



Bridgend Retail Study Update

Main Report

On behalf of **Bridgend County Borough Council**



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1 Introduction

1.1 Background

- 1.1.1 Stantec was commissioned by Bridgend County Borough Council ('BCBC') in February 2022 to undertake a concise Retail Study Update focusing on specific matters, to inform the ongoing review of the adopted Bridgend Local Development Plan ('the LDP Review').
- 1.1.2 The Retail Study Update, which covers the 2018-2033 plan period and forms a key evidence base document to inform the LDP Review and the production of a replacement LDP, sets out evidence-based recommendations on retail need to inform emerging policies.

1.2 Purpose and objectives

- 1.2.1 The purpose of this report is to contribute to the LDP Review evidence base by examining retail need within the BCBC area. The specific objectives for the Retail Study Update are set out below:
 - Analyse trends affecting the retail sector which may impact and influence local retailing within the borough and how this may change over time.
 - Assess future needs for comparison and convenience retail floorspace to 2033, based on existing market shares.
 - PBA (now Stantec) produced a Retail Study on behalf of BCBC in 2019. Following this update and forthcoming examination of the LDP Review, it is important that we set out why Stantec's methodology remains robust.

1.3 Report structure

- 1.3.1 Responding to the objectives identified above, our report is structured as follows:
 - **Section 2** sets out key market and economic trends in the retail sector.
 - **Section 3** assesses the quantitative need for additional retail floorspace in the comparison (non-food) and convenience (food) sectors.
 - **Section 4** sets out why our methodology remains robust.
- 1.3.2 We provide our Updated Retail Capacity Tables at **Appendix A**.

2 Market and Economic Trends

2.1 Market Trends

Introduction

- 2.1.1 There has been ongoing restructuring in the retail and commercial leisure market since the global financial crisis in 2009. Online sales have continued to rise, most retailers are building less retail floorspace, operators have found that less existing floorspace is required and existing floorspace is being converted into alternative uses. The COVID-19 global pandemic has accelerated and will continue to accelerate these trends. High streets in the UK were initially forced to close in March 2020, and again following several temporary easings of restrictions. Whilst high streets have now re-opened, some retailers have not returned, or have rationalised their store portfolio.
- 2.1.2 Previous rules on social distancing and Government guidance to work from home, the latter of which only ended in late January 2022, has led to reduced custom. At present, some shops still request customers to wear face coverings upon entry, and many employers have moved to 'hybrid' working patterns, with employees able to work from home for several days each week. These factors have and will continue to create enormous challenges for town centres. Just maintaining pre-COVID-19 levels of existing vitality and viability of town centres should be the objective for all but a handful of town centres. Below, we discuss the key trends of the last few years; we set out the main economic recovery scenarios; and we predict the likely implications of the COVID-19 pandemic.

Brexit

- 2.1.3 In 2019 the UK economy grew at its lowest rate in seven years, which was largely attributed to the uncertainty surrounding Brexit negotiations and a weaker global economy. The small growth in the UK economy was reflected in consumer spending, which only increased by 1.2 per cent, the smallest increase in eight years¹. Low consumer confidence and lacklustre income growth was blamed for the disappointing growth in consumer spending.
- 2.1.4 It is anticipated, however, that there will be an orderly adjustment to the new trading environment in which enhanced customs checks will become commonplace². As Brexit-related uncertainty ends, business investment is expected to rebound in 2022. Despite this, the long-term economic consequences of Brexit will depend on how the UK-EU's new trading relationship evolves.

Retail Sales

- 2.1.5 Retail sales volumes decreased by 1.4 per cent in March 2022, following a decrease of 0.5 per cent in February 2022³. However, retail sales volumes were 2.2 per cent above those recorded in February 2020, before the onset of the COVID-19 pandemic. Non-store retailing was largely responsible for the decrease in sales volumes, having decreased by 7.9 per cent during March 2022 following a decrease of 6.9 per cent the month before. Despite this, retail sales volumes were 20.3 per cent above those in February 2020.
- 2.1.6 Retail sales volumes increased significantly upon the opening of non-essential retail in April 2021 and remained high during the first half of 2021 before diminishing as consumers spent less on durable goods and more in areas of the economy that had, up until that point, been 'locked down', such as travel and leisure.
- 2.1.7 In 2022, spending growth is expected to weaken as economic conditions worsen. With inflation hitting 7 per cent in April 2022 and National Insurance contributions and energy prices

¹ Experian, Retail Planner Briefing Note 17, February 2020

² Experian, Retail Planner Briefing Note 19, January 2022

³ Office for National Statistics, Retail sales, Great Britain: March 2022, April 2022

on the rise, there will be increased cost pressures which will reduce consumer spending power. The cost-of-living crisis in the UK has been compounded by the Russia-Ukraine war in which fuel prices have soared and food chains have been disrupted.

Store Closures

- 2.1.8 Table 1-1 below shows the net changes in Great Britain's ('GB') retail units per year from 2013-2021. In 2021 there was a net loss of 7,902 retail units across GB⁴. Table 1-1 shows this is a departure from the trend of a net loss of retail units by an ever-increasing amount between 2014 and 2020.
- 2.1.9 It should be noted that 2019 was the first year when there was an increase in store openings, since 2013, but the relatively small increase in store openings was outweighed by the much larger increase in store closures. In contrast, the increase in store openings in 2021 massively outweighed the increase in store closures.
- 2.1.10 There was a significant decrease in the number of store openings in 2020 but there was also a significant decrease in the number of store closures, down 6.8 per cent on the previous year. There are two reasons for this; first, Government support schemes including the business rates holiday and protection from evictions effectively froze the property sector. This enabled most retailers to survive as landlords were forced to forego rental payments in some instances. Second, the temporary closure of 'non-essential' retail depressed closures as well as openings with total activity (openings and closures) down by 9.6 per cent compared to 2019⁵.
- 2.1.11 There was a significant increase in the number of store openings in 2021, demonstrating a continued appetite for physical retail. A total of 43,167 new units opened across GB which represents a 10.5 per cent increase on the previous year. The number of store closures also rose in 2021, with a loss of 51,069 units, an increase of 690 units on the previous year. However, this 1.4 per cent increase in store closures is small in comparison to the 10.5 per cent increase in store openings.
- 2.1.12 The data below shows there were 51,069 store closures in 2021, which is an increase of 7.6 per cent when compared with the number of store closures in 2013. Between 2013 and 2021, the net change in UK retail units was minus 41,491, which is clearly a substantial loss of retail units.

Table 1-1 Net change in UK retail units by year 2013-2021

Year	Store Openings	Store Closures	Net Change in UK Retail Units
2013	49,496	47,456	2,040
2014	47,624	47,514	110
2015	47,042	47,380	-338
2016	45,986	47,636	-1,650
2017	45,274	50,767	-5,493
2018	43,278	50,828	-7,550
2019	44,883	54,052	-9,169
2020	39,060	50,379	-11,319
2021	43,167	51,069	-7,902
2013-2021	405,810	447,081	-41,491

- 2.1.13 Across all retail location types – town centres, retail parks and shopping centres – there has been an increase in the net loss of retail units and vacancy rate. However, the vacancy rate in

⁴ Local Data Company, GB Retail and Leisure Market Analysis Full Year 2021

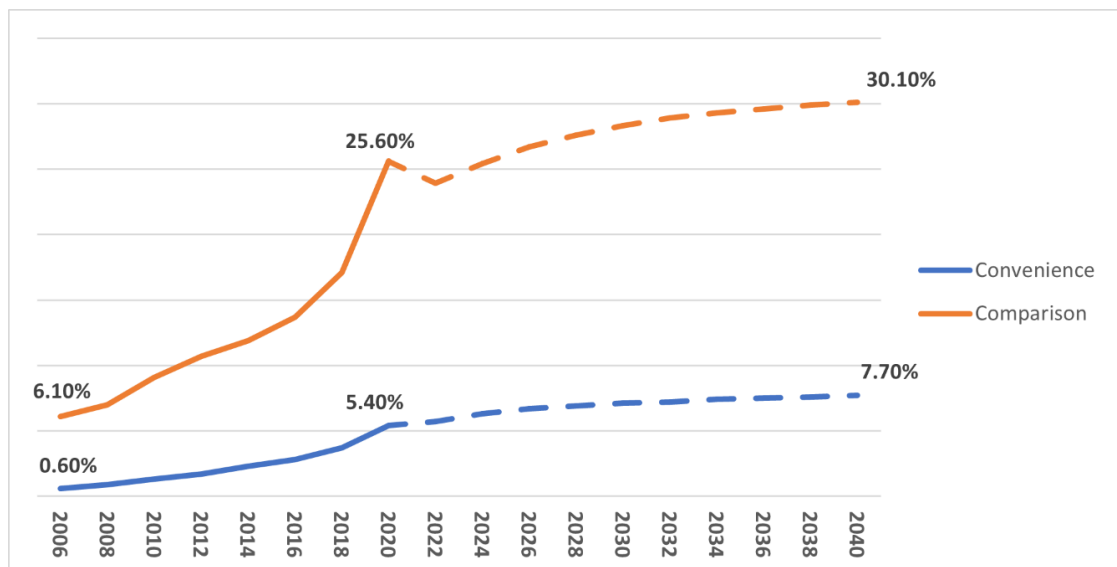
⁵ Local Data Company, GB Retail and Leisure Market Analysis Full Year 2020

retail parks (11.3 per cent) is significantly lower than the high street and shopping centres (14.4 per cent and 19.1 per cent, respectively). Shopping centres have suffered during the pandemic as nearly a fifth of their units are occupied by fashion and general clothing stores, both of which are considered non-essential retail. Moreover, the closure of anchor stores has led to the loss of smaller stores in areas where footfall has drastically reduced⁶.

Online Shopping/Special Forms of Trading

- 2.1.1 Figure 1-1 shows the market share of special forms of trading ('SFT', which includes online shopping) in both the convenience and comparison retail sectors up to 2020 and projected forward to 2040. Experian defines SFT as any non-store retailing including internet sales, mail order sales, market stalls, vending machines and door-to-door selling. Internet sales account for a large proportion of SFT.
- 2.1.2 Unsurprisingly, Figure 1-1 identifies that the market share of SFT in both the comparison and convenience retail sectors is forecast to increase significantly. However, the rate at which it is increasing within the comparison goods retail sector is much higher than in the convenience goods retail sector. This is because foodstore operators find it difficult to make online shopping profitable. Experian predicts that, by 2040, SFT will account for nearly a third of the comparison goods retail sector. The obvious implication of this is that less comparison retail floorspace will be required.

Figure 1-1 Figure 5, Appendix 3, Experian Retail Planner Briefing Note 19 (January 2022)



- 2.1.3 Generally speaking, the performance of the high street retail sector is weakening. Where necessary, some consideration should be given to condensing and concentrating the retail offering in Bridgend County Borough's town centres. Consideration should also be given to introducing and expanding alternative uses in the town centres, including small-medium scale residential and offices in peripheral areas of each town centre.

Commercial Retail Rents

- 2.1.4 Due to the supply of retail space massively outstripping demand and the impact of successive lockdowns, the retail market has experienced a significant decrease in rents, with some having fallen as much as 50 per cent since their peak in the 2000s⁷. This has given new operators the chance to open stores in locations that were previously too expensive. While this pressure on retail rents will continue, there are signs that rents in some stronger locations

⁶ Local Data Company, Looking Beyond Lockdown: GB Retail and Leisure Market Analysis H1 2021, September 2021

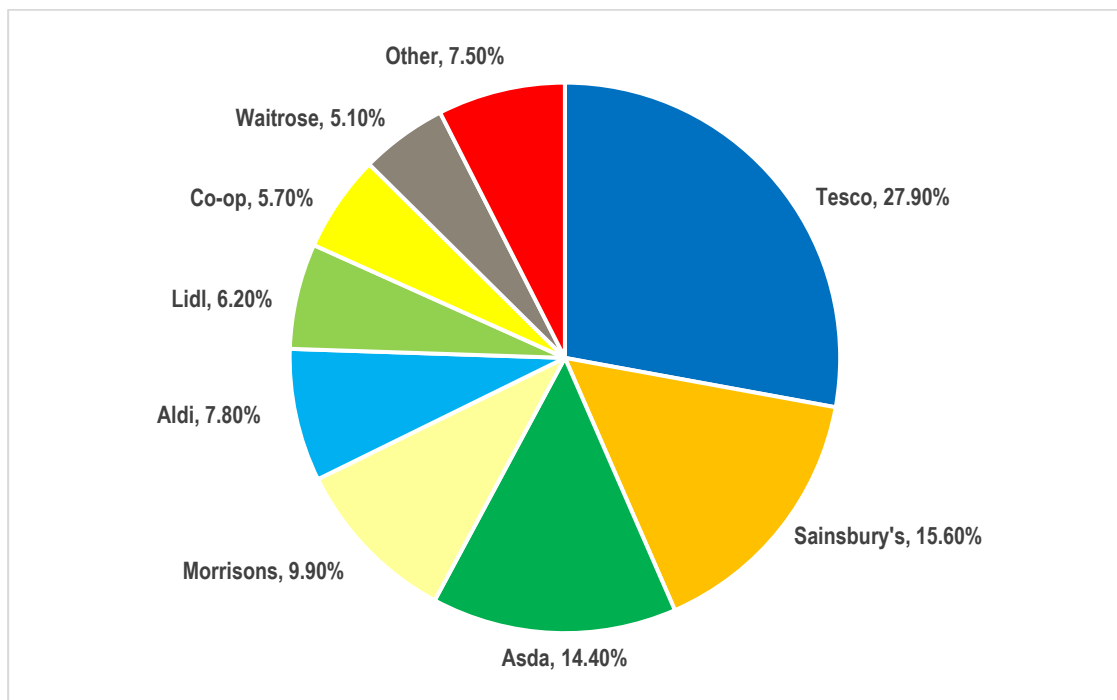
⁷ Colliers International, Midsummer Retail Report 2021

are stabilising as occupiers settle with the new terms available. In addition, turnover rents, where rents are aligned with an occupier's turnover, are becoming more prevalent throughout the retail sector.

2.2 Convenience Retail Sector

- 2.2.1 Prior to the global financial crisis, the convenience goods retail sector was a key driver of growth in the retail sector. The 'Big Four' supermarket operators (Asda, Morrisons, Tesco and Sainsbury's), which have traditionally dominated the market, were building and operating increasingly larger stores and expanding the range of services that they provide (particularly in terms of comparison retail goods). Whilst many of these larger stores were built outside of town centres, new large foodstores also often served to anchor re-development schemes within smaller town centres.
- 2.2.2 Since the global financial crisis, the market dominance of the 'Big Four' has been increasingly challenged, both by higher-end operators, such as Waitrose and Marks & Spencer (Simply Food and Foodhall formats), and value/discount retailers, primarily Aldi and Lidl. In particular, the value retailers have posted significant year-on-year growth over recent years and they have emerged as important forces in the convenience goods retail sector. Expenditure on convenience goods had been falling in recent years due to increasing competition between operators (leading to a reduction in prices and low inflation).
- 2.2.3 Figure 1-2 shows the UK grocery market share. This shows that whilst the 'Big Four' operators still account for two-thirds of the convenience retail market share, their dominance is being challenged by Aldi and Lidl, in particular. Aldi's market share is now only two percentage points lower than that of Morrisons.

Figure 1-2 UK Grocery Market Share (23 January 2022)



Source: KANTAR

- 2.2.4 There has been an increasing move by the major convenience goods retail operators away from opening larger-format stores towards smaller supermarkets and establishing a network of 'top up' convenience goods shopping facilities. These smaller-format stores are often located in town centres, or district/neighbourhood shopping parades. The shift has been driven by changing consumer behaviour; shoppers are undertaking an increasing number of smaller 'top-up shopping' or 'basket shopping' trips instead of a weekly food shop at a large out-of-centre foodstore. Amazon Fresh opened its first 'till-less' grocery store in west London in early

2021. Since then, a number of shops have opened up in the city. These shops enable customers to pick their goods and leave without having to visit a till. Similarly, Lidl has announced plans to open convenience goods stores in London.

- 2.2.5 One of the reasons which explains why retailers such as Aldi and Lidl have increased their market share over recent years is because they have successfully diversified their offers to include more premium products, thereby appealing to new categories of customers. Those retailers are no longer really 'discount operators' in the way they were 10 or more years ago, and they have effectively become mainstream foodstore operators. In contrast, Morrisons and Asda have recently announced that they are competing on price, in light of high inflation in 2022.
- 2.2.6 In order to compete with the likes of Aldi and Lidl, Tesco opened its Jack's discount chain in 2018. Less than four years later, Tesco announced that it was closing all 13 Jack's stores. Six of the branches were converted into Tesco superstores while the remaining seven closed indefinitely.
- 2.2.7 Both Sainsbury's and Tesco now have more convenience stores than large supermarkets and superstores. These operators have withdrawn proposals for the development of new superstores and from town centre redevelopment projects in recent years. In the last few years both Tesco and Morrisons have closed dozens of 'unprofitable' foodstores (with Morrisons also disposing of its portfolio of convenience stores to concentrate on its core business, demonstrating the complexity of changes within the market).
- 2.2.8 By way of comparison, Aldi and Lidl have investment plans to open more than 100 stores on an annual basis. Store formats are also evolving with new Aldi and Lidl foodstores now providing more floorspace than previous formats, along with the introduction of new facilities such as in-store bakeries.

2.3 Comparison Retail Sector

- 2.3.1 Over the last few years there have been many notable failures and company restructurings within the comparison goods retail sector, including Dawsons Music, T M Lewin, Victoria's Secret, Jessops, Paperchase, Debenhams and Arcadia. Furthermore, the impacts of COVID-19 have led to some major operators not returning to the high street such as Topshop.
- 2.3.2 Whilst the circumstances impacting each of the retailers are specific to them, there are a couple of common themes which have led to companies failing or needing to restructure. These include:
- **Relevance** – the format of certain retailers is becoming less relevant, a good example of this being Toys R Us. Due to the size of the stores, Toys R Us found itself competing against larger retailers such as foodstores and the likes of Argos. As Toys R Us was a specialist retailer, it was unable to change the type of goods being sold within its stores (in the way that supermarkets and catalogue retailers can) and therefore Toys R Us could not react to the market change as freely. Toys R Us also had to compete against large online retailers, such as Amazon, which can offer goods at cheaper prices due to lower overheads.
 - **Over-expansion** – some retailers over-expanded in the early 2000s and have not been able to respond to the growth in online retailing and decline in high street retailing. A good example of this is Maplin, which experienced rapid growth but found that its specialist product was more tailored to an online audience.
- 2.3.3 Identifying the success of online retailing as the main reason for the decline in high street retailing may be premature. Whilst it is a common view that the prevalence of online retailing will increase, it would be naïve to dismiss the role of the high street and multi-channel retailing. Often the most successful online brands are built from their reputation on the high street (a good example being John Lewis).

2.4 Commercial Leisure

- 2.4.1 The restaurant sector has been feeling the effects of the 'casual dining crunch' in recent years. The number of insolvencies jumped from 296 in the third quarter of 2021 to 354 in the last

quarter of 2021, representing a 20 per cent increase. This is the highest level since the pandemic began.

- 2.4.2 The reduction in consumer spending and rising costs due to the devaluation of the pound and the uncertainty of Brexit negotiations is blamed for the increase in insolvencies. There was also a rapid growth of the casual-dining sector following the global financial crisis which has led to an over-saturation of the market. We envisage that there will be further restaurant closures, particularly amongst large chains.
- 2.4.3 The intermittent closure of the casual dining sector during the COVID-19 pandemic is partly responsible for the boost in fast-food takeaways, which is now the fastest growing category nationally. Many fast-food takeaways have expanded their estate to cater for increased demand and to take advantage of favourable trading conditions.
- 2.4.4 Many consider spending on leisure to be discretionary and therefore it is likely to be in line with the performance of the UK economy. Table 1-2 shows average weekly household spending on leisure between 2009 and 2020. It is worth noting that the 2009 data coincided with the start of the global financial crisis, 2014 was prior to the Brexit vote and data from the financial year ending 2020 are the latest available figures, the period immediately prior to the COVID-19 pandemic.

Table 1-2 Average Weekly Household Spending Data 2009-2020

Spending Category	2009 (£)	2014 (£)	2020 (£)	Percentage change (2009-2020)
Cinema, theatre and museums etc.	2.30	2.80	3.30	43.5
Admissions to clubs, dances, disco and bingo	0.50	0.50	0.80	60
Restaurant and café meals	13.30	16.60	20.20	51.9
Takeaway meals and other snack food	8.00	8.80	10.90	36.3
Gambling payments	4.10	2.90	2.40	-41.5
Sports admission, subscriptions, leisure class fees and equipment hire	5.00	6.90	7.80	56

Source: ONS, Family Workbook Spending, March 2021

- 2.4.5 The average weekly household spend has increased across all of the sub-categories with the exception of gambling payments. There has been a significant growth in spending on sports admission subscriptions and leisure class fees, which has been largely led by a doubling of spending on subscriptions to sports and social clubs, which reflects the growth in the discount gym market.
- 2.4.6 There has also been a significant increase (51.9 per cent) in spending on restaurant and café meals since the start of the global financial crisis. The decrease in gambling payments (-41.5 per cent) is largely led by a significant fall in spending at bookmakers.

2.5 Impacts of Covid-19

- 2.5.1 With three national lockdowns and some form of restrictions on economic life for almost two years, the short-term impacts of the global pandemic on retail have been stark. In 2020, total

retail sales volumes fell by 1.9 per cent compared with 2019, the largest annual fall on record⁸. A number of national multiple retailers were forced to restructure or enter administration, including Clarks, Debenhams, Oasis, Warehouse, Cath Kidston and Brighthouse. In contrast, independent retailers have fared more favourably during the pandemic. In fact, independent retailers grew by 804 units in the first half of 2021⁹. This growth can be attributed in part to government support measures, business rates relief and the moratorium, all of which enabled them to remain operational.

- 2.5.2 New hybrid working models are likely to remain in the short to medium future which is having a notable impact on city centres. Central London has fared worse than regional town centres as the large number of workers have spent more time and money in local residential areas / local centres¹⁰.
- 2.5.3 The long-term impacts of the global pandemic on consumer spending and behaviour is far more difficult to predict. However, some patterns are beginning to emerge which may impact the future of retail and leisure in the UK. There has been a significant increase in online retailing, especially in the convenience goods sector. Tesco alone has doubled its online capacity to one million orders a week. The amount being spent by over-65s on food deliveries doubled in April 2020.
- 2.5.4 Interestingly, Marks & Spencer has announced that 365,000 existing customers have used the company's website for the first time and a further 315,000 had either tried it out or returned as shoppers. Steve Rowe, Chief Executive of Marks & Spencer, considers that the global pandemic will speed up the switch from the high street to the internet and trigger big shifts in how people shop, dress and eat. Marks & Spencer has experienced a significant decrease in sales of formalwear and a significant increase in casualwear, which reflects the movement of working from home.

2.6 Potential Economic Scenarios

- 2.6.1 As well as outlining 'the central forecast' scenario for the UK's macro-economic performance following the global pandemic, Experian has put forward three alternative scenarios, namely 'Optimistic scenario' (30 per cent probability), 'Downside Brexit scenario' (20 per cent probability) and 'Reintroduction of Plan B Measures' (10 per cent probability)¹¹.
- 2.6.2 The central forecast assumes that there will be no further public health restrictions and therefore the economy can continue to recover largely undisturbed. However, increased uncertainty and volatility have been factored into this forecast due to supply chain disruptions (resulting from successive lockdowns), geopolitical tensions and rising inflation. A 40 per cent probability is attached to the central forecast in which annual growth in Gross Domestic Product ('GDP') is expected to average 1.8 per cent between 2021 and 2040.
- 2.6.3 The alternative scenarios assume that the pandemic will be more long-lasting. Like the central forecast (the base case), the optimistic scenario is based on the premise that no further restrictions are imposed following the listing of 'Plan B' measures at the end of January 2022. The optimistic scenario also assumes that the uptake of COVID-19 booster vaccines will remain high and that the economy will continue to recover in 2022, and outperform the base case economic projections. Moreover, rising inflation is somewhat offset by better supply conditions given the less disruptive nature of the Omicron variant. Experian has also assumed that the Bank Rate will rise slightly more than in the base case. The optimistic scenario assumes that consumers will respond more positively to these favourable conditions than in the base case and have more purchasing power as a result of saving during lockdowns. In the long-term, scarring to the labour market is minimal, and GDP is less than 1 per cent lower than in Experian's pre-pandemic base case.

⁸ ONS, Impact of the coronavirus (COVID-19) pandemic on retail sales in 2020, February 2021

⁹ Local Data Company, Looking Beyond Lockdown: GB Retail and Leisure Market Analysis H1 2021, September 2021

¹⁰ Local Data Company, Looking Beyond Lockdown: GB Retail and Leisure Market Analysis H1 2021, September 2021

¹¹ Experian, Retail Planner Briefing Note 19, January 2022

- 2.6.4 In light of the introduction of full checks on UK imports in January 2022, the central forecast assumes there will be a smooth transition towards a new comprehensive trading relationship. However, the 'Downside Brexit scenario' does not discount the possibility of further economic fallout resulting from increased trade barriers and stricter rules surrounding migration, the impact of which would dampen business confidence, expose Sterling to further declines, lead to higher inflation and put more pressure on household income. The UK's growth would be hampered, resulting in weaker investment and productivity.
- 2.6.5 The 'Reintroduction of Plan B Measures' scenario assumes that COVID-19 cases and hospitalisations will begin to rise again. With temporary restrictions in place, businesses would face renewed pressure and, in the absence of Government support schemes such as the furlough scheme, unemployment would peak at 6.2 per cent in the second quarter of 2022. Experian has assumed that when restrictions are lifted, businesses would be less in favour of hiring new staff given profitability concerns. Compared to the base case, unemployment levels would decline at a slower rate during the second half of 2022. This pessimistic scenario assumes that it will not be until the final quarter of 2022 that GDP is back to pre-pandemic levels on a quarterly basis.
- 2.6.6 It is important to emphasise that these are only initial forecasts of the possible impact of the global pandemic and it will be important to continue monitoring UK economic performance to have a good understanding of how town centres across the UK are affected, particularly in light of high inflation and the Russia-Ukraine conflict.

2.7 Centres in Bridgend County Borough and the Surrounding Area

- 2.7.1 This Retail Study Update adopts the same study area as the one used for the household retail survey carried out by NEMS Market Research in February 2019, which identified patterns of comparison and convenience retail spending across the study area.
- 2.7.2 The study area is shown in Figure 1-3 below. The study area comprises eight study zones. Zones 1-4 align within BCBC's administrative boundary and zones 5-8 extend into neighbouring local authority areas. The wider study area has been adopted to identify the role of BCBC's centres within the sub-region and establish the core catchment of each centre.

Figure 1-3 Study area



Venuescore

- 2.7.3 The Javelin Group's Venuescore ranks over 3,500 retail destinations across the UK including town centres, malls, retail warehouse parks and factory outlet centres (individual 'out-of-centre' stores are not included). Each destination is given a weighted score based on the number of multiple retailers present, including anchor stores, fashion operators and non-fashion multiples. The score assigned to each retailer is weighted depending on their overall impact on shopping patterns; for example, a department store will achieve a high score. The scores relate to each shopping destination.
- 2.7.4 The Javelin information is widely used in the retail industry to assess the relative strength of shopping destinations. The results for Bridgend County Borough and other relevant centres outside of but close to the borough are shown in Table 1-3.

Table 1-3 Venuescore UK Shopping Index and UK Rank

Shopping Destination*	Location Grade	Venuescore	UK Ranking	Market Position
Cardiff	Major City	512	9	Upper Middle
Swansea	Regional	209	80	Middle
Newport	Regional	174	122	Middle
Cwmbran	Regional	149	157	Lower Middle
Bridgend Designer Outlet	Sub-Regional	99	267	Upper Middle
Neath	Sub-Regional	91	297	Lower Middle
Bridgend	Major District	73	390	Lower Middle
Port Talbot	Major District	63	460	Lower Middle
Caerphilly	Major District	61	480	Lower Middle
Barry	Major District	50	615	Lower Middle
Maesteg	District	37	858	Lower Middle
Cowbridge	Minor District	24	1,322	Upper Middle
Porth	Minor District	23	1,372	Lower Middle
Porthcawl	Minor District	21	1,486	Lower Middle
Pontypridd Retail Park	Local	19	1,618	Middle
Tonypanyd	Local	18	1,709	Lower Middle
Treorchy	Local	16	1,908	Lower Middle
Pencoed	Local	11	2,827	Lower Middle
Pyle	Local	10	3,152	Lower Middle

Source: Venuescore, Javelin Group 2015/16

*Aberkenfig (Valleys Gateway) and Tonyrefail do not feature in Venuescore's list of retail destinations

- 2.7.5 Residents in Bridgend borough have good access to several large centres including Cardiff, Swansea, Newport and Cwmbran, as well as having a choice of smaller centres to meet their day-to-day needs such as Porthcawl, Pencoed and Pyle.
- 2.7.6 Cardiff City Centre is at the top of the hierarchy in the sub-region with a Venuescore of 512 and is ranked 9th in the UK. Swansea City Centre follows with a Venuescore of 209 and ranked 80th in the UK, followed by Newport with a Venuescore of 174 and ranked 122nd in the UK. Cardiff is classed as a 'Major City' centre and both Swansea and Newport are classed as 'Regional' centres.
- 2.7.7 Bridgend and Port Talbot are classed as 'Major District' centres. Bridgend has a Venuescore of 73 and is ranked 390th in the UK. Port Talbot has a Venuescore of 63 and is ranked 460th in the UK.
- 2.7.8 Maesteg is classed as a 'District' centre. It has a Venuescore of 37 and is ranked 858th in the UK.
- 2.7.9 Cowbridge, Porth and Porthcawl are classed as 'Minor District' centres. Cowbridge has a Venuescore of 24 and is ranked 1,322nd in the UK. Porth has a Venuescore of 23 and is ranked 1,372nd in the UK. Porthcawl has a Venuescore of 21 and is ranked 1,486 in the UK.

- 2.7.10 Tonypany, Treorchy and Pyle are classed as 'Local' centres. Tonypany has a Venuescore of 18 and is ranked 1,709th in the UK. Treorchy has a Venuescore of 16 and is ranked 1,908th in the UK. Pyle has a Venuescore of 10 and is ranked 3,152nd in the UK.
- 2.7.11 Aberkenfig (Valleys Gateway) and Tonyrefail have few national multiples and are not included within the Venuescore analysis. It should also be noted that the Venuescore data are weighted towards clothing and fashion retailing. Within the sub-region, clothing/fashion shopping facilities are primarily focused in the city centre and larger town centres.
- 2.7.12 Each 'venue' has an estimated average market position score based on the retailers present, with the 'market position index' for each centre then calculated by comparing the venue's market position score against the average for all venues. The average market position index is 100 and Cardiff city centre has a market position index of 114 and an 'Upper Middle' market rating. A further example is Cwmbran town centre which has a market position of 89 and a 'Lower Middle' market rating.
- 2.7.13 The market position relates specifically to the fashion offer together with other easily classified operators, because the range and choice of clothing and fashion shopping is the key driver in the relative attraction of large comparison shopping destinations. Javelin also provides other measures of the strength of centres as outlined below.
- 2.7.14 Bridgend, Port Talbot, Maesteg, Porth, Porthcawl, Tonypany, Treorchy and Pyle are all classed as having a 'Lower Middle' market position, which suggests that they do not offer the same level of luxury/high quality retailing as larger centres or centres within areas with higher levels of affluence. However, Cowbridge is classed as having an 'Upper Middle' market position, meaning that the town centre offers higher quality retailing than other centres in Bridgend County Borough.
- 2.7.15 In addition to its market position and Venuescore, each destination is also assessed in terms of a range of other attributes, as follows:
- age focus (is the offer targeting younger or older consumers?); and
 - fashionability of its offer (is the clothing offer traditional or progressive?).
- 2.7.16 The Javelin Group classifies retailers in terms of their 'fashionability', ranging from 'traditional' at one end, then 'updated classic', 'fashion moderate', 'fashion forward' through to 'progressive' at the other, i.e. least fashionable to the most fashionable. This classification is only reliable for larger centres because it focuses on national multiples rather than independent outlets.
- 2.7.17 Each shopping destination is also assigned an age position index, where 100 is the average. A high number reflects bias towards older-focused retailers and a low number reflects bias towards younger-focused retailers.
- 2.7.18 Cowbridge is described as 'Traditional' and has an age position index of 110. Bridgend, Port Talbot and Porthcawl are all described as 'Updated Classic' and have an age position index of 99, 101 and 97 respectively. Maesteg, Tonypany, Treorchy and Pyle are all described as 'Fashion Moderate' and have an age position index of 98, 93, 103 and 103 respectively. Porth is described as 'Progressive' and has an age position index of 99. This demonstrates that there is some association between the fashionability of retailers within a shopping destination and retailers' target demographic.
- 2.7.19 The Javelin information outlined above indicates that there is no standout significant shopping destination in Bridgend borough that has the best prospects for attracting future growth and investment. That being said, Bridgend is ranked higher than the other shopping destinations in the borough.

3 Retail Needs

3.1 Retail Study 2018

3.1.1 The 2018 Retail Study found there to be the following quantitative retail needs in Bridgend County:

Comparison goods

Table 2-1 Quantitative comparison retail needs

	2018	2023	2028	2033
Expenditure capacity (£m)	0.0	2.3	35.9	78.7
Floorspace capacity (sales area, sq.m)	-	350	4,960	9,890

Convenience goods

Table 2-2 Quantitative convenience retail needs

	2018	2023	2028	2033
Expenditure capacity (£m)	0.0	1.5	5.0	7.7
Floorspace capacity (sales area, sq.m)	-	160	520	810

Key findings

3.1.2 The key findings from the 2018 Retail Study were as follows:

- In the short to medium term, there was limited capacity for additional comparison retail floorspace (350 sq.m by 2023).
- In the long term, there was capacity for 9,890 sq.m of additional comparison retail sales area floorspace (up to 2033).
- In the short to medium term, there was very limited capacity for additional convenience retail sales area floorspace (160 sq.m by 2023).
- In the long term, there was capacity for 810 sq.m of additional convenience retail sales area floorspace (up to 2033), still a relatively modest figure over a 15-year period.

3.2 2022 Update

3.2.1 We have updated the following technical inputs which inform the retail capacity forecasts:

Table 2-3 Technical inputs which inform the retail capacity forecasts

Data	Source	How we have used the data
Base Population	Experian	Experian's MMG3 software provides 2020 based population forecasts at postcode sector level. The postcode sector populations are grouped together to form study zones 1-8 used for the purpose of our analysis.
Population Projections	The Council's PG Short Term (2018 based) Growth Strategy	To ensure consistency across the Council's Local Plan evidence base, annual population projections over the study period are projected forward using the Council's growth rates.
Commitments	Bridgend County Borough Council	Included new commitments into the retail capacity tables.

3.2.2 The updated position on quantitative retail needs in Bridgend is as follows:

Comparison goods

Table 2-4 Quantitative comparison retail needs

	2020	2023	2028	2033
Expenditure capacity (£m)	0.0	2.5	45.6	101.8
Floorspace capacity (sales area, sq.m)	-	376	6,291	12,790

Convenience goods

Table 2-5 Quantitative convenience retail needs

	2020	2023	2028	2033
Expenditure capacity (£m)	0.0	-13.2	-4.5	3.8
Floorspace capacity (sales area, sq.m)	-	-1,387	-475	403

Key findings

3.2.3 The key findings are as follows:

- In the medium term, there is some capacity for additional comparison retail floorspace (6,291 sq.m sales area, by 2028).
- In the long term, there is capacity for 12,790 sq.m of additional comparison retail sales area floorspace (up to 2033).

- In the short and medium term, there is no capacity for additional convenience retail floorspace.
- In the long term, there is capacity for just 403 sq.m of additional convenience retail sales area floorspace (up to 2033).
- The main reason for additional capacity in the comparison goods sector is higher population growth (an additional 12,709 persons) when compared with the 2018 position.
- The main reason for less capacity in the convenience goods sector is due to the inclusion of the Aldi foodstore commitment at land at Salt Lake, Porthcawl.

3.2.4 In terms of how the identified need could be met, strategic sites offer the best opportunity to deliver the shortfall in convenience through local service centres. This will minimise the need to travel, reduce dependency on the private car and enable sustainable access to local convenience and community facilities.

3.2.5 It is recommended that the comparison need identified should be met within existing town centres in the first instance in accordance with Planning Policy Wales' 'Town Centre First' policy (see Planning Policy Wales Edition 11, para 4.3.13). This will help reduce car journeys, contribute to the co-location of facilities in existing retail and commercial centres and thereby enhance their vibrancy, attractiveness and viability.

4 Methodology

4.1.1 Stantec's retail methodology is regularly tested at the Examination in Public ('EiP') of local plans or appeals in relation to refused retail planning proposals. In all instances, the Stantec retail methodology has been found to be robust and sound. A small selection of examples is set out below:

- We produced a Retail Needs Study Update on behalf of the London Borough of Hammersmith & Fulham which was published in May 2016. The retail study was tested at EiP as part of the examination of the Hammersmith & Fulham Local Plan. The Local Plan was adopted in February 2018.
- We produced a Retail Study on behalf of Melton Borough Council which was published in July 2015. The retail study was tested at EiP as part of the examination of the Melton Local Plan. The Local Plan was adopted in October 2018.
- We produced a Retail & Leisure Study on behalf of South Hams District Council and West Devon Borough Council which was published in January 2017. The retail study was tested at EiP as part of the examination of the Plymouth and South West Devon Joint Local Plan. Consultation on the Main Modifications version of the Local Plan closed in December 2019. None of the main modifications related to town centres and retail matters.
- We produced a Retail Needs Assessment on behalf of Reigate & Banstead Borough Council which was published in June 2016. The retail study was tested at EiP as part of the examination of the Development Management Plan. The Main Modifications version of the Local Plan was published for consultation in March 2019. None of the main modifications related to town centres and retail matters.

Appendix A Updated Retail Capacity Tables

Table 1: Population 2018 - 2033

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
2017	45,820	28,742	28,991	31,514	42,581	47,297	18,975	16,114	260,034
2018	46,327	29,016	29,289	31,831	42,876	47,629	19,101	16,241	262,310
2019	46,474	29,069	29,387	31,943	42,966	47,728	19,106	16,257	262,930
2020	46,636	29,104	29,496	32,036	43,044	47,849	19,108	16,291	263,564
2021	47,530	28,928	29,168	32,916	44,166	47,761	18,868	16,220	265,557
2022	47,824	29,107	29,348	33,120	44,439	48,056	18,985	16,320	267,199
2023	48,107	29,279	29,522	33,316	44,702	48,341	19,097	16,417	268,781
2024	48,383	29,447	29,692	33,507	44,959	48,618	19,207	16,511	270,325
2025	48,651	29,611	29,856	33,693	45,208	48,888	19,313	16,603	271,822
2026	48,913	29,770	30,017	33,874	45,451	49,151	19,417	16,692	273,284
2027	49,170	29,926	30,175	34,052	45,690	49,409	19,519	16,780	274,722
2028	49,425	30,082	30,331	34,229	45,927	49,666	19,620	16,867	276,146
2029	49,668	30,229	30,480	34,397	46,153	49,909	19,717	16,950	277,502
2030	49,900	30,370	30,622	34,557	46,368	50,142	19,809	17,029	278,797
2031	50,131	30,511	30,764	34,717	46,583	50,375	19,901	17,108	280,090
2032	50,363	30,652	30,907	34,878	46,799	50,608	19,993	17,187	281,386
2033	50,593	30,792	31,048	35,037	47,012	50,839	20,084	17,265	282,672
Growth 2018-2033	4,266	1,776	1,759	3,206	4,136	3,210	983	1,024	20,362

Source: Population derived from Experian Retail Planner MMG3 2020 and grown forward using Council's population projections

Table 2: Convenience expenditure**Convenience per person 2018 - 2033 (£)**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
2017	2,072	2,246	1,968	2,099	2,360	1,954	1,965	2,097
Exc. SFT								
2017	2,002	2,170	1,901	2,028	2,280	1,887	1,898	2,025
2018	2,140	2,320	2,032	2,168	2,438	2,018	2,029	2,165
2023	2,153	2,334	2,044	2,181	2,452	2,030	2,041	2,178
2028	2,153	2,334	2,044	2,181	2,452	2,030	2,041	2,178
2033	2,157	2,339	2,048	2,185	2,457	2,034	2,045	2,183

Total convenience 2018 - 2033 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
2018	99.2	67.3	59.5	69.0	104.5	96.1	38.8	35.2	569.6
2023	103.6	68.3	60.4	72.7	109.6	98.1	39.0	35.8	587.4
2028	106.4	70.2	62.0	74.7	112.6	100.8	40.1	36.7	603.5
2033	109.2	72.0	63.6	76.6	115.5	103.4	41.1	37.7	619.0

Total convenience in BCBC and elsewhere in the study area 2018-2033 (£m)

	Zones		
	BCBC	outside	
	Zones (1-4)	BCBC (5-8)	Total
2018	295.0	274.6	569.6
2023	304.9	282.5	587.4
2028	313.3	290.3	603.5
2033	321.3	297.7	619.0
Growth 2018-2033	26.3	23.1	49.5

Notes:

Per capita expenditure by zone derived from Experian Retail Planner MMG3 2018

Growth rates and SFT deductions derived from Experian Retail Planner Briefing Note 16 (2018)

Total expenditure is a product of per capita expenditure and Table 1

Prices 2017

Table 3: Comparison expenditure**Comparison per person 2018 - 2033 (£)**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
2017	3,356	3,646	2,600	3,350	4,099	2,653	2,425	3,072
Exc. SFT								
2017	2,835	3,080	2,197	2,830	3,464	2,242	2,049	2,596
2018	3,783	4,109	2,930	3,776	4,621	2,991	2,733	3,463
2023	4,147	4,506	3,213	4,140	5,067	3,279	2,997	3,797
2028	4,798	5,213	3,718	4,790	5,862	3,794	3,468	4,393
2033	5,579	6,061	4,322	5,569	6,816	4,411	4,032	5,108

Total comparison 2018 - 2033 (£)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
2018	175.2	119.2	85.8	120.2	198.1	142.4	52.2	56.2	949.5
2023	199.5	131.9	94.9	137.9	226.5	158.5	57.2	62.3	1,068.8
2028	237.2	156.8	112.8	164.0	269.2	188.4	68.0	74.1	1,270.5
2033	282.3	186.6	134.2	195.1	320.4	224.3	81.0	88.2	1,512.1

Total comparison in BCBC and elsewhere in the study area 2018-2033 (£m)

	Zones		Total
	BCBC Zones (1-4)	outside BCBC (5-8)	
2018	500.5	449.0	949.5
2023	564.2	504.6	1,068.8
2028	670.7	599.8	1,270.5
2033	798.2	713.8	1,512.1
Growth 2018 - 2033	297.7	264.8	562.5

Notes:

Per capita expenditure by zone derived from Experian Retail Planner MMG3 2018

Growth rates and SFT deductions derived from Experian Retail Planner Briefing Note 16 (2018)

Total expenditure is a product of per capita expenditure and Table 1

Prices 2017

Table 4: Convenience market shares %

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Zone 1 total	79.7%	41.4%	13.2%	53.5%	17.3%	0.2%	8.6%	19.0%
Aldi, Brackla Street, Bridgend	7.4%	1.8%	1.9%	7.8%	3.3%	0.0%	0.3%	5.2%
Asda, Coychurch Road, Bridgend	18.9%	4.7%	2.0%	19.5%	0.7%	0.0%	0.5%	1.7%
Bridgend out of centre	0.6%	0.0%	0.5%	1.9%	0.0%	0.0%	0.5%	0.5%
Bridgend Town Centre	7.0%	1.3%	1.2%	3.0%	0.0%	0.0%	0.2%	0.6%
Iceland, Bracklea Street Shopping Centre, Bridgend	0.1%	0.3%	0.0%	0.5%	0.0%	0.0%	4.2%	0.0%
Lidl, Bridgend Retail Park, Bridgend	7.6%	6.9%	1.5%	4.6%	5.6%	0.0%	0.4%	1.3%
Other, zone 1	0.9%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Tesco Express, District Centre Broadlands, Bridgend	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Cowbridge Road, Bridgend	18.1%	20.7%	3.3%	9.9%	7.4%	0.2%	0.0%	8.9%
Tesco, Brewery Lane, Bridgend	17.1%	5.5%	2.8%	6.2%	0.3%	0.0%	2.5%	0.8%
Zone 2 total	0.1%	27.4%	0.0%	0.7%	0.1%	0.0%	0.3%	1.5%
Co-op, Lias Road, Porthcawl	0.0%	12.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Other, zone 2	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Porthcawl	0.1%	13.9%	0.0%	0.7%	0.1%	0.0%	0.3%	1.3%
Zone 3 total	0.0%	0.2%	71.2%	1.9%	0.0%	16.5%	0.9%	2.8%
Aldi, Llynfi Road, Maesteg	0.0%	0.0%	20.5%	0.6%	0.0%	4.0%	0.0%	0.2%
Asda, Castle Street, Maesteg	0.0%	0.0%	10.7%	0.0%	0.0%	1.0%	0.9%	0.0%
Maesteg	0.0%	0.0%	13.9%	0.5%	0.0%	1.0%	0.0%	0.4%
Pontycymer	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Castle Street, Maesteg	0.0%	0.2%	26.0%	0.8%	0.0%	10.5%	0.0%	2.2%
Zone 4 total	7.0%	9.1%	6.5%	29.1%	5.3%	0.2%	0.9%	6.2%
Bridgend Designer Outlet (McArthur Glen)	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
Lidl, Broadview, Tondy, Bridgend	0.9%	0.4%	3.7%	14.4%	2.1%	0.0%	0.3%	1.8%
McArthurGlen Designer Outlet, Bridgend	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other, zone 4	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.2%	0.0%
Sainsbury's, The Derwen, Bridgend	6.2%	8.7%	2.9%	12.1%	3.2%	0.2%	0.4%	4.3%
Zone 5 total	10.5%	3.4%	2.0%	12.8%	60.1%	4.3%	10.2%	2.3%
Aldi, Glamorgan Vale Retail Park, Llantrisant	0.0%	0.0%	0.0%	0.0%	6.5%	0.1%	3.3%	1.5%
Cowbridge	7.1%	1.4%	0.0%	0.6%	11.1%	0.0%	0.0%	0.1%
Other, zone 5	0.0%	0.0%	0.0%	0.6%	1.4%	0.0%	0.0%	0.0%
Pencoed	2.4%	0.0%	0.5%	9.1%	1.9%	0.0%	0.0%	0.1%
Pontyclun	1.0%	1.4%	1.2%	0.8%	10.8%	0.1%	0.7%	0.0%
Talbot Green	0.0%	0.3%	0.2%	0.9%	1.7%	0.0%	0.3%	0.0%
Tesco Extra, Green Park, Talbot Green, Pontyclun	0.0%	0.4%	0.0%	0.8%	26.7%	4.2%	5.9%	0.6%
Zone 6 total	0.0%	0.0%	0.0%	0.0%	0.6%	14.5%	45.0%	0.0%
Asda, Colliers Way, Tonypanydy	0.0%	0.0%	0.0%	0.0%	0.6%	14.5%	30.8%	0.0%
Other, zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%
Porth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%
Tonypanydy	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.0%	0.0%
Tonyrefail	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%
Zone 7 total	0.0%	0.0%	0.2%	0.0%	0.0%	44.4%	14.1%	0.5%
Co-op, Station Road, Treorchy	0.0%	0.0%	0.0%	0.0%	0.0%	9.0%	3.1%	0.0%
Lidl, High Street, Treorchy	0.0%	0.0%	0.2%	0.0%	0.0%	20.2%	9.3%	0.5%
Other, zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%
Treorchy	0.0%	0.0%	0.0%	0.0%	0.0%	12.6%	1.7%	0.0%
Zone 8 total	0.3%	13.3%	0.0%	0.6%	0.4%	1.9%	0.0%	43.7%
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.3%	13.0%	0.0%	0.6%	0.1%	0.0%	0.0%	34.9%
Kenfig Hill	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%
Other, zone 8	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%
Port Talbot	0.0%	0.2%	0.0%	0.0%	0.3%	1.9%	0.0%	1.9%
Outside study area total	2.4%	5.2%	6.9%	1.5%	16.1%	18.0%	20.0%	24.0%
Cardiff out of centre	0.5%	1.6%	0.4%	0.6%	4.4%	1.3%	0.6%	0.0%
Other outside study area	0.1%	1.3%	1.6%	0.9%	2.9%	5.8%	6.4%	1.9%
Port Talbot	1.8%	2.3%	4.9%	0.0%	8.8%	8.2%	2.7%	22.1%
Porth	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	10.4%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Notes:

Market shares derived from NEMS household survey (January 2019)

Table 5: Convenience spending patterns 2018 £m

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
Zone 1	79.0	27.9	7.8	36.9	18.1	0.2	3.3	6.7	179.9
Aldi, Brackla Street, Bridgend	7.3	1.2	1.1	5.4	3.5	0.0	0.1	1.8	20.4
Asda, Coychurch Road, Bridgend	18.8	3.1	1.2	13.5	0.7	0.0	0.2	0.6	38.0
Bridgend out of centre	0.6	0.0	0.3	1.3	0.0	0.0	0.2	0.2	2.6
Bridgend Town Centre	7.0	0.9	0.7	2.1	0.0	0.0	0.1	0.2	10.9
Iceland, Bracklea Street Shopping Centre, Bridgend	0.1	0.2	0.0	0.4	0.0	0.0	1.6	0.0	2.3
Lidl, Bridgend Retail Park, Bridgend	7.6	4.7	0.9	3.2	5.9	0.0	0.1	0.5	22.7
Other, zone 1	0.9	0.2	0.0	0.0	0.0	0.0	0.0	0.0	1.1
Tesco Express, District Centre Broadlands, Bridgend	1.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.9
Tesco Extra, Cowbridge Road, Bridgend	17.9	13.9	1.9	6.9	7.8	0.2	0.0	3.1	51.7
Tesco, Brewery Lane, Bridgend	17.0	3.7	1.7	4.3	0.3	0.0	1.0	0.3	28.2
Zone 2	0.1	18.4	0.0	0.5	0.1	0.0	0.1	0.5	19.8
Co-op, Lias Road, Porthcawl	0.0	8.5	0.0	0.0	0.0	0.0	0.0	0.1	8.6
Other, zone 2	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.6
Porthcawl	0.1	9.3	0.0	0.5	0.1	0.0	0.1	0.4	10.6
Zone 3	0.0	0.1	42.4	1.3	0.0	15.8	0.3	1.0	60.9
Aldi, Llynfi Road, Maesteg	0.0	0.0	12.2	0.4	0.0	3.9	0.0	0.1	16.5
Asda, Castle Street, Maesteg	0.0	0.0	6.4	0.0	0.0	0.9	0.3	0.0	7.7
Maesteg	0.0	0.0	8.3	0.4	0.0	0.9	0.0	0.1	9.7
Pontycymer	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1
Tesco, Castle Street, Maesteg	0.0	0.1	15.5	0.5	0.0	10.1	0.0	0.8	27.0
Zone 4	7.0	6.2	3.9	20.1	5.6	0.2	0.3	2.2	45.4
Bridgend Designer Outlet (McArthur Glen)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Lidl, Broadview, Tondy, Bridgend	0.9	0.3	2.2	9.9	2.2	0.0	0.1	0.6	16.2
McArthurGlen Designer Outlet, Bridgend	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other, zone 4	0.0	0.0	0.0	1.8	0.0	0.0	0.1	0.0	1.8
Sainsbury's, The Derwen, Bridgend	6.1	5.9	1.7	8.4	3.4	0.2	0.2	1.5	27.3
Zone 5	10.4	2.3	1.2	8.8	62.9	4.1	3.9	0.8	94.5
Aldi, Glamorgan Vale Retail Park, Llantrisant	0.0	0.0	0.0	0.0	6.8	0.1	1.3	0.5	8.7
Cowbridge	7.0	0.9	0.0	0.4	11.6	0.0	0.0	0.0	20.0
Other, zone 5	0.0	0.0	0.0	0.4	1.4	0.0	0.0	0.0	1.8
Pencoed	2.3	0.0	0.3	6.3	1.9	0.0	0.0	0.0	10.9
Pontyclun	1.0	1.0	0.7	0.5	11.3	0.1	0.3	0.0	14.9
Talbot Green	0.0	0.2	0.1	0.6	1.8	0.0	0.1	0.0	2.8
Tesco Extra, Green Park, Talbot Green, Pontyclun	0.0	0.3	0.0	0.6	27.9	4.0	2.3	0.2	35.2
Zone 6	0.0	0.0	0.0	0.0	0.6	13.9	17.5	0.0	32.0
Asda, Colliers Way, Tonypany	0.0	0.0	0.0	0.0	0.6	13.9	11.9	0.0	26.5
Other, zone 6	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0	0.8
Porth	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	1.0
Tonypany	0.0	0.0	0.0	0.0	0.0	0.0	3.5	0.0	3.5
Tonyrefail	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.2
Zone 7	0.0	0.0	0.1	0.0	0.0	42.7	5.5	0.2	48.5
Co-op, Station Road, Treorchy	0.0	0.0	0.0	0.0	0.0	8.6	1.2	0.0	9.8
Lidl, High Street, Treorchy	0.0	0.0	0.1	0.0	0.0	19.4	3.6	0.2	23.3
Other, zone 7	0.0	0.0	0.0	0.0	0.0	2.6	0.0	0.0	2.6
Treorchy	0.0	0.0	0.0	0.0	0.0	12.1	0.7	0.0	12.8
Zone 8	0.3	9.0	0.0	0.4	0.4	1.8	0.0	15.4	27.2
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.3	8.7	0.0	0.4	0.1	0.0	0.0	12.3	21.7
Kenfig Hill	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2	1.3
Other, zone 8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2	1.3
Port Talbot	0.0	0.1	0.0	0.0	0.3	1.8	0.0	0.7	3.0
Outside study area	2.4	3.5	4.1	1.0	16.8	17.3	7.8	8.5	61.4
Cardiff out of centre	0.5	1.0	0.2	0.4	4.6	1.2	0.2	0.0	8.3
Other outside study area	0.1	0.9	1.0	0.6	3.1	5.6	2.5	0.7	14.4
Port Talbot	1.8	1.5	2.9	0.0	9.2	7.9	1.0	7.8	32.1
Porth	0.0	0.0	0.0	0.0	0.0	2.6	4.0	0.0	6.6
Total	99.2	67.3	59.5	69.0	104.5	96.1	38.8	35.2	569.6

Notes:

Per capita expenditure by zone derived from Experian Retail Planner MMG3 2018

Growth rates and SFT deductions derived from Experian Retail Planner Briefing Note 16 (2018)

Total expenditure is a product of total expenditure (Table 2) and market shares (Table 4)

Prices 2017

Table 6: Comparison market shares %

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Zone 1	56.9%	37.8%	32.7%	48.5%	9.2%	13.1%	5.3%	35.2%
Bridgend out of centre	3.9%	7.4%	0.0%	2.5%	0.1%	0.6%	0.7%	1.4%
Bridgend Retail Park, Cowbridge Road, Bridgend	10.2%	8.7%	1.6%	5.5%	1.8%	5.5%	1.6%	6.6%
Bridgend Town Centre	39.2%	16.3%	29.0%	36.6%	6.0%	6.1%	1.7%	25.3%
Other, zone 1	0.4%	1.7%	0.0%	0.1%	0.0%	0.0%	0.0%	0.1%
Waterton Retail Park, Waterton Road, Bridgend	3.0%	3.7%	2.2%	3.9%	1.2%	0.7%	1.4%	1.9%
Zone 2	0.4%	13.5%	0.0%	0.5%	0.1%	0.0%	0.8%	1.5%
Other, zone 2	0.0%	0.1%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%
Porthcawl	0.4%	13.4%	0.0%	0.2%	0.1%	0.0%	0.8%	1.5%
Zone 3	0.1%	0.0%	17.9%	0.2%	0.1%	0.1%	7.1%	0.5%
Maesteg	0.1%	0.0%	17.9%	0.0%	0.0%	0.0%	7.1%	0.5%
Pontycymer	0.0%	0.0%	0.0%	0.2%	0.1%	0.1%	0.0%	0.0%
Zone 4	14.2%	9.9%	7.6%	18.2%	6.7%	5.6%	4.9%	7.0%
Aberkenfig (Valleys Gateway)	1.1%	0.0%	0.7%	2.3%	0.8%	0.0%	0.1%	0.3%
McArthurGlen Designer Outlet, Bridgend	12.9%	9.9%	6.7%	15.2%	5.9%	5.6%	4.6%	6.4%
Other, zone 4	0.2%	0.0%	0.2%	0.7%	0.0%	0.0%	0.1%	0.2%
Zone 5	6.1%	3.9%	4.1%	8.6%	22.1%	42.0%	9.4%	5.3%
Cowbridge	1.5%	0.7%	0.3%	0.1%	0.2%	5.6%	0.0%	0.0%
Llantrisant	3.8%	1.6%	1.4%	3.0%	6.7%	2.5%	3.2%	0.3%
Other, zone 5	0.2%	0.6%	0.2%	1.5%	0.9%	1.9%	0.2%	0.0%
Pontyclun	0.1%	0.8%	0.0%	0.0%	2.7%	10.6%	1.6%	2.2%
Talbot Green Shopping Park	0.5%	0.4%	2.0%	2.7%	8.9%	11.7%	2.1%	2.3%
Talbot Green Town Centre	0.0%	0.0%	0.1%	1.3%	2.7%	9.7%	2.3%	0.4%
Zone 6	0.0%	0.0%	0.9%	0.0%	17.0%	0.9%	5.7%	0.0%
Asda, Colliers Way, Tonypany	0.0%	0.0%	0.7%	0.0%	4.3%	0.9%	2.1%	0.0%
Other, zone 6	0.0%	0.0%	0.1%	0.0%	2.3%	0.0%	2.0%	0.0%
Tonypany	0.0%	0.0%	0.1%	0.0%	10.4%	0.0%	1.6%	0.0%
Zone 7	0.0%	0.0%	0.1%	0.0%	3.9%	0.0%	15.8%	0.1%
Other, zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.1%
Treorchy	0.0%	0.0%	0.1%	0.0%	3.9%	0.0%	14.8%	0.0%
Zone 8	0.4%	5.5%	2.8%	1.4%	0.5%	0.7%	9.1%	25.8%
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%
Kenfig Hill	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	2.8%
Other, zone 8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Port Talbot	0.0%	1.1%	2.7%	0.0%	0.0%	0.7%	9.1%	14.7%
Pyle	0.4%	3.5%	0.2%	0.6%	0.4%	0.0%	0.0%	4.3%
Outside study area	22.0%	29.3%	33.9%	22.6%	40.5%	37.6%	41.9%	24.6%
Cardiff	17.4%	25.7%	22.8%	19.8%	13.2%	32.0%	10.3%	9.3%
Merthyr Tydfil	0.0%	0.0%	0.2%	0.0%	2.6%	0.0%	10.9%	0.3%
Neath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	2.2%
Other outside area	2.2%	2.4%	0.3%	1.2%	4.2%	3.3%	3.7%	0.7%
Pontypridd	0.0%	0.0%	1.3%	0.2%	18.6%	0.8%	8.3%	0.0%
Swansea	2.4%	1.2%	9.4%	1.4%	1.9%	1.5%	7.3%	12.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Notes:

Market shares derived from NEMS household survey (January 2019)

Table 7: Comparison spending patterns 2018 £m

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
Zone 1	99.7	45.1	28.1	58.3	18.2	18.6	2.8	19.8	290.5
Bridgend out of centre	6.9	8.8	0.0	3.0	0.1	0.9	0.4	0.8	20.9
Bridgend Retail Park, Cowbridge Road, Bridgend	18.0	10.4	1.3	6.6	3.6	7.9	0.8	3.7	52.3
Bridgend Town Centre	68.8	19.5	24.9	43.9	12.0	8.7	0.9	14.2	192.9
Other, zone 1	0.8	2.1	0.0	0.1	0.0	0.0	0.0	0.1	3.0
Waterton Retail Park, Waterton Road, Bridgend	5.3	4.4	1.9	4.6	2.4	1.1	0.7	1.1	21.5
Zone 2	0.7	16.1	0.0	0.6	0.3	0.0	0.4	0.8	18.9
Other, zone 2	0.0	0.2	0.0	0.3	0.0	0.0	0.0	0.0	0.5
Porthcawl	0.7	15.9	0.0	0.3	0.3	0.0	0.4	0.8	18.4
Zone 3	0.2	0.0	15.3	0.3	0.1	0.1	3.7	0.3	20.0
Maesteg	0.2	0.0	15.3	0.0	0.0	0.0	3.7	0.3	19.5
Pontycymer	0.0	0.0	0.0	0.3	0.1	0.1	0.0	0.0	0.5
Zone 4	24.8	11.8	6.5	21.9	13.3	8.0	2.5	3.9	92.9
Aberkenfig (Valleys Gateway)	1.9	0.0	0.6	2.8	1.5	0.0	0.1	0.2	7.1
McArthurGlen Designer Outlet, Bridgend	22.6	11.8	5.8	18.3	11.7	8.0	2.4	3.6	84.2
Other, zone 4	0.3	0.0	0.2	0.9	0.0	0.0	0.1	0.1	1.6
Zone 5	10.7	4.7	3.5	10.4	43.8	59.9	4.9	3.0	140.8
Cowbridge	2.6	0.8	0.3	0.1	0.5	8.0	0.0	0.0	12.3
Llantrisant	6.6	1.9	1.2	3.6	13.2	3.6	1.7	0.2	31.9
Other, zone 5	0.4	0.7	0.2	1.8	1.7	2.7	0.1	0.0	7.5
Pontyclun	0.2	0.9	0.0	0.0	5.4	15.1	0.8	1.3	23.7
Talbot Green Shopping Park	0.9	0.4	1.8	3.3	17.6	16.6	1.1	1.3	43.0
Talbot Green Town Centre	0.0	0.0	0.1	1.6	5.4	13.9	1.2	0.2	22.3
Zone 6	0.0	0.0	0.8	0.0	33.6	1.3	3.0	0.0	38.7
Asda, Colliers Way, Tonypany	0.0	0.0	0.6	0.0	8.4	1.3	1.1	0.0	11.4
Other, zone 6	0.0	0.0	0.1	0.0	4.6	0.0	1.0	0.0	5.7
Tonypany	0.0	0.0	0.0	0.0	20.6	0.0	0.8	0.0	21.5
Zone 7	0.0	0.0	0.1	0.0	7.8	0.0	8.2	0.1	16.2
Other, zone 7	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.1	0.6
Treorchy	0.0	0.0	0.1	0.0	7.8	0.0	7.7	0.0	15.6
Zone 8	0.6	6.6	2.4	1.6	0.9	1.0	4.8	14.5	32.4
Asda, Pyle Industrial Estate, Pyle Cross, Pyle	0.0	1.1	0.0	0.0	0.0	0.0	0.0	2.2	3.3
Kenfig Hill	0.0	0.0	0.0	0.9	0.0	0.0	0.0	1.6	2.5
Other, zone 8	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.1
Port Talbot	0.0	1.3	2.3	0.0	0.1	1.0	4.8	8.2	17.6
Pyle	0.6	4.2	0.1	0.7	0.8	0.0	0.0	2.4	8.9
Outside study area	38.5	34.9	29.1	27.2	80.2	53.5	21.9	13.8	299.2
Cardiff	30.5	30.7	19.5	23.8	26.1	45.6	5.4	5.2	186.9
Merthyr Tydfil	0.0	0.0	0.1	0.0	5.2	0.0	5.7	0.1	11.1
Neath	0.0	0.0	0.0	0.0	0.0	0.0	0.8	1.2	2.0
Other outside area	3.9	2.8	0.3	1.5	8.3	4.8	1.9	0.4	23.8
Pontypridd	0.0	0.0	1.1	0.3	36.8	1.1	4.3	0.0	43.6
Swansea	4.1	1.4	8.0	1.7	3.8	2.1	3.8	6.8	31.8
Total	175.2	119.2	85.8	120.2	198.1	142.4	52.2	56.2	949.5

Notes:

Per capita expenditure by zone derived from Experian Retail Planner MMG3 2018

Growth rates and SFT deductions derived from Experian Retail Planner Briefing Note 16 (2018)

Total expenditure is a product of total expenditure (Table 3) and market shares (Table 6)

Prices 2017

Table 8: Spending patterns summary 2018

Convenience	£m	%
Turnover retained in BCBC zones	251.5	82%
Turnover derived from elsewhere in study area	54.5	18%
Leakage from BCBC zones	43.5	15%

Comparison	£m	%
Turnover retained in BCBC zones	329.4	78%
Turnover derived from elsewhere in study area	92.9	22%
Leakage from BCBC zones	171.1	34%

Notes:

Convenience spending patterns derived from Table 5

Comparison spending patterns derived from Table 7

Table 9: Commitments

Zone	LPA reference	Location	A1 retail	Convenience	Sqm net	Turnover (£m)	Comparison		
			Sqm gross	Sqm gross			Sqm gross	Sqm net	Turnover (£m)
1	P/16/911/FUL	Dunelm, Parc Plaza, Waterton	572	-			572	400.4	2.4
-	P/21/835/FUL	Land at Salt Lake, Porthcall	-	-	1137	13.2	-	284	2.9
-	P/19/656/RES	Land North of Heol, Stradling	-	-	577	5.6	-	577	3.5
2	P/17/816/FUL	Pyle Garden Centrel, Heol Mostyn	135	-			135	94.5	0.6
4	P/17/610/FUL	Lidl, Ffordd Antwn Tondu	667	667	466.55	4.5	-		
Total commitments						23.2			9.3

Notes:

Extant planning permissions are those permissions for additional retail floorspace which have either yet to be completed or yet to open

Gross and net floorspace data has been provided by Bridgend Council

Net floorspace area has been estimated by PBA where exact figures are not available

Sales densities sourced from Mintel 2017 UK Retail Rankings for named food stores

Standard densities of £6,000 per sqm and £9,500 per sqm adopted for other comparison and convenience

All turnovers for 2018

Table 10: Convenience need

Available expenditure		2018	2023	2028	2033
A	Total expenditure (£M)	295	305	313	321
B	Market share of study area (%)	85%	85%	85%	85%
C	Retained expenditure (£M)	252	260	267	274
D	Inflow expenditure (£M)	55	56	58	59
E	Total available expenditure (£M)	306	316	325	333
Claims on expenditure					
F	Turnover of existing floorspace (£M)	306	306	306	306
G	Turnover of commitments (£M)		23.2	23.2	23.2
Quantitative need					
H	Expenditure capacity (£M)	0.0	-13.2	-4.5	3.8
I	Assumed sales density (£ per sqm net)	9,500	9,500	9,500	9,500
J	Net quantitative need (sqm)		-1,387	-475	403
K	Gross quantitative need (sqm)		-1,981	-679	575

Notes:

(1) Row A is the total turnover of BCBC zones (1-4) taken from Table 2. Row B is the market share of BCBC zones (1-4) taken from Table 4 and maintained constant from 2018 onwards. Row C is the product of the market share and total expenditure. Row D is the amount of inflow expenditure derived from other zones in the study area (5-8) taken from Table 5.

(2) Row E is the total turnover of BCBC incorporating both expenditure from the study area and inflow. Row F is the growth in turnover which is forecast at 0.0%.

(3) Row G represents the turnover of commitments to new floorspace in BCBC taken from Table 8. The sales density growth rate described in note (2) is applied from 2018 onwards.

(5) Row H is total expenditure (row E) with a deduction applied for the existing turnover of BCBC and commitments.

(6) Row I is the assumed sales density used to calculate a floorspace requirement. This is the average sales density for all national multiple convenience retailers taken from Mintel 2017 UK Retail Rankings. The sales density growth rate described in note (2) is applied from 2018 onwards.

(7) Row J is calculated by dividing the residual expenditure (row H) by assumed sales density (row I). Row L is calculated by applying a 70% net to gross ratio to the net floorspace requirement (Row J).

2017 prices.

Table 11: Comparison need

Available expenditure		2018	2023	2028	2033
A	Total expenditure (£M)	500	564	671	798
B	Market share of study area (%)	66%	66%	66%	66%
C	Retained expenditure (£M)	329	371	441	525
D	Inflow expenditure (£M)	93	104	124	148
E	Total available expenditure (£M)	422	476	566	673
Claims on expenditure					
F	Turnover of existing floorspace (£M)	422	464	510	560
G	Turnover of commitments (£M)		9.3	10.2	11.2
Quantitative need					
H	Expenditure capacity (£M)	0.0	2.5	45.6	101.8
I	Assumed sales density (£ per sqm net)	6,000	6,592	7,243	7,957
J	Net quantitative need (sqm)		376	6,291	12,790
K	Gross quantitative need (sqm)		537	8,987	18,272

Notes:

- (1) Row A is the total turnover of BCBC zones (1-4) taken from Table 3. Row B is the market share of BCBC zones (1-4) taken from Table 5 and maintained constant from 2018 onwards. Row C is the product of the market share and total expenditure. Row D is the amount of inflow expenditure derived from other zones in the study area (5-8) taken from Table 7.
- (2) Row E is the total turnover of BCBC incorporating both expenditure from the study area and inflow. Row F is the growth in turnover which is forecast at a rate of 1.9%.
- (3) Row G represents the turnover of commitments to new floorspace in BCBC taken from Table 8. The sales density growth rate described in note (2) is applied from 2018 onwards.
- (5) Row H is total expenditure (row E) with a deduction applied for the existing turnover of BCBC and commitments.
- (6) Row I is the assumed sales density used to calculate a floorspace requirement. This is a PBA estimate. The sales density growth rate described in note (2) is applied from 2018 onwards.
- (7) Row J is calculated by dividing the residual expenditure (row H) by assumed sales density (row I). Row L is calculated by applying a 70% net to gross ratio to the net floorspace requirement (Row J).
- 2017 prices.