, however requirements are now for oven ready sites in prime locations that will be suitable for conventional, mostly 2 storey family accommodation rather than flats and 3 storey town houses. Housing densities are therefore falling to an average of 16,000 sq ft/acre from an industry norm of 22,000 sq ft per acre on urban sites a few years ago. Deal structures are now commonly deferred terms and building licences particularly on the lager sites or sites with significant up front infrastructure costs.

3.5 Supply

In Bridgend, Broadlands has been the focus of residential development in recent years. Broadlands is a suburb located to the south west of Bridgend and comprises an area of circa 2,500 homes, mainly private housing. Development at Broadlands began in 1998; however Persimmon currently has a live development at Ffynnon Duffryn which will deliver 250 homes on the estate.

Llanmoor Homes currently has three live housing developments in the Bridgend area: Pentre Felin in Tondu (163 dwellings); Llys Derwen in Litchard (circa 35 dwellings); and Llwyn Castan Broadlands (70 dwellings).

Parc Derwen situated to the north east of Bridgend has 85 hectares (210 acres) is allocated for 1,500 dwellings and associated facilities in the Bridgend UDP. The 1,500 dwelling development is a joint venture between Welsh Assembly Government, Gallagher Estates, Persimmon Homes, and Taylor Wimpey and is designed to create a village for the 21^{st} century adopting highest standards for housing design and the environment. The first phase infrastructure works are now complete and the first phase of housing is under construction.

The following points review the current and future residential market in Bridgend:

- Bridgend has traditionally provided most of its housing allocations on major greenfield urban extensions such as Brackla, Broadlands and Parc Derwen. There have been relatively few infill or windfall sites completed when compared to other authorities.

- Parc Derwen is likely to provide the main source of new homes for Bridgend in the next 5-10 years. Housebuilders consider that there is sufficient strength of demand for land releases of up to 5 acres in Bridgend town and the surrounding villages.

- There is uncertainty against the delivery and timescale of some projects in the area which impacts developer confidence.

- ‘Clean’ residential site values in the Bridgend area are approximately £550,000 per acre for private housing and nil to £300,000 for affordable housing, depending on availability of grant mix of tenure and unit type.

4. Offices

The Government's objective of sustaining and enhancing the vitality, attractiveness and viability of town centres is complemented by advice to encourage the diversification of uses within the town centre as a whole. The following town centre sites are allocated in the Bridgend UDP for office development:

- Former SWALEC Depot, Tremains Road (0.5 ha);
- Land South of Mackworth Street, Bridgend (0.17 ha);
- Land at Coity Road, Bridgend (0.07 ha); and
- Former Courage Depot Site, Tondu Road, Bridgend (0.44 ha).

4.1 Supply

Traditionally, the supply of offices in the Bridgend area has been within period buildings in the town centre as well as offices above shops. This created a pent up demand for quality, modern offices predominantly from indigenous companies. This in-balance in supply and demand was recognised by a number of developers and over the past few years, a number of speculative office schemes have emerged both on the periphery of the town centre as well as out of town, which proved very successful.

Most notably, Macob have developed 2 phases at Bocam Park (adjoining junction 5 of the M4 motorway) the latter of which will provide up to 112,000 sq ft, 63,000 sq ft of which has been completed to date arranged over 11 buildings. The scheme offers suites/self contained units ranging from 1,250 – 30,000 sq ft and approximately 40,000 sq ft has been let or sold to date to the likes of Skanska (6,300 sq ft), Fields Associates (3,180 sq ft) and Bro Morgannwg Health Trust (3,000 sq ft). Lettings have been achieved at £14.50 per sq ft and sales at £150 per sq ft. The specification includes raised floors and comfort cooling as standard.

To the south of the town centre, Charnwood Group have built out approximately 18,000 sq ft at Charnwood Park, arranged over 3 phases and comprising 2-storey units capable of sub-division to offer from 1,000 sq ft. All suites were sold at a price of circa £150 per sq ft to the likes of Drain-tech, Clerical & Medical, and most recently Dekor.

Adjoining Charnwood Park, Jehu have developed a total of 20,000 sq ft at Waterton Park, arranged over two 3-storey buildings capable of sub-division on a floor-by-floor basis to offer from 1,250 sq ft. 7,000 sq ft remains available with a number of lettings/sales having been achieved at £12.95 per sq ft and £150 per sq ft respectively to the likes of the NHS Trust and Alcamy.

In the town centre itself, a number of small office lettings and sales have been completed over the past 12 months offering from 1,981 sq ft and providing basic accommodation. This has included 4 Court Road which were let at a rent of £15,000 per annum, £7.57 per sq ft to Bridgend Women's Aid. In addition, 1,370 sq ft at 9 Derwen Road comprising B1 offices were let to Kelway (UK) Ltd at a rent of £15,070 per annum equating to £11 per sq ft per sq ft. Ravens Court on Brewery Lane is a contemporary, Grade A building comprising a total of 2,090 sq m (22,500 sq ft) and has recently been purchased by the Council.

In terms of current available office space in Bridgend town centre, DTZ is currently marketing 224 sq m (2,413 sq ft) of office accommodation at 14- 18 Queen Street. The accommodation provides eight car parking spaces and is marketed with good public transport links and its town centre location.

Brackla House on Brackla Street is a four storey office development occupying a prominent position in Bridgend town centre. The building has recently been refurbished and part of the building (up to 40 sq m/ 436 sq ft) is currently being marketed.

A private sector development of the former chest clinic and 5-7 Court Road have added circa 1,858 sq m (20,000 sq ft) of office space to the town.

4.2 Demand

According to Focus, CPL Training Ltd has had a published requirement for 371 – 464 sq m (4,000 – 5,000 sq ft) of freehold space which has been live since May 2009. Titan Environmental Surveys Ltd has a requirement for 278 sq m (3,000 sq ft) of leasehold space to accommodate 20 staff, due to expansion of the firm, which was published in September 2009.

2008/9 take-up for both Bridgend and the M4 corridor in general (including Swansea, Cardiff and Newport) fell significantly which is unsurprising given the well publicised difficulties in the financial markets which are undoubtedly impacting on the service sector generally.

4.3 Development Pipeline

Few office schemes are coming forward in Bridgend, as in the rest of South Wales as a result of the recession. Developments such as those highlighted above which were completed just before or during the recession are likely to absorb future demand in the short term. This will probably delay any new space coming to the market.

DESIGN PRINCIPLES & URBAN FORM

Design Principles

The core design principles have been extracted from best practice urban design guidance including 'Creating Sustainable Places' (WAG), the Design Compendium, Responsive Environments, Manual for Streets and Building for Life and applied to the development strategy and potential development sites for Bridgend town centre.

COMPACTNESS

To provide a truly sustainable scheme it is essential to consider efficient and appropriate land uses. To achieve this development will need to:

- Provide an appropriate density of development for a site that is in close proximity to public transport routes and local amenities
- Create places for people, whilst recognising the need for the car, through provision of routes for pedestrians and cyclists, and careful consideration of surface treatments
- Provide practical and usable amenity space, which reflect desire lines and meet public need

ACCESSIBILITY

An accessible scheme will accommodate all users and ensure safe and secure access to local facilities. The sites should be incorporated into the local movement network by:

- Facilitating movement within the site and surrounding areas
- Connecting to public transport and the town centre core via attractive and safe pedestrian and cycle paths
- Ensuring pedestrian movement is safe and easy with cars prevented from dominating
- Establishing a layout that is permeable and responds to local desire lines
- Designing access for all including the needs of those with visual and hearing impairments and those with limited mobility
- The schemes must be DDA compliant.

LEGIBILITY

A legible scheme will allow people to easily read their surroundings and orientate themselves. Legibility should be created or enhanced by:

- Clearly marking entrance points and routes through the town centre
- Creating identity and character using the town's characteristics and new design elements
- Defining spaces which are memorable.
- Using key buildings to act as visual markers
- Landscaping and varying materials to indicate clear routes
- Creating a central focus for development

CONTEXT AND CHARACTER

Integrating the development site into the surrounding area and establishing character is vital in delivering a successful scheme. This includes locally distinctive development patterns, landscape, culture, materials and bio-diversity. To enable this:

- The development of sites will adopt a style and character which draws on and interprets the key elements of the surrounding settlement
- The scale and massing of the development will respond to surrounding development
- The development will contribute a positive change to the image of the area with high quality new development
- The development will pay regard to the Conservation Area and the Conservation Area Management Plan

APPENDIX

03

DESIGN PRINCIPLES & URBAN FORM

CONTINUITY AND ENCLOSURE

The enclosure of streets and spaces, a consistent building line and active frontages onto the public realm are essential components in the creation of a safe and secure environment. This helps to create a stronger sense of place and identity and encourages social interaction. The development sites must have:

- Units that face on to streets and spaces creating high levels of activity and surveillance
- Spaces that are well enclosed by development to create a sense of place and to promote public safety and security
- A relationship between building height and road/space width to create the appropriate sense of enclosure in relation to spatial role and form
- Clarity in what is public and what is private space

ADAPTABILITY

The scheme must be designed to be robust, to accommodate possible change in use over time as the needs and expectations of inhabitants and users change. This can be achieved through:

- Creating flexible development plots, to allow units to be converted or extended
- High quality architecture that is built to last, and permits alteration to the structure over time
- Designing spaces that are capable of adapting over time and which can fulfil a number of roles
- Streets that are simple, robust and clutter free

VARIETY AND DIVERSITY

Variety and diversity are integral factors in increasing the choice available to people. This may be visually in terms of building form and detail, or the nature of a given space. Variety and diversity should be increased via the following:

- Variety in building form, plot structure, detailing and materials to create uniqueness
- Creating distinctive spaces that add character to the development

RESOURCE USE AND ENERGY EFFICIENCY

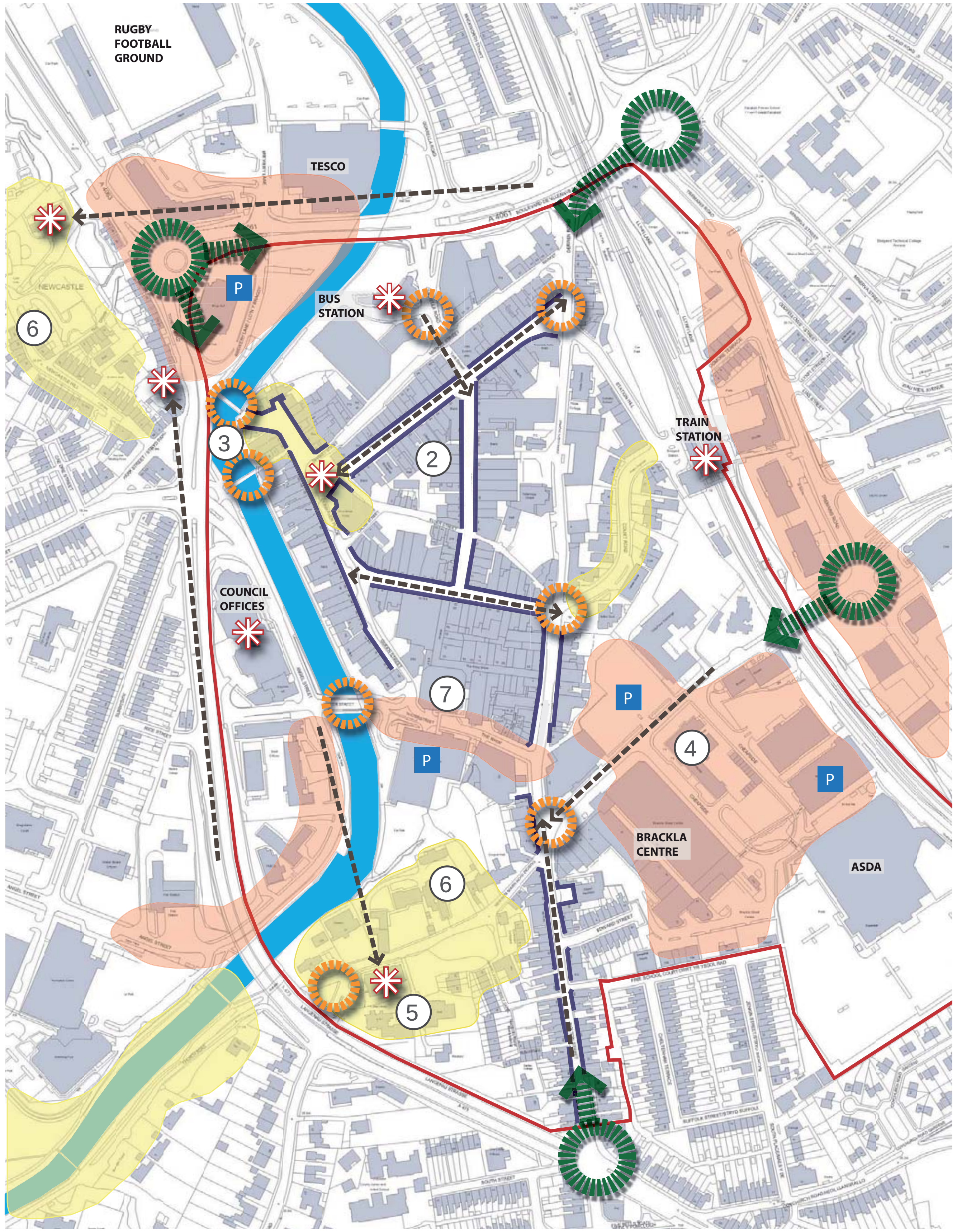
The development sites should be designed and delivered to minimise resource use and maximise energy efficiency during construction and operation

- Orientation to take advantage of passive solar gain should be considered.
- Conservation of energy consumption both during construction and by the sites end users
- Conservation of water through reduced consumption
- Minimising surface water runoff

RICHNESS

Richness relates to the sensory experience of a place. The design of buildings should seek to stimulate the senses through detailed design and to allow for richness to develop over time. In doing so, the design should consider how to enhance the user experience through;

- Sight
- Touch
- Smell
- Sound
- Movement



Townscape analysis

Townscape Analysis

1. The town centre includes the Merthyr Mawr Road and Bridgend Town Centre Conservation Areas. The Bridgend Town Centre Conservation Area is located to the north of the town centre and encompasses predominantly Georgian and Edwardian buildings. There are 37 listed buildings in the Conservation Area, which highlights the town's heritage qualities. (see figure to the right)

2. The retail core of the town centre (areas where important building lines of commercial and retail units exist) isn't visible from key vehicular access points or key pedestrian gateways.

3. There are a variety of fairly confined pedestrian access points into the town centre from all directions.

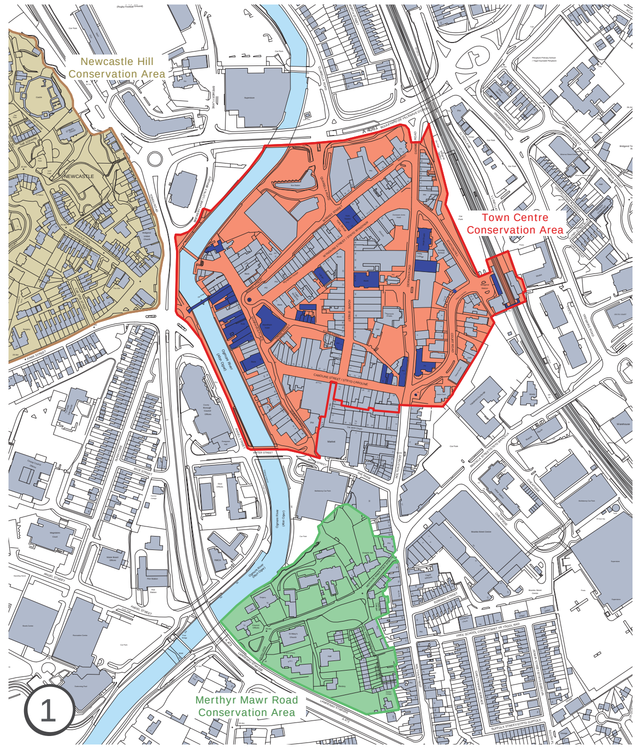
4. Some areas have little or no distinctive character or interest. These are mostly areas where the heritage fabric of the town centre has been lost and in-filled at a later stage

5. 'Landmark buildings' (either a visual or destination landmark) exist around the periphery of the town centre, but fewer landmark buildings exist in the core.

6. Some areas which have a 'distinct sense of place' are poorly linked to the town centre (e.g. Merthyr Mawr Road North).

7. Some buildings and places fail to reflect the vitality of the area. For example, the Bridgend market is unique to Bridgend, but the building has a negative image.

8. Vehicular gateways from Cowbridge Road and Tondu Road boast long views which are terminated by poor quality buildings.



Bridgend conservation areas and listed buildings within the town centre

- Landmark
- Important building line
- Extended view
- Vehicular town centre gateway
- Pedestrian town centre gateway
- Area with distinct sense of place
- Area with no distinct sense of place
- Town centre core study area

APPENDIX

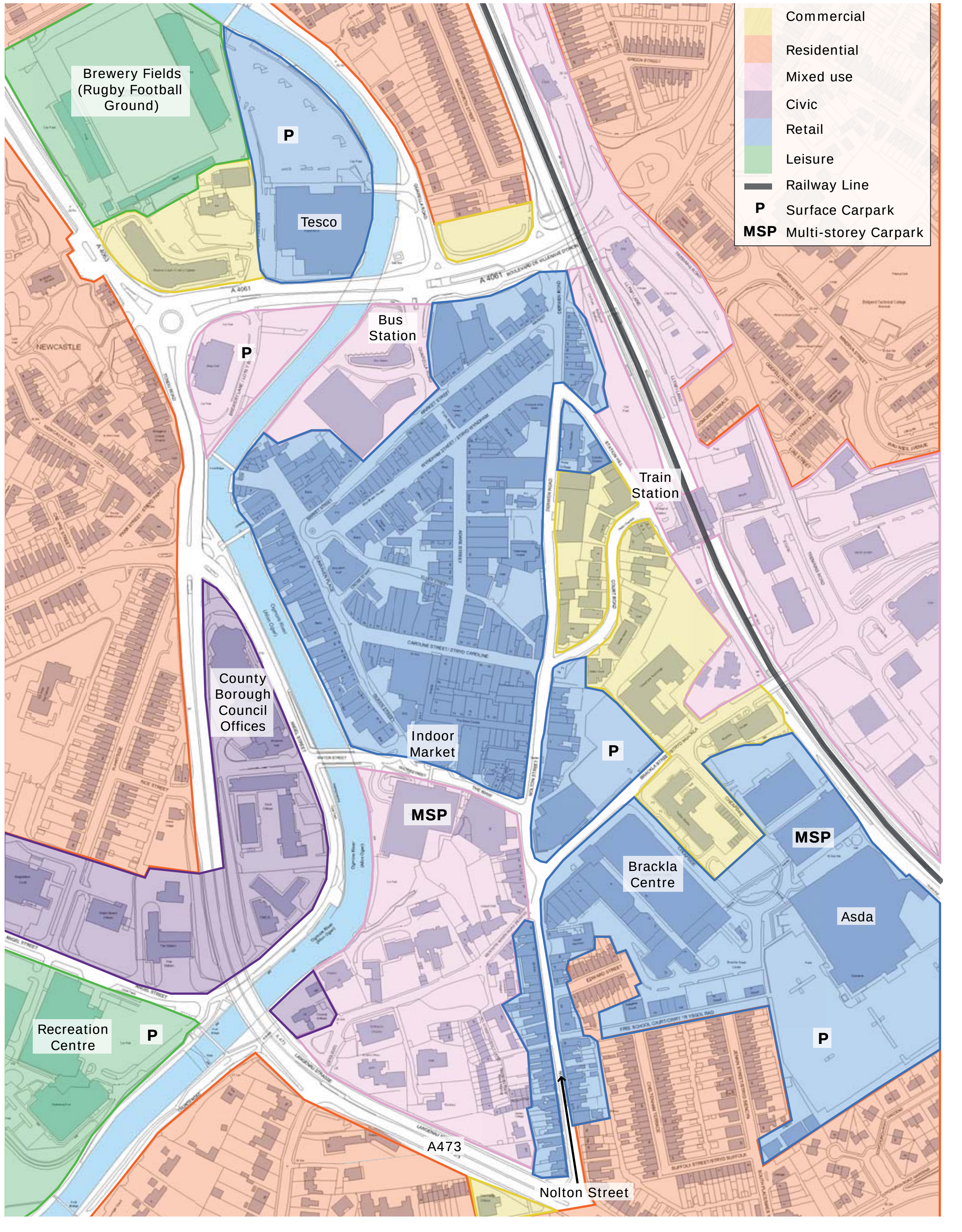
03

DESIGN PRINCIPLES & URBAN FORM

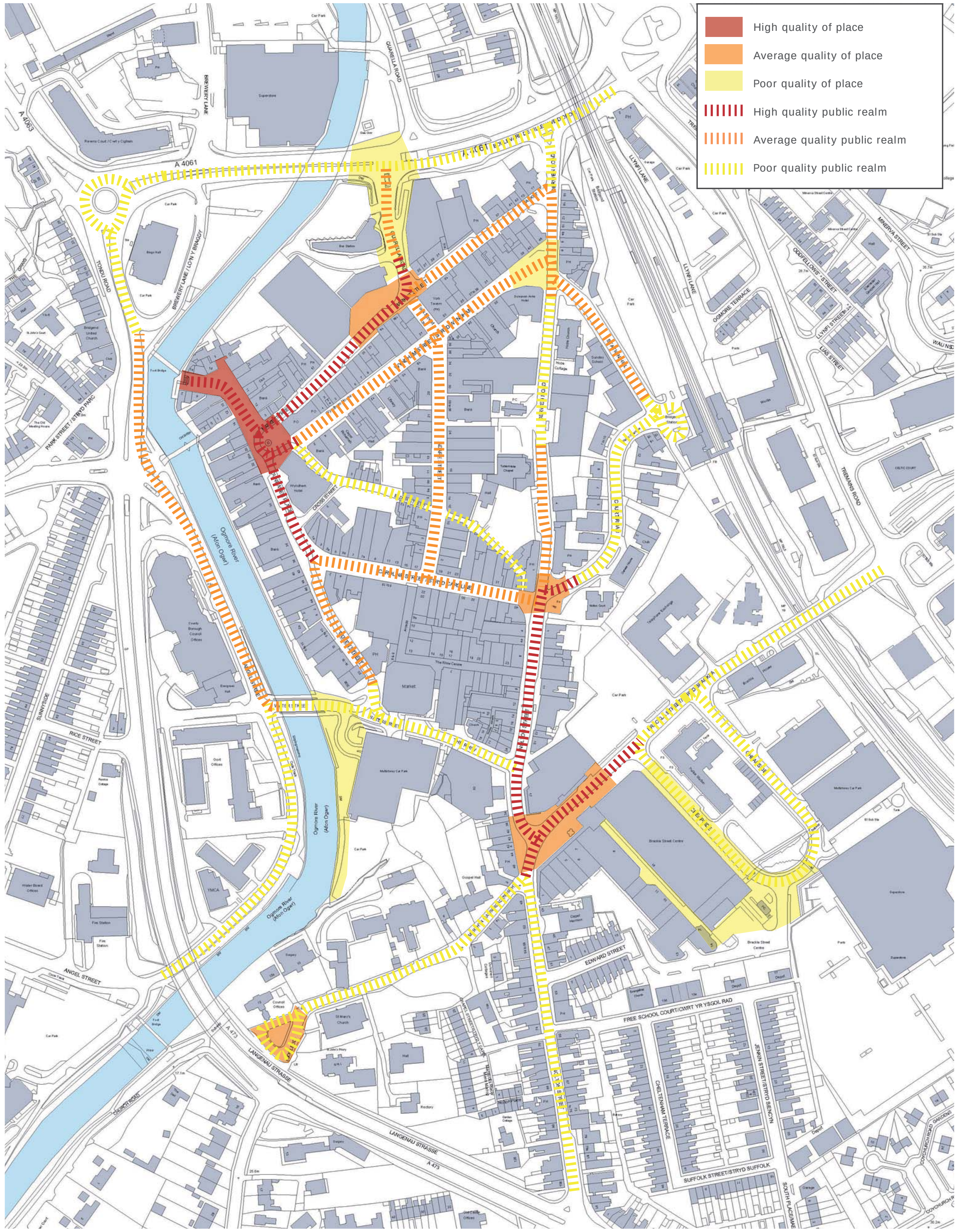
Current Land Use

- Bridgend town centre core is dominated by retail activity. The main retail core is centred on Market Street, Wyndham Street, Adare Street, Caroline Street, and the Rhiw Shopping Centre. Retail activity is also concentrated on Nolton Street, Brackla Street and the Brackla Shopping Centre.
- Immediately across the River Ogmore to the west, lies the County Borough Council Offices, Government Offices and other civic buildings. Beyond this, the predominant uses are residential which covers a large proportion of the area to the west and north of the town centre.
- In terms of commercial and office uses there is a concentration of space abutting the east side of the retail core. New office stock also exists on the northern periphery of the town centre adjacent to Tesco and the Brewery Field.
- Bridgend Recreation Centre is situated south west of the town centre and west of the River Ogmore on Angel Street. It offers a swimming pool, indoor and outdoor bowls, gymnasium and running track.
- Brewery Fields (Rugby Football Ground) is located to the northwest of the town centre, adjacent to a Tesco supermarket, complete with three covered stands and a newly refurbished Clubhouse.
- There are a number of public car parks within Bridgend town centre, including a multi-story at the Rhiw, opposite the shopping centre and indoor market, and also one immediately north of the new Asda supermarket at Cheapside.

In summary, while there are broad concentrations of retail in three areas, there is a disconnect between them which has been reinforced by the major retail stores at either end of the town centre. This tends to create a tension across the traditional retail core, rather than encouraging a flow through all three areas



Schedule of landuse



Spatial quality analysis

Spatial Quality Analysis

- There are a variety of small public spaces within the town centre core area. Each space boasts a different character and quality, as well as differing degrees of activity. Work completed under the Townscape Heritage Initiative (THI) has enhanced buildings to improve their appearance, frame public spaces and lift the overall quality of the town centre.

- Recent public realm improvements at Dunraven Place are a positive asset to the town centre and should act as a good precursor to further public realm enhancements. However, it is evident that where other public realm improvements have taken place, a piecemeal approach has lead to a slightly confused palette of materials and street furniture throughout the town centre. As part of a future strategy, improvements should aim to improve integration between areas through consistency of materials and approach.

- The plan opposite identifies those areas which are already defined public spaces (via materials, size, nature of the space, location), or places that act as natural pedestrian nodal points. The different grades in quality of public realm (quality and appropriateness of floorscape material, signage, street furniture etc) are also identified.


Court Road has a distinct character and sense of place but has poor public realm


Leftover space along the River Ogmore has the potential to be a key riverside public space

APPENDIX

03

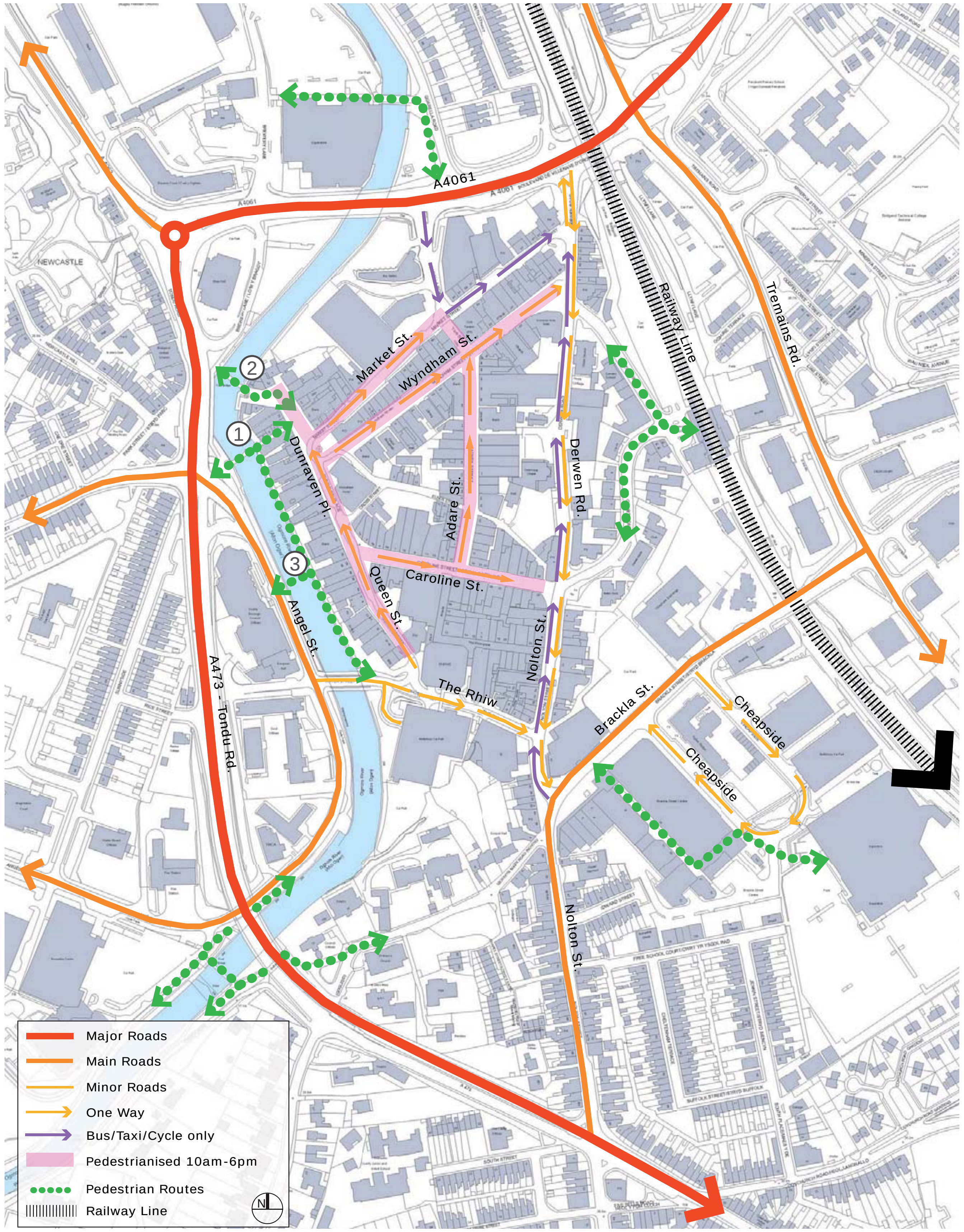
DESIGN PRINCIPLES & URBAN FORM

Town Centre Movement

- Bridgend is situated just south of the M4. From Junction 35 the approach is from the southeast along the A473 into the town centre, where signposts lead vehicular transport onto Nolton Street for parking. From Junction 36 the approach is from the north passing McArthur Glen Designer Outlet, along the A4061.
- Bridgend town centre has a number of pedestrianised or pedestrian priority streets, set around the heart of the retail area of the town. These include Caroline Street, Queen Street and Wyndham Street. Queen Street allows vehicular access from the south to service shops along the route, which then join Market Street to the north, a one way street, which converges with Derwen Road. Derwen Road is one way southbound for private vehicular transport, but allows public buses and bicycles access in both directions.
- The Rhiw and associated multi-storey car park is accessible from Angel Street on the western bank of the River Ogmore. Cheapside is also a one way circuit around the police station, passing The Brackla Street Centre, before linking back onto Brackla Street.
- Three pedestrian access points exist across the river into the town centre. These include the old 'Bridgend' bridge (1), and a new footbridge onto Dunraven Place (2), which provides an alternative to the road bridge.
- A new metalwork cantilevered boardwalk has recently being constructed which runs parallel with Dunraven Place offering an attractive riverside environment. This route links to a further footbridge adjacent to the County Borough Council Offices (3)

(1) Bridgend 'Old Bridge' linking to Dunraven Place

(3) From 'Old Bridge' towards new cantilevered boardwalk



Town centre movement

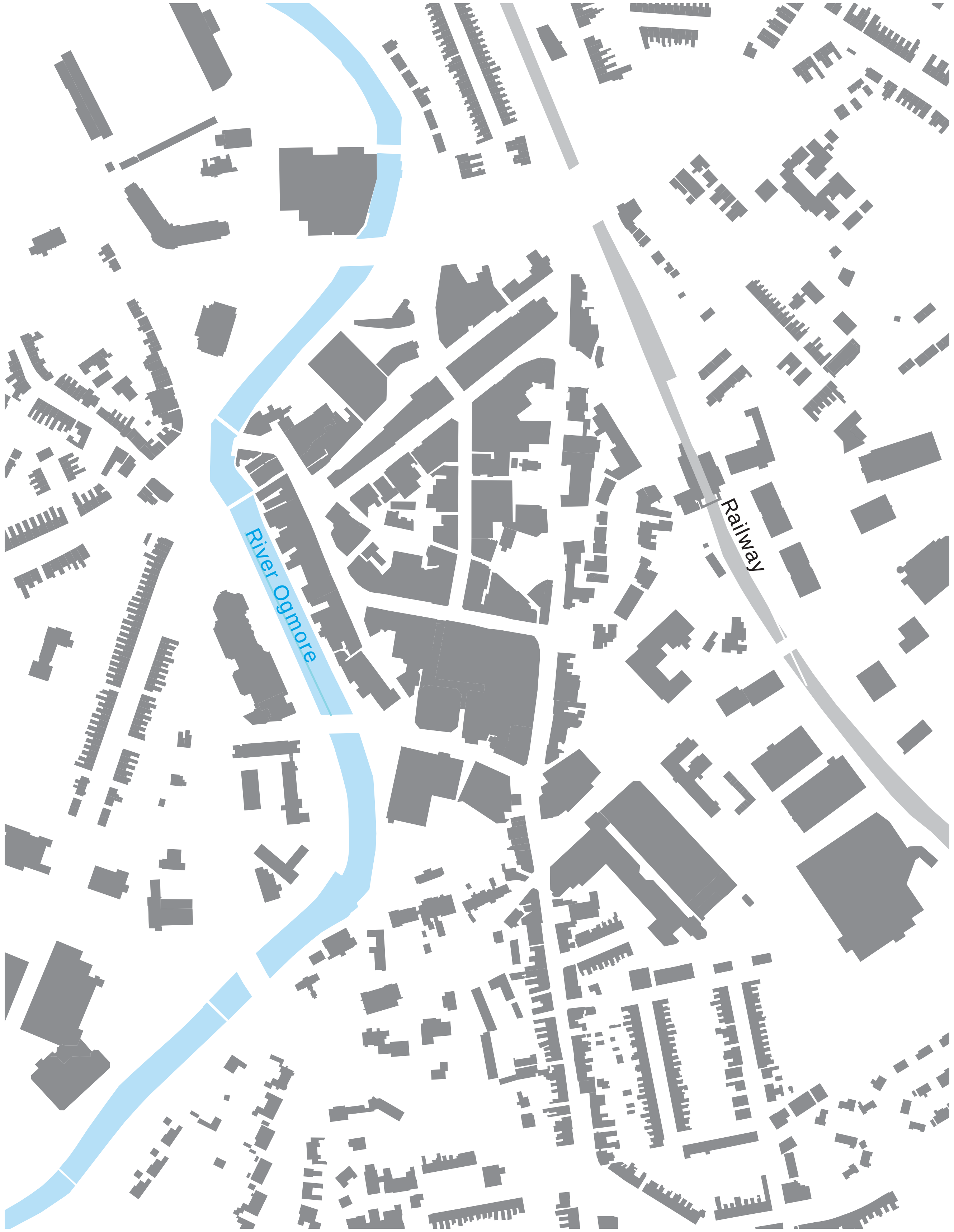


Figure ground analysis

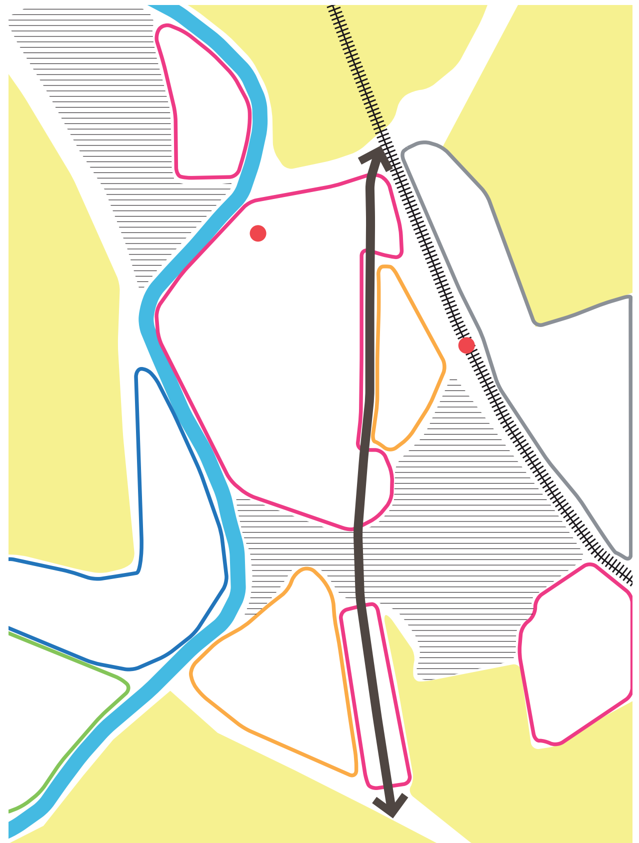
Figure Ground Analysis

The 'figure-ground' plan of the town centre clearly highlights some of the prominent features of the area:

- The historic core of the town can be clearly seen as the densely packed series of long straight streets. However, none of this historic core addresses the riverfront; instead the river seems to constrict the town centre to the west. In the same way, the railway line constricts the centre to the east.

- The pattern of streets varies across the town centre. The main retail streets intersect at all angles and there is no designated central focus to the town centre. As a result, "wayfinding" is compromised and the centre seems confusing and fragmented.

- A clear 'through route' or logical 'spine' to the town centre does exist which extends north via Cowbridge Road up through the town centre onto the A4061. However, this is currently compromised by a one way system and bus lane which diverts traffic eastwards away from the town centre.


Character areas & town centre 'spine'

Public transport interchange

Poorly defined area with no distinct character

Car Parking

Bridgend in the South Wales context is quite unique with access from three motorway junctions, the presence of the McArthur Glen designer outlet centre and tourist centres such as Ogmore by Sea and Porthcawl are located in close proximity and therefore giving access to potential visitors to Bridgend. Given the retail catchment population of circa 175,000 Bridgend is well placed to be a vibrant town centre sitting under but complementing the major neighbouring city centres of Cardiff and Swansea.

In relation to current parking provision the issues the masterplan needs to address are as follows:

Accessibility: Accessibility from three motorway junctions is undoubtedly a benefit to the town centre. That said, there is a need to increase promotion of the town centre from these key access points. The "promotion" of Bridgend town centre in this context relates to the general perception of visitors entering the town, the ease of the journey and the availability and quality of car parking. There is therefore a need to improve legibility and identity on the highway network, through advanced car parking information and directional signage.

Experience: Bridgend is no different to many similar sized towns with competing priorities of car parking utilisation, number of spaces and revenue control. The one area which also gets overlooked is the need to focus on the customer and the overall experience of parking in the town centre; this is a combination of price/payment method/spatial arrangements/decoration/perception of security. In Bridgend, the existing multi-storey car parking supply which was constructed in the early eighties has a dated and unwelcoming appearance and limited hours of operation. Recent work to widen spaces at the Rhiw car park appears to have improved the spatial arrangements providing a less cramped appearance of the car park but it has been at the expense of losing available spaces.

Competition: The introduction of the Asda store with its free car parking has shifted the concentration of pedestrian movements and parking focus to southern part of the town centre. On the basis that Asda provides free parking for 3 hours (560 spaces) the local authority run car parks have the perception of being expensive and this results in the latter currently operating at between 20% to 50% occupation. This is in comparison to the ASDA car park currently running at 80% to 90% occupation.

Payment: All car parks in the town centre are pay and display on arrival. This is in contrast to a number of similar town centres which offer a "pay on foot" service which provides greater flexibility for the visitor and can increase the amount of time spent in the town centre. Pay and display parking is mostly seen as prohibitive to encouraging shoppers and casual visitors into the town centre

Availability: In assessing quantum and pricing, one of the key factors is the availability of car parking spaces. A key issue for Bridgend is that a number of car parks are occupied by Council staff for a full day which can lead to a reduced available capacity for visitors. If the car park is at capacity, or the perception of capacity (for example if the same location/floors are used by office works) it can create a negative impact on pedestrian movements and visitor numbers. Future strategy needs to look at the balance between servicing the requirements of both the retail and office functions of the centre.

Quantum: In Bridgend, the number and quantum of car parking spaces is not seen as the key consideration at present, particularly as there is available capacity at peak times in some town centre car parks. However, if current and proposed regeneration schemes are successful, there will be a requirement for additional facilities at the right locations to serve the town.

The tables below show a comparison of the number of spaces:

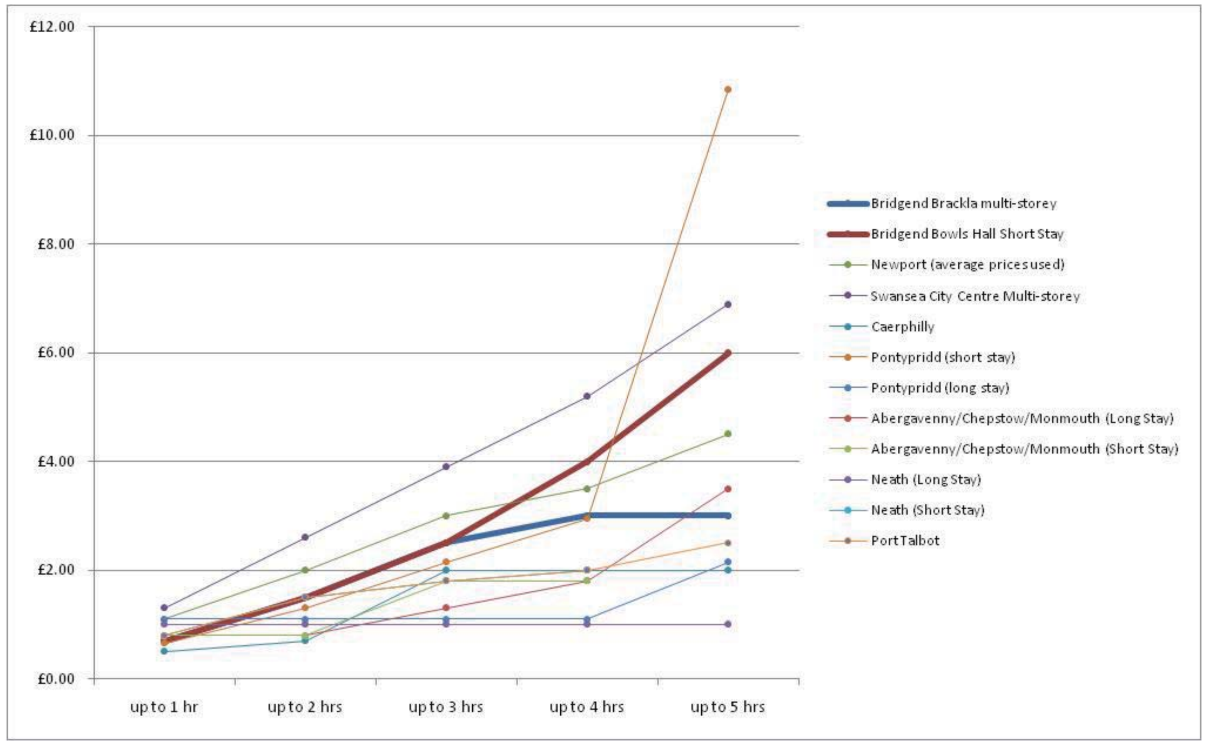
Bridgend Car Parking Provision – Summary	
Short Stay	649 spaces
Long Stay	200 spaces
Long or short stay (pay & Display)	442 spaces
Total Provision	**1,291 spaces**

Bridgend Car Parking – Breakdown of Provision		
Rhiw Car Park (Multi Storey), Water St	Short Stay / Pay & Display	320 spaces
Rhiw Car Park (Surface), Water St	Short Stay / Pay & Display	48 spaces
Brackla 3 (Surface), Brackla St	Short Stay / Pay & Display	126 spaces
Recreation Centre, Angel St	Short Stay / Pay & Display	115 spaces
Bowls Hall, (Surface) Angel St	Short Stay / Pay & Display	40 spaces
Tremains Rd (Surface), Llynfi Lane	Long Stay / Pay & Display	56 spaces
Leisure Pool (Surface), Angel St	Long Stay / Pay & Display	40 spaces
Tondu Road (Surface)	Long Stay / Pay & Display	89 spaces
Five Bells Road (Surface)	Long Stay / Free	15 spaces
Brackla Multi-storey, Cheapside	Long/Short Stay / Pay & Display	387 spaces
Bowls Hall (Surface), Angel Street	Long/Short Stay / Pay & Display	55 spaces
	Total	**1,291 spaces**

Car Parking Charges Comparison (2010)					
	up to 1 hr	up to 2 hrs	up to 3 hrs	up to 4 hrs	up to 5 hrs
Bridgend Brackla multi-storey	£0.70	£1.50	£2.50	£3.00	£3.00
Bridgend Bowls Hall Short Stay	£0.70	£1.50	£2.50	£4.00	£6.00
Newport *(average prices used)**	£1.10	£2.00	£3.00	£3.50	£4.50
Swansea City Centre Multi-storey	£1.30	£2.60	£3.90	£5.20	£6.90
Caerphilly	£0.50	£0.70	£2.00	£2.00	£2.00
Pontypridd (short stay)	£0.65	£1.30	£2.15	£2.95	£10.85
Pontypridd (long stay)	£1.10	£1.10	£1.10	£1.10	£2.15
Abergavenny/Chepstow/Monmouth (Long Stay)	£0.80	£0.80	£1.30	£1.80	£3.50
Abergavenny/Chepstow/Monmouth (Short Stay)	£0.80	£0.80	£1.80	£1.80	
Neath (Long Stay)	£1.00	£1.00	£1.00	£1.00	£1.00
Neath (Short Stay)	£0.80	£1.50	£1.80	£2.00	
Port Talbot	£0.80	£1.50	£1.80	£2.00	£2.50

ACCESS & MOVEMENT

The graph below compares Bridgend's car parking charges with Swansea, Newport, Caerphilly, Pontypridd, Abergavenny, Chepstow, Monmouth, Neath, and Port Talbot.



The graph clearly shows that Swansea City Centre Multi-storey carries the most expensive car parking charges, which is expected given the size of the centre. However, by comparison Bridgend's Bowls Hall car park is relatively expensive in comparison to other centres in South Wales (although this car park also has bays which provide long stay for only £3). For example the Newport average is considerably cheaper for the longer durations. Bridgend Brackla multi-storey is generally on a par with the parking charges you would expect for Bridgend when compared to the other centres shown in the graph however is more expensive than Newport at the 4 hours parking rate. One of the key issues is that a number of these centres offer a pay on foot regime rather than pay and display to maximise convenience and flexibility.

Newport are implementing reduced charges in council surface pay and display car parks as soon as possible in the New Year – when a charge of only 10p will apply for the first two hours. The reduced parking charge will run on a trial basis with a review after three and six months, and the effects discussed with traders. The nominal charge of 10p in surface pay and display car parks will prevent significant delays and eliminates further costs that would apply installing new ticket machines across the city. Newport have identified the reduction in charges will have a potential cost of over £700,000 a year in lost income, but will act as a catalyst to drive up footfall. This is part of the package of measures that Newport are implementing to continue to drive forward both long and short-term solutions that will benefit the people of Newport, visitors and businesses alike. Bus services in Newport will also be re-routed in a bid to increase footfall at the High Street end of the city.

The approach of successful market towns has been to offer easy access and a range of "interesting or niche" shops not offered by major regional centres. Quality car parking "at the right price" will also be needed to attract people who are "just popping into town" for half an hour or so. Car parking provision, quality and charges can be key to economic consequences and to the dynamics of the well-being of the high street.

The master plan therefore needs to address a number of these issues and outline recommendations for achieving the most appropriate parking strategy for Bridgend. Free parking provided by the private sector, for example Tesco and Asda also play an important role in the town, and impact on utilisation of pay parking for short visits. Local traders also indicate that it reduces dwell time, as shoppers restrict themselves to the allowable free time.

Signage - Street Furniture - Street Cleansing

Bridgend's image and the quality of its urban environment are vital to its local economy and its regional standing because shoppers and visitors travel more often and further afield. It is therefore important for a town centre to be easily accessible and have a high quality environment.

As outlined earlier, in the town centre there have been a number of recent initiatives to improve the environment. Like a number of other town centres, Bridgend does suffer in places from a confusion and legibility within its urban environment such as:

1. Bridgend has the positive benefit of access from three motorway junctions. This factor is a huge opportunity for the town centre but there are limited tourist information signs from these access points to identify the town centre, its attractions and to reinforce Bridgend as a destination.

2. A low level of information is provided with destinations and routes being "erratically" signposted. This is also the case for signage in respect of the bus station, railway station or at any of the town's car parks.

3. Even though improvement have been made through pedestrianisation, the central retail area is difficult to navigate whether travelling on foot, by public transport or by car. The existing signage fails to give people comfort or guide them to the attractions that are on offer.

4. Bridgend lacks a strong visual identity and sense of arrival when entering on the key highway routes. This lack of visual identity affects the town's ability to distinguish itself from competing destinations.

5. There is limited central seating for shoppers and tourists at key town centre locations.

6. The surfacing material on a number of pedestrian areas in the town centre requires maintenance and there is a proliferation of unnecessary surplus street furniture.

This masterplan and the Parking Strategy therefore need to address a number of these issues and outline recommendations for enhancing the town centre experience.