



Bridgend Replacement Local Development Plan 2018-2033



Settlement Assessment 2019,
Revised 2021

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Bridgend County Borough Settlement Assessment

1. Introduction

- 1.1 A settlement assessment analyses the components of existing settlements, their functional relationships with each other plus their current and potential future roles. A comprehensive range of variables need to be duly considered as part of this process to help establish a sustainable settlement hierarchy that can inform the Replacement Local Development Plan (LDP). This will identify the most appropriate locations to accommodate future development in order to achieve a sustainable pattern of growth, minimise unsustainable patterns of movement and support local services and facilities. This process is fundamental to achieving the Replacement LDP's Vision of transforming Bridgend County Borough into an inclusive network of communities comprising strong, interdependent, connected and cohesive settlements.
- 1.2 A Study to undertake analysis on the role and function of settlements in the County Borough was carried out in 2009, forming part of the evidence base used to underpin the existing LDP. As part of the LDP Review, this Assessment looks to provide an update of that Study and to test its findings and conclusions in light of more recent national policy guidance, contextual information and statistical data. The main objectives of this update are to:
- Employ a clear methodology to assess the current role and function of settlements, their inter-relationships and potential future roles
 - Provide the basis for articulating a clear settlement hierarchy with identified levels of growth attributed to each tier
 - Inform decisions regarding where development should be spatially located to achieve a sustainable pattern of growth
- 1.3 Broadly, this Assessment outlines an updated methodology, its subsequent application and analysis of information to provide conclusions on settlement roles and functions. This will establish a key part of the evidence base for the Replacement LDP and enable future monitoring of data allied to this subject.

2. Policy Context

2.1 *Planning Policy Wales Edition 11, 2021*

- 2.1.1 Edition 11 of Planning Policy Wales (PPW) sets out the land use planning policies and overarching sustainable development goals for Wales, revised to contribute to the statutory well-being goals of the Well-being of Future Generations Act. PPW secures a presumption in favour of sustainable development and considers a plan-led approach to be the most effective means of securing sustainable development through the planning system. PPW has a strong focus on promoting placemaking, which is considered instrumental to achieving sustainable places, delivering socially inclusive development and promoting more cohesive communities. Placemaking is deemed a holistic approach that ‘considers the context, function and relationships between a development site and its wider surroundings’.
- 2.1.2 In order to inform the spatial strategy, PPW requires development plans to include a spatial strategy covering the lifetime of the plan which establishes a pattern of development improving social, economic, environmental and cultural well-being. The link between the number of homes due to be provided and the expected job opportunities is clearly emphasised, as is the location of any new development in relation to existing or planned infrastructure. This is held important to minimise the need to travel, reduce private car reliance and increase opportunities for cycling, walking and the use of public transport. Development plans are deemed to provide the main means for achieving integration between land use and transport planning.
- 2.1.3 PPW specifies a well-defined search process to identify development land. Sustainable previously developed land and/or underutilised sites within existing settlements should be reviewed first before suitable, sustainable greenfield sites within or on the edge of settlements are considered. In either case, a broad balance between housing, community facilities, services and employment opportunities in both urban and rural areas should be promoted to minimise the need for long distance commuting. Significant weight is

attached to developing active and social places in the form of well-connected cohesive communities.

2.2 *Technical Advice Note 4, Retail and Commercial Development, 2016*

2.2.1 TAN 4 promotes a ‘town centre first’ approach that recognises retail and commercial centres as diverse, mixed use focal points that should be primary considerations when assessing the most appropriate places for a wide variety of developments. It is emphasised that the “co-location of these uses and their high levels of accessibility by a range of transport options make them sustainable locations” (TAN 4, para. 2.1, 2016).

2.2.2 TAN 4 highlights the planning system’s role in both creating and sustaining the vibrancy, viability and attractiveness of such centres, seeking to ensure that they have a positive future. Facilitating sustainable access to and within centres is therefore deemed key to achieving these goals through promotion of walking, cycling and public transport. This is considered important to ensure “everyone in society has access to the wide variety of goods and services” (TAN 4, para.2.7, 2016).

2.2.3 TAN 4 thus demonstrates the need to consider retail and commercial centres in terms of their mix of uses and their accessibility when "guiding development to the most appropriate location" (TAN 4, para.4.1, 2016). The need to develop a hierarchy that defines high and low order centres is critical to this aim, by identifying the functional linkages between settlements and understanding how they fit into the larger than local area. Future levels of growth or decline should also be reflected in each centre’s position in the hierarchy.

2.3 *Technical Advice Note 18, Transport, 2007*

2.3.1 TAN 18 describes how to integrate land use planning and transport infrastructure, emphasising how the interactive linkages between the two are critical in achieving sustainable patterns of development. The TAN focuses on achieving the Welsh Government’s environmental outcomes in its Environmental Strategy by highlighting how the development of land is dependent upon transport infrastructure and services for effective

functionality. It is specifically stated, “by influencing the location, scale, density and mix of land uses and new development, land use planning can help to reduce the need to travel and length of journeys, whilst making it easier for people to walk, cycle or use public transport” (TAN 18, para. 2.4).

2.3.2 TAN 18 also stresses the influence that new residential development has on travel patterns and how travel demand can be influenced by the mode of travel, journey length and scope for multi-purpose trips. As such, the TAN states that development plans should aim to identify sites that are accessible to a range of uses (employment, retail and other services) by multi-modal forms of transport, particularly where public transport has current or planned capacity to accommodate further development. It is stated that local authorities should “seek to achieve a broad balance between housing and employment opportunities to minimise the potential need for long distance commuting” (TAN 18, para. 3.3). The theme of sustainable transport, accessibility and the relationship with the settlement hierarchy is therefore given considerable weight in national guidance. It is important to understand the nature of Bridgend County Borough’s settlements to help inform the development plan strategy and allocate development in appropriate, sustainable locations.

2.4 *Technical Advice Note 20, Planning and the Welsh Language, 2017*

2.4.1 TAN 20 provides advice on incorporating the Welsh language in development plans through Sustainability Appraisals, whilst also outlining procedures for windfall development in areas where the language is particularly significant. The TAN stresses the need to assess the potential cumulative effects of development across the plan area; specifically how the strategy and policies are likely to impact on use of the Welsh language and the sustainability of communities. The spatial distribution of new development and infrastructure can be used as a strategic means of supporting the language based on the findings of the Sustainability Appraisal.

2.4.2 PPW also highlights the importance of considering the likely effects of development plans on the use of the Welsh language. In order to achieve this,

'a broad distribution and phasing of development that takes into account the ability of the area or community to accommodate development without adversely impacting use of the Welsh language' is required.

2.5 *Active Travel (Wales) Act, 2013*

- 2.5.1 The Active Travel (Wales) Act aims to promote walking and cycling as an attractive mode of transport for purposeful journeys (i.e. to access work, school or shops and services). It seeks to instil a lasting transformation of how developments are planned to incorporate walking and cycling infrastructure from the outset as well as encouraging long-term behaviour change.
- 2.5.2 The Act makes provisions for the mapping of active travel routes and related facilities in connection with integrated network maps. It also requires year on year improvements in such routes and facilities to enhance opportunities for pedestrians and cyclists to make more meaningful journeys without relying on the car. The principles of Active Travel are well intertwined with PPW, which stresses the need for the planning system to create the right environments and infrastructure for people to walk and cycle.
- 2.5.3 The planning system has a key role to play in facilitating active travel by considering the inter-relationships of settlements, channelling growth towards sustainable areas and delivering new developments that promote active travel journeys through sustainable design. Equally, the needs of pedestrians and cyclists are to be considered in all new road schemes and other highway authority functions. Increasing rates of active travel in Bridgend County Borough will directly support the achievement of every one of all seven well-being goals in the Well-being of Future Generations (Wales) Act 2015.

3. Methodology

3.1 The Development Plans Manual Edition 3 (hereafter referred to as 'the Manual') states that the Local Planning Authority must "formulate a methodology for assessing the role and function of settlements which is clearly set out in the evidence base" (WG, 2020, p.98). This is fundamental to identify which settlements are the most sustainable and have capacity to deliver growth over the life of the Replacement LDP.

3.2 A draft methodology has been devised by the South East Wales Strategic Planning Group (SEWSPG), with the aim of establishing a common approach for sustainable settlement appraisals across the region. The methodology is broadly framed around three key principles, each weighted to represent its corresponding importance in National Policy, as follows:

- Principle 1 focuses on sustainable transport and accessibility on the basis that its provision reduces the need to travel by car and enables access to a wider range of amenities (40% of score).
- Principle 2 considers the availability of facilities and services in an area as this reflects the need for residents of a settlement to travel to access amenities. It also considers whether the current provision of facilities can support the current and future local population (30% of score).
- Principle 3 relates to employment provision, as the presence of a range of employment types in or around a settlement can be used to measure the economic sustainability of an area and reduce commuting distances (30% of score).

These principles are disaggregated into a tiered scoring matrix to better understand the sustainability of an individual settlement. It is therefore sensible to broadly base the methodology for Bridgend County Borough on this approach for regional consistency. However, it is equally important for any methodology to take local considerations into account by ensuring the scoring matrix is relevant to Bridgend County Borough, thereby building upon the previous Study carried out in 2009.

- 3.3 The 2009 Study itself used similar criteria based around employment, housing, travel, retail and community facilities to identify the roles, functions and functional relationships between settlements across the County Borough. There was specific recognition that three recurring factors were most significant to understanding each settlement; the level of sustainable travel opportunities and self-containment, the range of retail and community services and the strength of the employment role. Hence, there are strong synergies between the previous local methodology and the SEWSPG methodology, meaning adoption of the latter would not represent a deviation in approach.
- 3.4 In order to establish a suitable methodology, therefore, this paper will be themed around the three principles identified in the draft SEWSPG methodology. However, some minor tweaks have been made to the scoring matrices to better reflect Bridgend County Borough's characteristics. Firstly, the point scoring thresholds have been adjusted across each of the three principles to ensure they are logical in the context of local datasets. Secondly, the notion of measuring settlement distances to facilities, town centres and electric vehicle charging points has been discounted as a means of assessing Principle 1 as such factors are considered overly site-specific. Instead, more emphasis has been placed on the frequency of public transport services, the presence of active travel routes and the location of each settlement to an M4 junction and/or the A48. These latter criteria are deemed more indicative of a settlement's overall sustainable transportation and accessibility credentials. Thirdly, broader ranges of services and facilities have been considered to appraise Principle 3. The tiered scoring approach has been retained to ensure there is still emphasis on essential community needs, although additional supplementary uses identified by the local Retail Survey have also been duly factored into the matrix for a more comprehensive overview. The specific scoring matrices are detailed sequentially by each Principle, to enable transparent analysis into the role and function of settlements across Bridgend County Borough.

3.5 Principle 1: Sustainable Transport and Accessibility

3.5.1 In order to measure Principle 1 (Sustainable Transport and Accessibility), each settlement's proximity to multi-modal forms of transport will be considered. The presence of an active travel route will be assessed along with the frequency of public transport within the vicinity at peak times (between 6am - 10am and 4pm - 7pm). In order to ensure a comprehensive assessment of public transport, the regularity of inbound and outbound services will be analysed separately as will the presence of a train station within a settlement. This is to identify the scope for residents within each settlement to utilise sustainable means of transport for meaningful journeys, based on 'point in time' information on services, which is admittedly subject to change. A lesser consideration will be the proximity of each settlement to an M4 junction or the A48 (measured linearly). This will show the accessibility of each settlement via the major highway network without placing undue emphasis on private car reliance. The matrix is summarised in Table 1 and the maximum score available per settlement is 34 points.

Table 1: Sustainable Transport and Accessibility Scoring Matrix

Presence of Active Travel Routes	Score
Several Routes within the Settlement	8 points
One Route within the Settlement	4 points
No Routes within the Settlement	0 points
Rail Services	Score
Train station in settlement	8 points
Median inbound frequency of 15 minutes or less at peak times	4 points
Median inbound frequency of between 16 – 30 minutes at peak times	3 points
Median inbound frequency of between 31 – 60 minutes at peak times	2 points
Median inbound frequency of over 60 minutes at peak times	1 points
No inbound services	0 points
Median outbound frequency of 15 minutes or less at peak times	4 points

Median outbound frequency of between 16 – 30 minutes at peak times	3 points
Median outbound frequency of between 31 – 60 minutes at peak times	2 points
Median outbound frequency of over 60 minutes at peak times	1 points
No outbound services	0 points
Bus Services	Score
Median inbound frequency of 15 minutes or less at peak times	4 points
Median inbound frequency of between 16 – 30 minutes at peak times	3 points
Median inbound frequency of between 31 – 60 minutes at peak times	2 points
Median inbound frequency of over 60 minutes at peak times	1 points
No inbound services	0 points
Median outbound frequency of 15 minutes or less at peak times	4 points
Median outbound frequency of between 16 – 30 minutes at peak times	3 points
Median outbound frequency of between 31 – 60 minutes at peak times	2 points
Median outbound frequency of over 60 minutes at peak times	1 points
No outbound services	0 points
Proximity to M4 Junction or A48	Score
Less than 3 miles	2 points
Between 3 miles to 5 miles	1 point
More than 5 miles	0 points

3.6 Principle 2: Facilities and Services

3.6.1 In order to assess Principle 2, each settlement will be analysed in terms of the quantity and variety of services and facilities on offer as detailed in Table 2 overleaf. There is acknowledgement that certain settlements only have one facility, whereas others have a range of facilities; the latter of which will score higher based on the tiered based scoring system. The maximum score available under this Principle is 26 points as detailed in Table 2.

Facility	Description	Score
Tier 1: Regular Needs Banks and Building Societies, Post Offices, Grocery Stores, Convenience Stores, Newsagents, Markets	20+ Facilities	6 Points
	10-19 Facilities	4 Points
	5-9 Facilities	2 Points
	2-4 Facilities	1 Points
	0-1 Facilities	0 Points
Tier 1: Community Facilities Sport, Leisure and Cultural Facilities, Social Clubs, Community Halls, Religious Institutions, Educational and Employment Facilities	20+ Facilities	6 Points
	10-19 Facilities	4 Points
	5-9 Facilities	2 Points
	2-4 Facilities	1 Points
	0-1 Facilities	0 Points
Tier 2: Medical Facilities Hospitals, Doctors Surgeries, Clinics, Dental Surgeries, Opticians, Chemists	15+ Facilities	4 Points
	9-14 Facilities	3 Points
	4-8 Facilities	2 Points
	2-3 Facilities	1 Points
	0-1 Facilities	0 Points
Tier 3: Clothing, Hardware and Household Goods Clothing, Footwear, Catalogue and Departments Stores, DIY and Home Improvement, Flooring and Furnishings, Hardware Stores	10+ Facilities	2 Points
	4-9 Facilities	1 Points
	0-3 Facilities	0 Points
Tier 3: Hobbies, Lifestyle and Accessories Sports, Camping and Leisure Stores, Vehicle Accessories, Music Stores, Jewellers, Florists, Toys, Games and Hobbies, Charity Shops, Filling Stations, Electrical Accessories, Health and Beauty	15+ Facilities	2 Points
	5-14 Facilities	1 Points
	0-4 Facilities	0 Points
Tier 3: Cafes, Bars, Restaurants and Takeaways	20+ Facilities	2 Points
	9-19 Facilities	1 Points
	0-8 Facilities	0 Points
Tier 3: Broadband Connection Average fixed-line broadband speed, based on 2017 data released by Ofcom	High median download speed of > 30 Mb/s	2 Points
	Moderate median download speed of between 24-30 Mb/s	1 Points
	Low median download speed of < 24 Mb/s	0 Points

3.7 Principle 3: Employment Provision

3.7.1 In order to measure Principle 3, consideration will be given to the presence of employment provision within the settlement. It is acknowledged that proximity of employment to settlements does not guarantee local residents will be employed there, although it is still important that these opportunities exist to promote sustainable patterns of movement. Furthermore, it should be noted that employment should not be limited to B use classes (such as light industry) as other sectors such as retail and leisure offer a variety of employment options. Therefore, the scoring matrix in Table 3 is purposely separated by employment type; scored based on the current number of employees working in different broad sectors. This provides an understanding of the possible employment opportunities available in each settlement by both range and quantity. This will be informed by the Business Register and Employment Survey 2017, which estimates the number of jobs held by employees by workplace location. The maximum score available under this Principle is 26 points.

Table 3: Employment Opportunities Scoring Matrix

Employment Type	Description	Score
Retail, Service and Professional – Tier 1 G: Wholesale and retail trade J: Information and communication K: Financial and insurance L: Real estate M: Professional, scientific, technical N/S: Administration and support I: Restaurants, food and beverages	Over 3,000 employees	8 Points
	1,501-3000 employees	6 Points
	501-1,500 employees	4 Points
	201 – 500 employees	2 Points
	21 – 200 employees	1 point
	Under 20 employees	0 Points
	Industrial, Manufacturing and Utilities – Tier 1 A: Agriculture, forestry and fishing B: Mining and quarrying C: Manufacturing D: Utilities, sewerage and waste F: Construction H: Transportation and storage	Over 2,000 employees
901 – 2,000 employees		6 Points
301 – 900 employees		4 Points
151 – 300 employees		2 Points
20 – 150 employees		1 Points
Under 20 employees		0 Points

Hotels and Accommodation – Tier 2 I: Hotels, short stay accommodation and camping	Over 400 employees	5 Points
	201-400 employees	4 Points
	101 – 200 employees	3 Points
	51 – 100 employees	2 Points
	10 – 50 employees	1 Points
	Under 10 employees	0 Points
Assembly, Leisure, Human Health and Social Work - Tier 2 O: Public administration and defence P: Education Q: Human health and social work R: Arts, entertainment and recreation	Over 1,500 employees	5 Points
	501 – 1,500 employees	4 Points
	251 – 500 employees	3 Points
	101 – 250 employees	2 Points
	21 – 100 employees	1 Points
	Under 20 employees	0 Points

3.8 *Statistical Geography*

3.8.1 The initial starting point for analysis is to define the various settlements in the context of functional statistical geographies. The previous Study utilised low level data from the Census 2001 and NOMIS to aggregate Lower Super Output Areas (LSOAs) into functional settlement areas. LSOAs have a minimum size of 1000 residents and 500 households, enabling low level data analysis that overcomes the frequently changing geographies exhibited by electoral wards. The LSOA groupings in the previous study reflected the nature of the County Borough's settlements, thereby permitting analysis of a range of demographic and employment datasets.

3.8.2 Since that time, additional statistical information has become available and considerable residential development has taken place in the County Borough, particularly within Bridgend and the Valleys Gateway. Therefore, rather than constraining the settlement selection with prior definitions, a refreshed iterative analysis has been undertaken to review each LSOA and their groupings in the context of this new information. This was to ensure that the complexity of settlement roles and functions across the County Borough would still be accurately reflected in the hierarchy.

3.8.3 Most of the growth has been relatively self-contained within existing statistical boundaries, and, therefore, the previously identified LSOA groupings still remain logical. However, the level of growth within Bridgend and the Valleys Gateway is notable. These two broad areas contain a number of smaller inter-related settlements, although they are all located in close proximity to each other, share transport links and have collective employment and community functions. This re-evidences the need to create two broader settlement groupings (i.e. Bridgend and the Valleys Gateway) for analysis alongside the other settlements outlined in Table 4 below. The settlements and corresponding LSOA codes are noted for reference.

Table 4: LSOA Settlement Groupings for Analysis

Settlements	LSOA Code
Bettws	W01000975
Blaengarw	W01000978
Bridgend (Brackla)	W01000979, W01000980, W01000981, W01000982, W01000983, W01000984, W01000985
Bridgend (Broadlands)	W01001918, W01001919, W01001920, W01001921
Bridgend (Bryntirion and Cefn Glas)	W01000990, W01000997, W01001010, W01001011, W01001026, W01001027, W01001028
Bridgend (Central)	W01001021, W01001035, W01001036, W01001037
Bridgend (Coity and Parc Derwen)	W01000998
Bridgend (Coychurch)	W01001003
Bridgend (North Bridgend/Litchard)	W01001008, W01001022, W01001023, W01001038
Caerau	W01000991, W01000992, W01000993
Cefn Cribwr	W01000996
Evanstown and Glynogwr	W01000976
Kenfig Hill	W01001048, W01001051
Laleston and Merthyr Mawr	W01000989
Lewiston, Blackmill and Pantyrawel	W01000977
Llangeinor, Lluest and Pontyrhyl	W01001009
Maesteg	W01001014, W01001015, W01001016, W01001017, W01001018, W01001019, W01001020
Nanttyffyllon	W01000994, W01000995
Nantymoel	W01001024, W01001025

North Cornelly, South Cornelly, Maudlam and Kenfig	W01000999, W01001000, W01001001, W01001002
Ogmore Vale	W01001033, W01001034
Pencoed and Heol-y-Cyw	W01001004, W01001005, W01001006, W01001007, W01001039, W01001040
Pen-y-fai	W01001041
Pontryhydycyff, Llangynwyd and Cwmfelin	W01001012, W01001013
Pontcymmer	W01001042, W01001043
Porthcawl	W01001029, W01001030, W01001031, W01001032, W01001044, W01001045, W01001046, W01001047, W01001053, W01001054
Pyle	W01001049, W01001050, W01001052
Valleys Gateway (Aberkenfig and Coytrahen)	W01000974
Valleys Gateway (Bryncethin)	W01000986
Valleys Gateway (Brynmenyn and Ynysawdre)	W01001057
Valleys Gateway (Sarn)	W01000987, W01001055, W01001056
Valleys Gateway (Tondu)	W01001058

3.8.4 This initial process has identified a broad range of settlements to apply the aforementioned tri-principle scoring matrix. Once each settlement has been scored and initial groupings have been made, settlement populations, functional linkages and the existing role of settlements can then be considered to help identify any anomalous results and better inform the final settlement groupings. This will be enabled by more qualitative analysis of population structures, Welsh Language prevalence, community facilities, travel to work patterns and employment self-containment.

3.8.5 The majority of information required by the study is available at LSOA level, hence why these geographical groupings are logical. The main area where this level of information is not available is for travel to work data, although this is available at Middle Super Output Area level, which is a higher level grouping of LSOAs that will still enable effective analysis of the settlements post application of the scoring matrices.

3.8.6 Ultimately, this analysis will inform decisions as to where development should be spatially located to help achieve a sustainable pattern of growth, minimise unsustainable patterns of movement and support local services and facilities.

4. Tri-Principle Settlement Assessment

4.1 Principle 1: Sustainable Transport and Accessibility

- 4.1.1 The first Principle concerns sustainable travel opportunities and the accessibility of different settlements internally, within relation to other parts of the County Borough and across the wider region. Settlements that are well connected via multi-modal forms of transport help increase the propensity for use of sustainable transport options for local residents to access a range of facilities including education, employment and retail. As such, it is vital to understand the number of active travel routes as a means of encouraging walking and cycling, the level of public transport provision to minimise reliance on the private car and the distance to the major highway network as a supplementary transport option. The matrix scoring for this Principle is weighted accordingly to best capture the most sustainable transport options the first instance, akin to the sustainable transport hierarchy. This will indicate which settlements have the opportunity to be more sustainable than others due to their higher level of accessibility.
- 4.1.2 The presence of an active travel route within a settlement helps to identify the scope for meaningful walking and cycling journeys throughout the local community. Settlements that score well in this category have significant potential to promote more active lifestyles, combat social isolation and provide close linkages to the key places (i.e. employment, education or recreation) residents will need to travel to. Some of the larger settlements contain several active travel routes, notably Bridgend, Porthcawl and Maesteg, which is perhaps expected given their status as the largest three towns in the County Borough. However, other pivotal settlements also exhibit several routes, including the western settlements of Pyle, Cornelly and Kenfig Hill, along with the Valleys Gateway, Ogmere Vale and Pontycymmer. The majority of other settlements contain at least one active travel route, demonstrating the connectivity of the County Borough as a whole. Only a small number of settlements do not contain an active travel route *per se*, including Bettws, Cefn Cribwr, Evanstown, Laleston and Pen-y-Fai.

- 4.1.3 Public transport services can complement active travel routes if they are well located, reliable and regular enough to effectively serve the local community. Bus services represent the primary mode of public transport within the County Borough and scrutinising existing services can indicate how far these principles are evident. All settlements have a minimum of one direct bus service to Bridgend that runs at least hourly for 5 days a week, and, therefore, presence of a bus service alone is not definitive indicator of a settlement's functionality. Hence, settlements have been differentiated based on the frequency of bus services to a main town or city at peak times (6am-10am and 4pm-7pm). It must be stressed that bus routes and services are subject to regular change and therefore this indicator is based on a snapshot of current provision. However, in the context of accommodating growth, extensions and tweaks to the existing bus network are often far more feasible than establishing new routes, which habitually prove costly and can be impractical, especially with reduced availability of subsidy.
- 4.1.4 Well serviced settlements are best place to capitalise on this phenomenon and Table 5 identifies those settlements which have access to a higher frequency service. Porthcawl is particularly well-serviced by bus, which is important given the scale of the settlement and the absence of a railway station. In fact, Porthcawl and Laleston and Merthyr Mawr are the only two settlements with median outbound bus service frequencies of 15 minutes or less. However, the majority of settlements have a moderate service, with both inbound and outbound services running every 16-30 minutes on average. It is only the smaller northern settlements that have less frequent services, perhaps owing to their smaller populations and relatively less central geographical locations.
- 4.1.5 Unlike bus services, not all settlements benefit from an existing railway station. The presence of a station within a settlement is therefore reflected in the scoring matrix to identify the potential for additional sustainable travel opportunities at Bridgend, Pencoed, Pyle, Maesteg and the Valleys Gateway. However, the frequency of services at peak times is a further key consideration to identify how far local communities are able to make

meaningful rail journeys for work, leisure or education purposes. Train services and timetables are subject to regular revisions, so this element of the matrix is equally based on 'point in time' information, notwithstanding any future alterations. Bridgend is highest scoring settlement, with both inbound and outbound services running every fifteen minutes or less at peak times (median average). This reflects the town's central position in South Wales, with a number of railway lines running through the station including the inter-city high speed rail service from London (Paddington) to Swansea. Both Pencoed and Pyle also exhibit a relatively high degree of frequency as both stations are also on the South Wales Mainline and early indications are that these service are expected to increase in the medium term. The Maesteg line is however currently less frequent, hence the lower score for both Maesteg and the Valleys Gateway.

- 4.1.6 The final consideration under this Principle is the proximity to an M4 junction or the A48 to reflect the inter-connectedness of each settlement by road. This helps capture the links between main residential areas, employment centres and other areas of regional significance. Even though it is important to consider multi-modal forms of transport when assessing overall settlement accessibility, this particular aspect of the matrix has a lower weighting to ensure there is not undue emphasis on private car reliance. Instead, these links are to be seen as complementary to the more sustainable forms of transport already considered. Settlements within relatively close proximity to the M4 corridor inevitably score more highly under this sub-category. However, admittedly, this part of the matrix doesn't take existing levels of congestion or capacity into account and any new development coming forward would need to address such issues to prove sustainable. For example, although the Valleys Gateway scores maximum points, capacity issues running north to south at junction 36 would heavily constrain further development in this area at present.

Table 5: Availability of Facilities and Services, Scored by Settlement

Settlement	Active Travel Routes	Score	Median Inbound Bus Frequency (Peak Time)	Score	Median Outbound Bus Frequency (Peak Time)	Score	Rail Station in Settlement	Score	Median Inbound Train Frequency (Peak Time)	Score	Median Outbound Train Frequency (Peak Time)	Score	Linear Miles to M4 Junction / A48	Score	Total Score
Bridgend	Several Routes	8	16 – 30 minutes	3	16 – 30 minutes	3	Yes	8	15 minutes or less	4	15 minutes or less	4	Less than 3 miles	2	32
Pyle	Several Routes	8	16 – 30 minutes	3	16 – 30 minutes	3	Yes	8	16 – 30 minutes	3	31 – 60 minutes	2	Less than 3 miles	2	29
Valleys Gateway	Several Routes	8	31 – 60 minutes	2	16 – 30 minutes	3	Yes	8	Over 60 minutes	1	31 – 60 minutes	2	Less than 3 miles	2	26
Maesteg	Several Routes	8	16 – 30 minutes	3	16 – 30 minutes	3	Yes	8	Over 60 minutes	1	31 – 60 minutes	2	More than 5 miles	0	25
Pencoed and Heol-y-Cyw	One Route	4	16 – 30 minutes	3	31 – 60 minutes	2	Yes	8	31 – 60 minutes	2	16 – 30 minutes	3	Less than 3 miles	2	24
Porthcawl	Several Routes	8	16 – 30 minutes	3	15 minutes or less	4	No	0	N/A	0	N/A	0	Less than 3 miles	2	17
N Cornelly, S Cornelly, Maudlam and Kenfig	Several Routes	8	16 – 30 minutes	3	16 – 30 minutes	3	No	0	N/A	0	N/A	0	Less than 3 miles	2	16
Kenfig Hill	Several Routes	8	31 – 60 minutes	2	16 – 30 minutes	3	No	0	N/A	0	N/A	0	Less than 3 miles	2	15
Ogmore Vale	Several Routes	8	31 – 60 minutes	2	31 – 60 minutes	2	No	0	N/A	0	N/A	0	3 to 5 miles	1	13
Pontycymmer	Several Routes	8	16 – 30 minutes	3	31 – 60 minutes	2	No	0	N/A	0	N/A	0	More than 5 miles	0	13
Laleston and Merthyr Mawr	One Route	4	16 – 30 minutes	3	15 minutes or less	4	No	0	N/A	0	N/A	0	Less than 3 miles	2	13
Pontryhydycyff, Llangynwyd, Cwmfelin	One Route	4	16 – 30 minutes	3	16 – 30 minutes	3	No	0	N/A	0	N/A	0	3 to 5 miles	1	11
Caerau	One Route	4	16 – 30 minutes	3	16 – 30 minutes	3	No	0	N/A	0	N/A	0	More than 5 miles	0	10
Lewiston, Blackmill, Pontyrawel	One Route	4	31 – 60 minutes	2	31 – 60 minutes	2	No	0	N/A	0	N/A	0	Less than 3 miles	2	10
Llangeinor, Lluest, Pontyryhyl	One Route	4	16 – 30 minutes	3	31 – 60 minutes	2	No	0	N/A	0	N/A	0	3 to 5 miles	1	10
Blaengarw	One Route	4	31 – 60 minutes	2	16 – 30 minutes	3	No	0	N/A	0	N/A	0	More than 5 miles	0	9
Bettws	No Routes	0	31 – 60 minutes	2	15 minutes or less	4	No	0	N/A	0	N/A	0	Less than 3 miles	2	8
Cefn Cribwr	No Routes	0	16 – 30 minutes	3	16 – 30 minutes	3	No	0	N/A	0	N/A	0	Less than 3 miles	2	8
Nattyffyllon	One Route	4	Over 60 minutes	1	16 – 30 minutes	3	No	0	N/A	0	N/A	0	More than 5 miles	0	8
Nantymoel	One Route	4	31 – 60 minutes	2	31 – 60 minutes	2	No	0	N/A	0	N/A	0	More than 5 miles	0	8
Pen-y-Fai	No Routes	0	31 – 60 minutes	2	31 – 60 minutes	2	No	0	N/A	0	N/A	0	Less than 3 miles	2	6
Evanstown and Glynogwr	No Routes	0	Over 60 minutes	1	31 – 60 minutes	2	No	0	N/A	0	N/A	0	3 to 5 miles	1	4

4.1.7 Overall it is clear that there is a wide disparity between certain settlements across the County Borough in terms of their accessibility. The top five settlements identified in Table 5 (Bridgend, Pyle, Valleys Gateway, Maesteg and Pencoed) are all effectively multi-modal transport hubs that benefit from active travel routes, existing railway stations and relatively frequent bus services. They are also well placed geographically to take advantage of the M4 and A48 linkages. Outside of this initial cluster, Porthcawl scores well despite lacking a train station due to its comparable strength in the other categories. Porthcawl is followed closely by Kenfig Hill and the Cornelly grouped settlement for similar reasons. The remaining settlements score less well, reflecting their lower levels of sustainable accessibility, with Evanstown and Glynogwr receiving the lowest score. It is however acknowledged that residents of this latter settlement do utilise RCT for day-to-day services, including education provision.

4.1.8 This analysis has therefore revealed a very distinct separation between the County Borough's settlements, with the following exhibiting particular merits in sustainable transportation:

- Bridgend
- Pyle
- The Valleys Gateway
- Maesteg
- Pencoed (and Heol-y-Cyw)
- Porthcawl

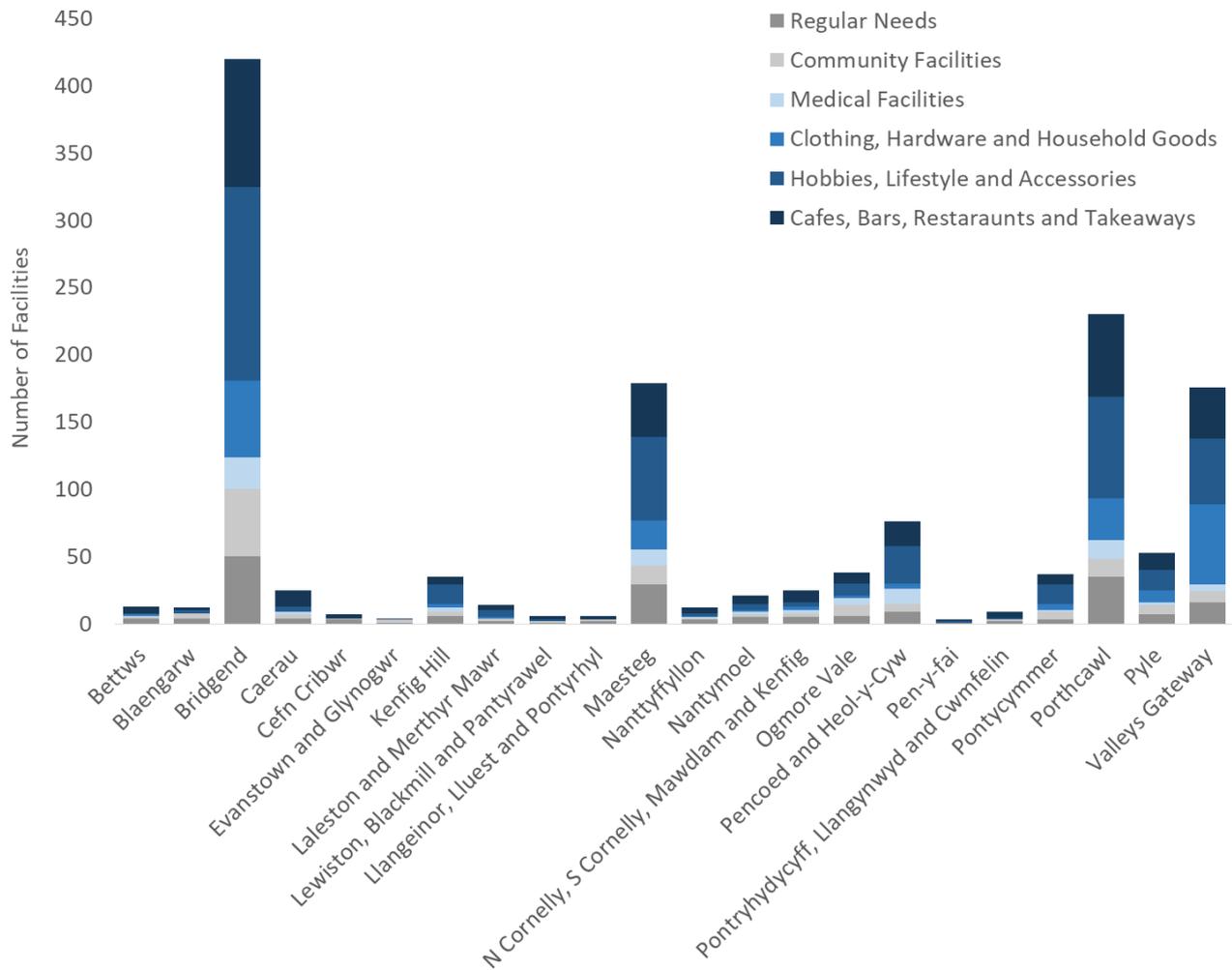
4.1.9 Objectively speaking, these settlements demonstrate high accessibility that could be capable of accommodating growth in an integrated and co-ordinated manner. However, realisation of this phenomenon would depend on a more comprehensive assessment of transport capacity. For example, the existing congestion running north to south at junction 36 of the M4 would inhibit further significant growth within the Valleys Gateway in particular. Nevertheless, these settlements do indicate high sustainable accessibility based on a current snapshot.

4.2 Principle 2: Availability of Facilities and Services

- 4.2.1 The extent and range of retail, community and service facilities within a settlement is a good indication of its socio-economic and amenity based sustainability. All facilities and services are important to differing degrees, although significant clusters have a strong bearing on the position of settlements within a hierarchy. Ultimately, settlements that contain all the facilities that communities require on a regular basis have a stronger community role than settlements where people have to travel elsewhere to meet their needs. Local broadband speeds are also becoming increasingly important to consider in the context of wider settlement connectivity. Each settlement has been duly assessed in these respects to help identify their roles and functions.
- 4.2.2 Prior to application of the tiered scoring matrix, it is imperative to understand how the size of each settlement varies in terms of the number of services and facilities within each broad category (as previously defined in Table 2). Figure 1 overleaf provides a brief visual overview of the recent situation through settlement based categorisation of data from the County Borough Retail Survey 2018.
- 4.2.4 The sheer number of facilities in Bridgend reflects its position as the dominant centre in the County Borough, with a relatively strong comparison goods sector and a wide range of community and medical facilities. Bridgend has almost twice as many services and facilities as Porthcawl (the nearest other settlement in numerical terms), characterised especially by smaller sized multiple retailers and independent retailers. Past retail studies have identified that Bridgend enjoys a much larger catchment area and market share of trade than Porthcawl or Maesteg, resulting in a market potential twice that of the other two towns combined.
- 4.2.5 Despite their very different catchment characteristics, Porthcawl and Maesteg and have comparable levels of services and facilities. Maesteg contains a broadly similar range of retail provision to Porthcawl and its position has been strengthened recently with additional major high street chains and supermarkets. Porthcawl has a larger core catchment population, although

easy access to Pyle, Bridgend and Port Talbot means that residents have a greater choice of alternatives, whereas Maesteg has a relatively high market share of its smaller catchment.

Figure 1: Number of Services and Facilities by Category and Settlement



Data Source: Bridgend County Borough Retail Survey 2018

4.2.6 Figure 1 also identifies the Valleys Gateway as a settlement with a significant number and variety of facilities. This broad area contains a number of smaller inter-related settlements that perform a collective series of community based service functions. Aberkenfig is a particularly notable retail centre within this broader settlement that maintains a relative variety of food outlets and comparison shops outside of the larger towns. These are vital in conjunction with the other local facilities and services on offer to provide range of options for the community that minimise the need for wider travel.

- 4.2.7 Pencoed, Pyle and Kenfig Hill are other notable district centres that include a range of facilities evenly distributed across the eastern and western parts of the County Borough, respectively. These centres provide geographical alternatives to the principal centres of Bridgend, Porthcawl and Maesteg for different facilities. It should be noted that Pyle, Kenfig Hill and North Cornelly have overlapping catchment areas and residents from these areas would have easy access to the services on offer across the broader vicinity.
- 4.2.8 The smaller valley based settlements do evidently contain a range of facilities that serve their local population, with some of the minor centres providing a 'top up' essential retail offer for local people. However, they equally contain a higher proportion of vacant units relative to their current retail offer, reflecting broader viability issues with valley towns as retail centres. The linear nature of the valleys does slightly distort the location of facilities in relation to the population base. In some instances, larger strategic facilities (such as leisure centres) are located in settlements with lower populations than would normally be required to support them i.e. the Garw Valley Leisure Centre. This phenomenon also applies to the local population of Evanstown, who would also access some key service facilities from the west of Rhondda Cynon Taf.
- 4.2.9 Scoring community facilities and service provision is scarcely a definitive science as roles are relative and no two settlements are the same. However, by utilising the aforementioned scoring matrix, Table 6 ranks each settlement based on the number and diversity of facilities and services they contain. A tiered approach is taken to reflect the importance of access to facilities catering for regular needs, community and medical uses, with lower points awarded to services and facilities that are more complementary in nature.
- 4.2.10 Table 6 shows that Bridgend is the highest ranking settlement, with full points in all but one category. This reflects the level and diversity of facilities that serve the most populated part of the County Borough. The only category that Bridgend doesn't achieve full points is for broadband connection speed, although there is only one settlement (Evanstown and Glynogwr) in the whole of the County Borough with a median download speed of more than 30Mb/s. Bridgend is however within the minority of six better performing settlements in

Table 6: Availability of Facilities and Services, Scored by Settlement

Settlement	Regular Needs Category	Points	Community Facilities Category	Points	Medical Facilities Category	Points	Clothing, Hardware and Household Goods Category	Points	Hobbies, Lifestyle and Accessories Category	Points	Cafes, Bars, Restaurants and Takeaways Category	Points	Broadband Connection	Points	Total Points
Bridgend	20+ Facilities	6	20+ Facilities	6	15+ Facilities	4	10+ Facilities	2	15+ Facilities	2	20+ Facilities	2	24-30Mb/s	1	23
Porthcawl	20+ Facilities	6	10-19 Facilities	4	9-14 Facilities	3	10+ Facilities	2	15+ Facilities	2	20+ Facilities	2	<24Mb/s	0	19
Maesteg	20+ Facilities	6	10-19 Facilities	4	9-14 Facilities	3	10+ Facilities	2	15+ Facilities	2	20+ Facilities	2	<24Mb/s	0	19
Valleys Gateway	10-19 Facilities	4	5-9 Facilities	2	4-8 Facilities	2	10+ Facilities	2	15+ Facilities	2	20+ Facilities	2	<24Mb/s	0	14
Pencoed and Heol-y-Cyw	5-9 Facilities	2	5-9 Facilities	2	9-14 Facilities	3	4-9 Facilities	1	15+ Facilities	2	9-19 Facilities	1	24-30Mb/s	1	12
Pyle	5-9 Facilities	2	5-9 Facilities	2	2-3 Facilities	1	4-9 Facilities	1	15+ Facilities	2	9-19 Facilities	1	<24Mb/s	0	9
Ogmore Vale	5-9 Facilities	2	5-9 Facilities	2	4-8 Facilities	2	0-3 Facilities	0	5-14 Facilities	1	0-8 Facilities	0	<24Mb/s	0	7
Pontycymer	2-4 Facilities	1	5-9 Facilities	2	0-1 Facilities	0	4-9 Facilities	1	5-14 Facilities	1	0-8 Facilities	0	24-30Mb/s	1	6
Caerau	2-4 Facilities	1	2-4 Facilities	1	2-3 Facilities	1	0-3 Facilities	0	0-4 Facilities	0	9-19 Facilities	1	24-30Mb/s	1	5
N Cornelly, S Cornelly, Maudlam and Kenfig	5-9 Facilities	2	2-4 Facilities	1	2-3 Facilities	1	0-3 Facilities	0	0-4 Facilities	0	9-19 Facilities	1	<24Mb/s	0	5
Kenfig Hill	5-9 Facilities	2	2-4 Facilities	1	2-3 Facilities	1	0-3 Facilities	0	5-14 Facilities	1	0-8 Facilities	0	<24Mb/s	0	5
Nantymoel	5-9 Facilities	2	2-4 Facilities	1	2-3 Facilities	1	0-3 Facilities	0	5-14 Facilities	1	0-8 Facilities	0	<24Mb/s	0	5
Laleston and Merthyr Mawr	2-4 Facilities	1	2-4 Facilities	1	0-1 Facilities	0	0-3 Facilities	0	5-14 Facilities	1	0-8 Facilities	0	24-30Mb/s	1	4
Evanstown and Glynogwr	0-1 Facilities	0	2-4 Facilities	1	0-1 Facilities	0	0-3 Facilities	0	0-4 Facilities	0	0-8 Facilities	0	>30Mb/s	2	3
Bettws	2-4 Facilities	1	0-1 Facilities	0	0-1 Facilities	0	0-3 Facilities	0	0-4 Facilities	0	0-8 Facilities	0	24-30Mb/s	1	2
Blaengarw	2-4 Facilities	1	2-4 Facilities	1	0-1 Facilities	0	0-3 Facilities	0	0-4 Facilities	0	0-8 Facilities	0	<24Mb/s	0	2
Pontryhydycyff, Llangynwyd and Cwmfelin	2-4 Facilities	1	0-1 Facilities	0	0-1 Facilities	0	0-3 Facilities	0	0-4 Facilities	0	0-8 Facilities	0	<24Mb/s	0	1
Nanttyffyllon	2-4 Facilities	1	0-1 Facilities	0	0-1 Facilities	0	0-3 Facilities	0	0-4 Facilities	0	0-8 Facilities	0	<24Mb/s	0	1
Cefn Cribwr	2-4 Facilities	1	0-1 Facilities	0	0-1 Facilities	0	0-3 Facilities	0	0-4 Facilities	0	0-8 Facilities	0	<24Mb/s	0	1
Llangeinor, Lluest and Pontyrhyl	2-4 Facilities	1	0-1 Facilities	0	0-1 Facilities	0	0-3 Facilities	0	0-4 Facilities	0	0-8 Facilities	0	<24Mb/s	0	1
Lewiston, Blackmill and Pantyrwel	0-1 Facilities	0	0-1 Facilities	0	0-1 Facilities	0	0-3 Facilities	0	0-4 Facilities	0	0-8 Facilities	0	<24Mb/s	0	0
Pen-y-fai	0-1 Facilities	0	0-1 Facilities	0	0-1 Facilities	0	0-3 Facilities	0	0-4 Facilities	0	0-8 Facilities	0	<24Mb/s	0	0

this respect, with a moderate download speed of 24-30Mb/s according to the most recent Ofcom data. The remainder exhibit median download speeds of below 24Mb/s.

4.2.11 Sequentially, Porthcawl and Maesteg achieve identical points, ranked directly beneath Bridgend as the other well serviced, principal towns in the County Borough. The level and range of services and facilities present are clearly evidenced through application of the scoring matrix, highlighting the importance of both settlements to the communities they serve and the County Borough as a whole.

4.2.12 Outside of the three principal towns, the Valleys Gateway, Pencoed and Pyle are the next main cluster of higher scoring settlements. Each settlement scores moderately well across all categories, reflecting their nature as interconnected district centres. Kenfig Hill scores lower than Pyle as a settlement itself, although the population of both areas do share an overlapping catchment area in terms of services and facilities and could be considered in unison for this purpose.

4.2.13 Scoring distinctions become less distinct across the other settlements, although Ogmere Vale in particular does exhibit a relatively wide variety of regular needs, community and complementary facilities to serve its local population. This settlement evidences a high level of provision compared to the other valleys towns outside of Maesteg.

4.1.9 Analysis of information under this Principle has illustrated how settlements vary across the County Borough based on the range of services and facilities they offer. It is important to reiterate that all services and facilities are important to individual settlements to differing degrees. However, settlements with significant clusters of complementary, inter-related uses have the strongest community roles that minimise how far people have to travel to meet their needs. It is therefore very clear that the following settlements meet such criteria and are therefore considered the most sustainable under this Principle:

- Bridgend
- Porthcawl
- Maesteg
- The Valleys Gateway
- Pencoed (and Heol-y-Cyw)
- Pyle (sharing an overlapping catchment with Kenfig Hill and North Cornelly)

4.1.10 These settlements display a strong community service and function role, which could both support and be further enhanced by accommodating future housing and employment growth within their catchments in principle.

4.3 Principle 3: Employment Opportunities

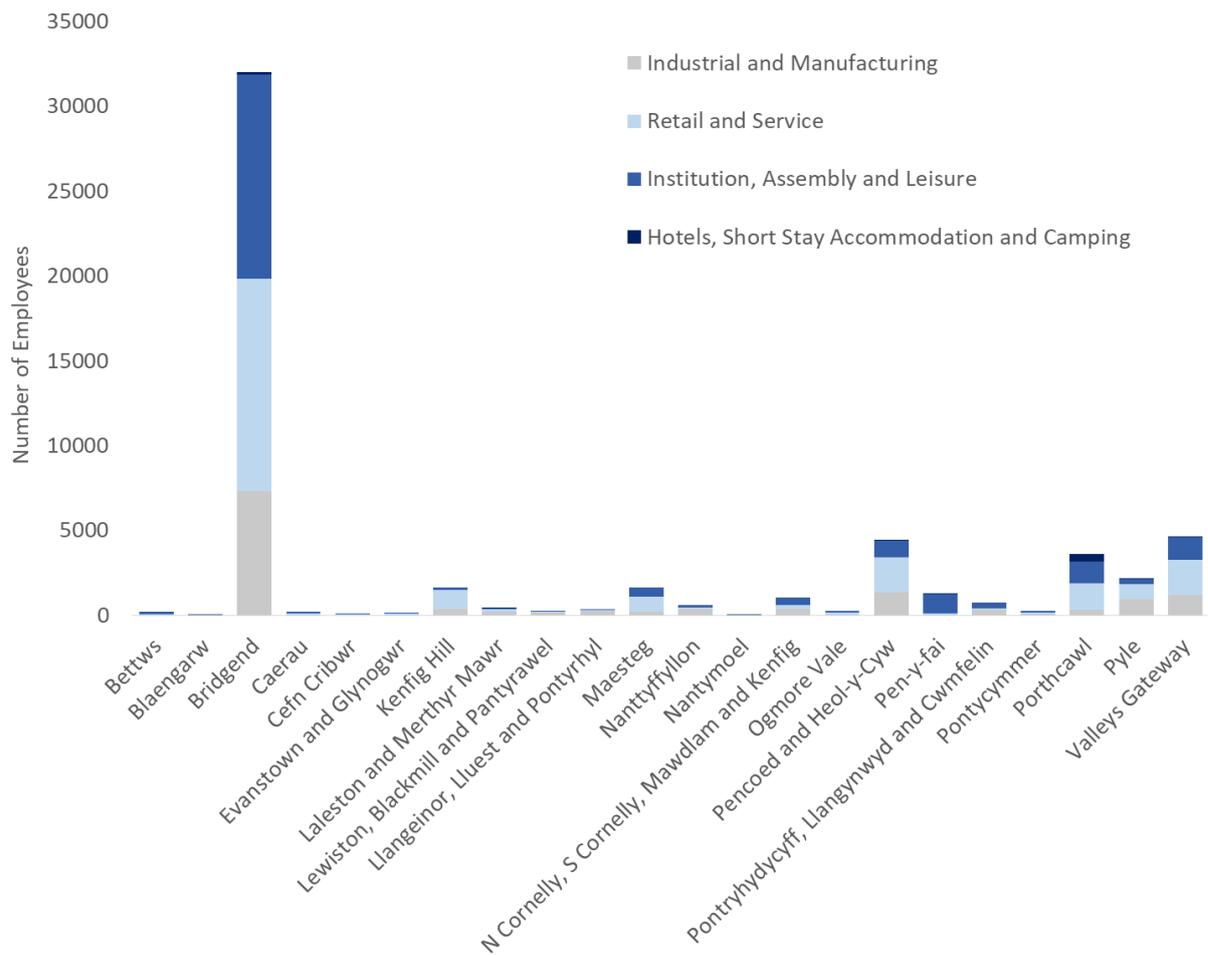
- 4.3.1 Local employment opportunities provide a positive indicator of a settlement's vibrancy and sustainability, particularly if there is a significant range of prospects available. There is no certainty that local employment opportunities will be taken up by local residents, yet it is important to understand the possible employment opportunities available in each settlement to gauge capacity for sustainable growth. This can reduce the need for residents to travel and provide the opportunity to work closer to home.
- 4.3.2 The Business Register and Employment Survey is the official source of employee estimates by detailed geography and broad industry. The survey collects employment information from businesses across the whole of the British economy for each site that they operate. Due to the survey's large sample size (approximately 85,000 businesses), the survey is able to produce good-quality estimates for detailed breakdowns by industry and geography. Furthermore, being a business survey, the quality of this industry data is very good and recommended (by ONS) over industry data from household surveys such as the Annual Population Survey.
- 4.3.3 The Survey records a job at the location of an employee's workplace, with overall estimates then made available at LSOA level. This geography is optimal for this Settlement Assessment and will enable robust analysis of the aforementioned LSOA groupings. The estimates of employees capture anyone aged 16 years or over paid directly from an organisation's payroll(s) in return for carrying out a full-time or part-time job or being on a training scheme. It excludes voluntary workers, self-employed and working owners who are not paid via PAYE. Whereas this data does not indicate the number of vacancies available, it does indicate the level and type of employment in each settlement, and thus, current local employment capacity.
- 4.3.4 Figure 2 presents the number of employees per settlement by the aforementioned four broad industry categories. These categories are designed to indicate the level of diversity in each settlement's employment market. The scoring matrix has been applied to each category to achieve an overall employment opportunity score per settlement as shown in Table 7.

Table 7: Number of Employees by Broad Industry, Scored by Settlement

Settlement	Industrial, Manufacturing and Utilities Employees	Score	Retail, Service and Professional Employees	Score	Assembly, Leisure, Human Health and Social Work Employees	Score	Hotels and Accommodation Employees	Score	Total Score
Bridgend	7320	8	12510	8	12020	5	150	3	24
Porthcawl	320	4	1550	6	1275	4	475	5	19
Valleys Gateway	1220	6	2040	6	1335	4	30	1	17
Pencoed and Heol-y-Cyw	1350	6	2055	6	980	4	20	1	17
Pyle	945	6	890	4	285	3	10	1	14
Maesteg	220	2	895	4	545	4	0	0	10
Kenfig Hill	335	4	1165	4	145	2	0	0	10
North Cornelly, South Cornelly, Maudlam and Kenfig	340	4	265	2	425	3	0	0	9
Pontryhydycyff, Llangynwyd and Cwmfelin	325	4	80	1	340	3	0	0	8
Nanttyffyllon	345	4	95	1	160	2	0	0	7
Pen-y-fai	10	0	110	1	1135	4	30	1	6
Laleston and Merthyr Mawr	195	2	170	1	60	1	20	1	5
Pontycymmer	60	1	80	1	135	2	0	0	4
Caerau	30	1	65	1	110	2	0	0	4
Llangeinor, Lluest and Pontyrhyl	255	2	35	1	50	1	0	0	4
Lewiston, Blackmill and Pantyravel	160	2	25	1	25	1	0	0	4
Bettws	10	0	40	1	165	2	0	0	3
Ogmore Vale	35	1	120	1	80	1	0	0	3
Evanstown and Glynogwr	0	0	115	1	50	1	0	0	2
Nantymoel	0	0	30	1	50	1	0	0	2
Blaengarw	20	1	10	0	40	1	0	0	2
Cefn Cribwr	5	0	55	1	35	1	0	0	2

Data Source: Business Register and Employment Survey, 2017

Figure 2: Number of Employees by Broad Sector and Settlement



Data Source: Business Register and Employment Survey, 2017

4.3.5 Both Figure 2 and Table 7 show that there were over 56,000 employees across Bridgend County Borough in 2017. The main concentration of employment is Bridgend, which accounts for 57% of all employment, and remains the largest single destination for employment in the County Borough. Analysis of total employees shows that there is a significant gap between settlements with over 1,600 jobs and the next level of settlements below. In total, 89% of all employees in the County Borough have jobs in the following seven settlements alone:

- Bridgend
- Pencoed and Heol-y-Cyw
- Pyle
- Kenfig Hill
- The Valleys Gateway
- Porthcawl
- Maesteg

- 4.3.6 It is therefore evident that these seven settlements display a strong employment role relative to other settlements throughout the County Borough. Kenfig Hill and North Cornelly are other notable areas in particular, again sharing an overlapping catchment with Pyle as exhibited in the previous Principle. The tiered scoring matrix builds on this initial analysis to reflect not only the number but also the range of employees across different sectors.
- 4.3.7 As evident in Table 7, application of the scoring matrix reveals Bridgend is by far the highest scoring settlement in terms of both the number of employees *per se* and the diversity of employment sectors. Bridgend contains a rich plethora of employment opportunities across all sectors identified. The only sector where Bridgend ranks second is 'Hotels, Short Stay Accommodation and Camping', which is unsurprising given Porthcawl's higher draw as a seaside tourist destination.
- 4.3.8 Bridgend aside, there is a secondary cluster of settlements which contain notable numbers of employees across all sectors. Porthcawl (19 points), the Valleys Gateway (17 points), Pencoed (17 points) and Pyle (14 points) are close together in the final ranking given the diversity of employment opportunities they contain. They are followed closely by Maesteg and Kenfig Hill, although divisions between remaining settlements are less distinct in terms of breadth and depth of employees.
- 4.3.9 Nevertheless, smaller settlements play a valuable employment function and some have a specific cluster of employees in certain sectors. For example, Pen-y-fai has a considerable number of employees in the 'Assembly, Leisure, Human Health and Social Work' category, which can be mainly attributed to Glanrhyd Hospital. Some of these more minor employment settlement bases may well be candidates for future development within the wider spatial planning context, to meet identified needs or to take advantage of local development opportunities. However, only settlements with a higher level of employment across a number of sectors can be considered as strong, sustainable employment centres.

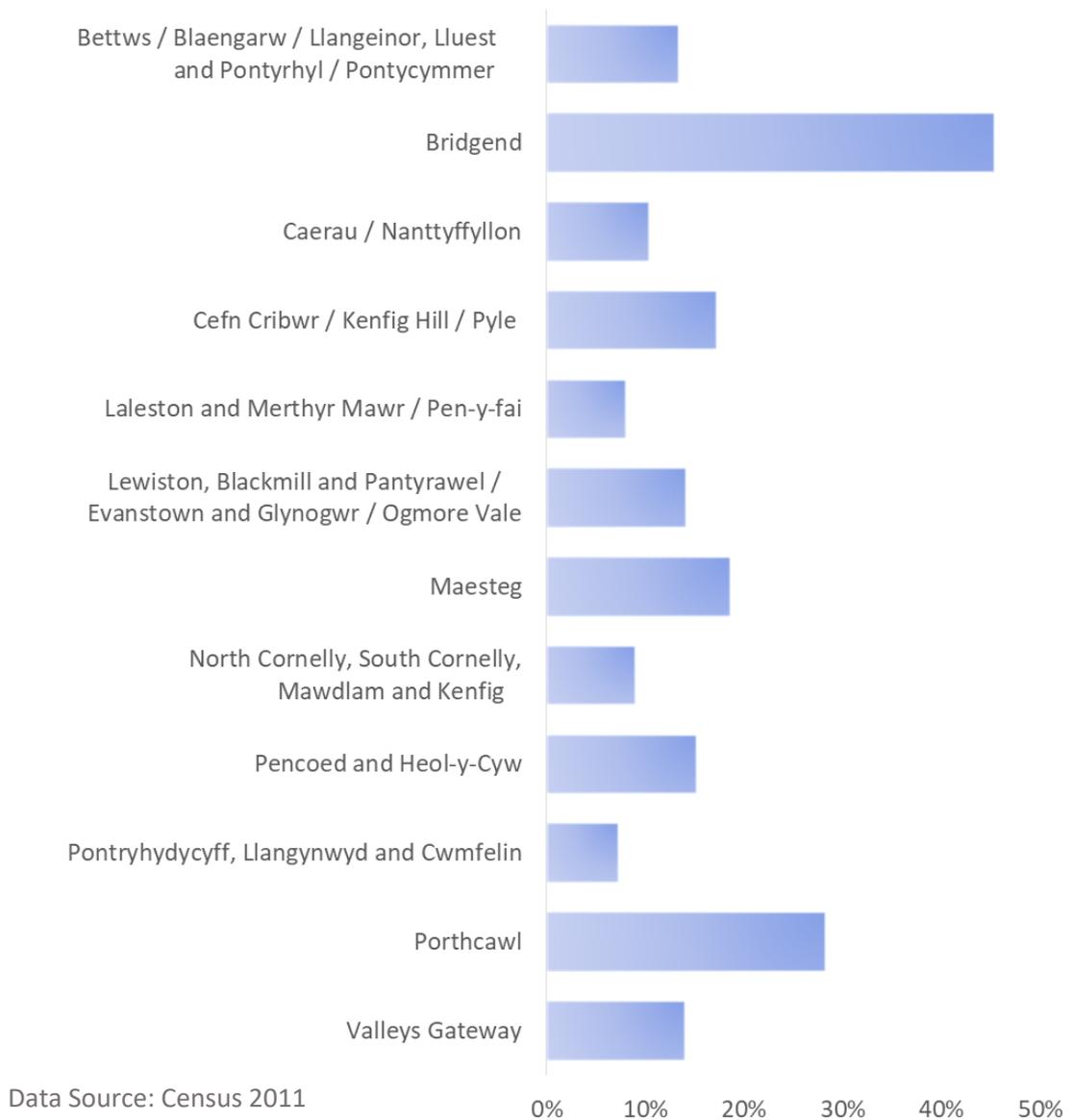
4.3.10 In order to further contextualise this analysis, it is important to consider the functional employment relationships between settlements. This can be shown by scrutinising levels of self-containment to identify how settlements interact with regards to travel to work patterns. This part of the analysis is based on several 2011 Census datasets, meaning it is not strictly comparable with the previous quantitative assessment matrix. This is due to differing time periods of data collection and the fact that travel to work patterns are only available at MSOA level. However, even though the datasets were collected six years apart, this latter analysis will still help to add context to the quantitative assessment. In addition, the MSOA geography has been used as a 'best fit' proxy to indicate patterns within and between different settlement groupings. As such, some of the smaller settlements have had to be grouped together as detailed in the forthcoming figures.

4.3.11 A useful indicator of self-containment is the number of people who live and work within the same settlement, which induces significant potential for sustainable travel. Figure 3 overleaf indicates the percentage of usual residents (aged 16+) in employment within the settlement they resided within the week before the 2011 Census.

4.3.12 The median level of self-containment across all settlements in Bridgend County Borough is 14%, although this varies considerably. It is perhaps no coincidence that settlements with a relatively higher level of self-containment are those with a stronger employment role as identified by the previous dataset. These settlements undoubtedly provide greater opportunities for people to live and work in close proximity. Hence, Bridgend has the highest self-containment level at 45%. Four other areas also have higher than average levels of self-containment:

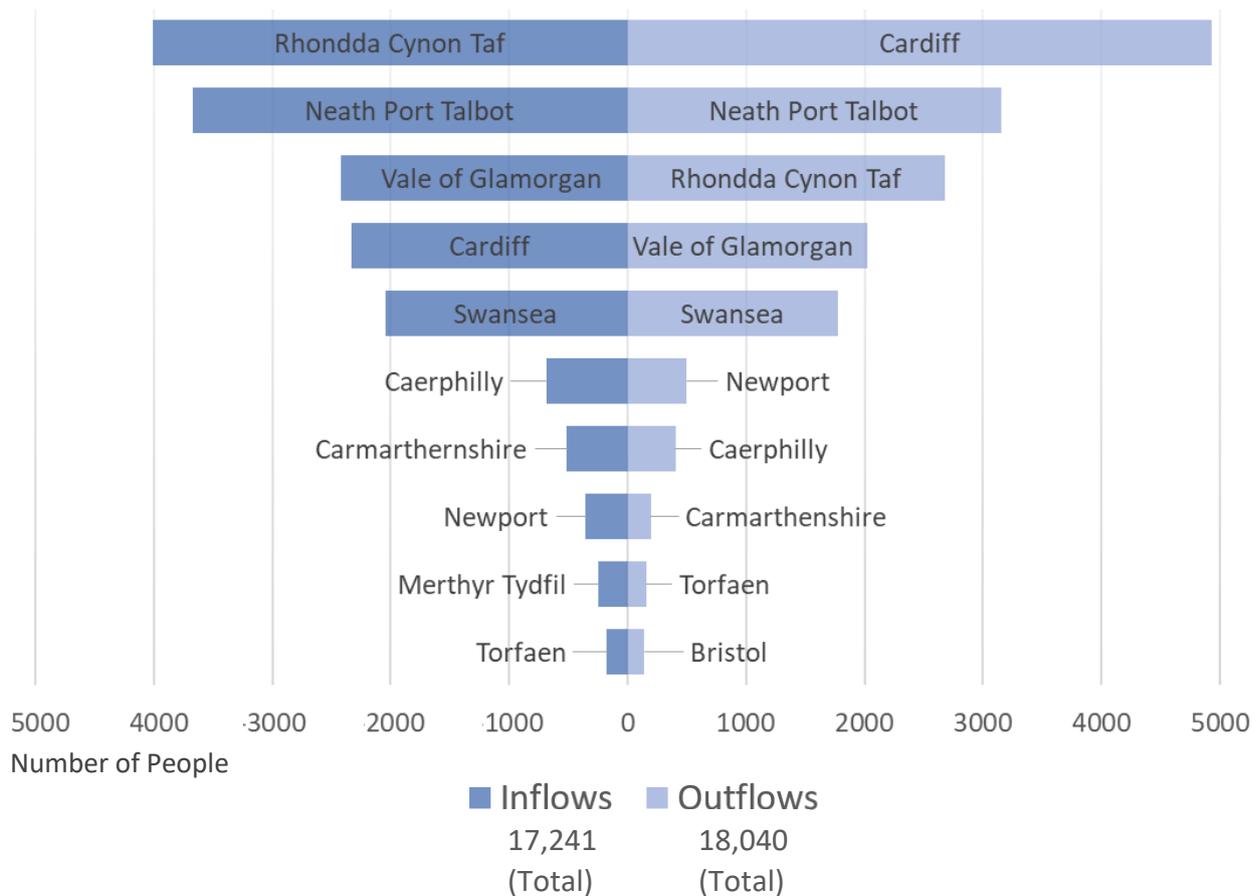
- Porthcawl – 28%
- Maesteg – 19%
- Cefn Cribwr, Kenfig Hill and Pyle – 17%
- Pencoed (and Heol-y-Cyw) – 15%

Figure 3: Employment Self Containment by Settlement



4.3.13 Travel to work patterns can further show the employment relationships between locations by analysing the movement between areas of residence and workplace based destinations. At the very broadest level, Figure 4 shows the main travel to work inflows and outflows from Bridgend County Borough and other local authority areas at the time of the 2011 Census. Overall, 17,241 people commuted into Bridgend from other local authorities in England and Wales, whereas 18,040 people commuted out of Bridgend to other local authorities in the UK or abroad. This is a relatively balanced level of commuting, resulting in a minor net change of -799 in Bridgend County Borough.

Figure 4: Main Workplace Inflows and Outflows, Bridgend County Borough



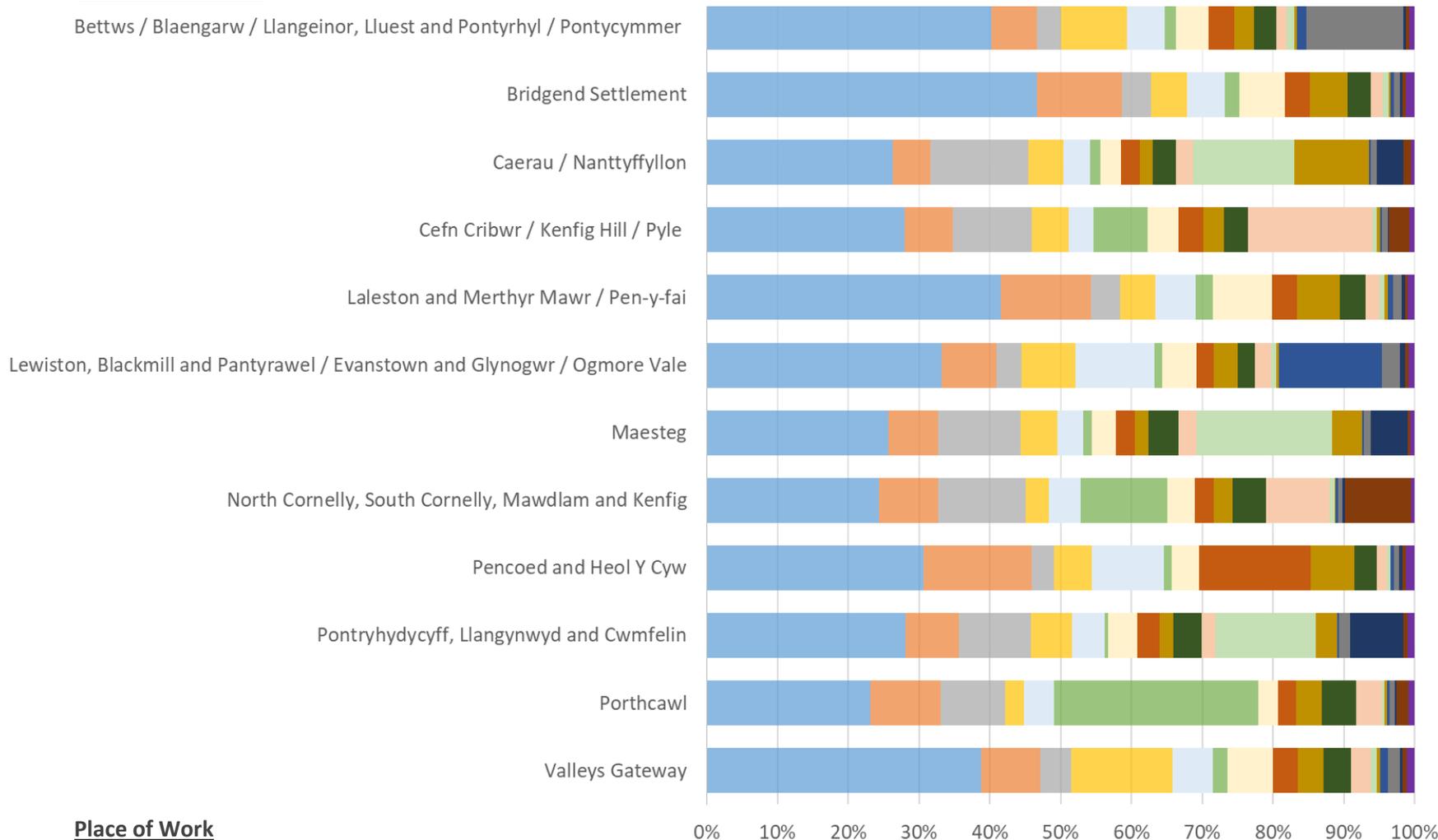
-799: Net Change

Data Source: Census 2011

4.3.13 In addition to this broad context, it is imperative to understand how these trends vary at sub local authority level. Travel to work analysis has therefore been conducted using MSOA geographies to identify the number of people who travel to work from each area and where they go. This exercise has been split into two separate figures to assist with analysis. Figure 5 shows the percentage of people who reside in each Bridgend settlement by place of work, whereas Figure 6 shows the percentage of people working in each settlement by home location.

Figure 5: Main Workplaces of Bridgend County Borough Residents by Settlement

Place of Residence



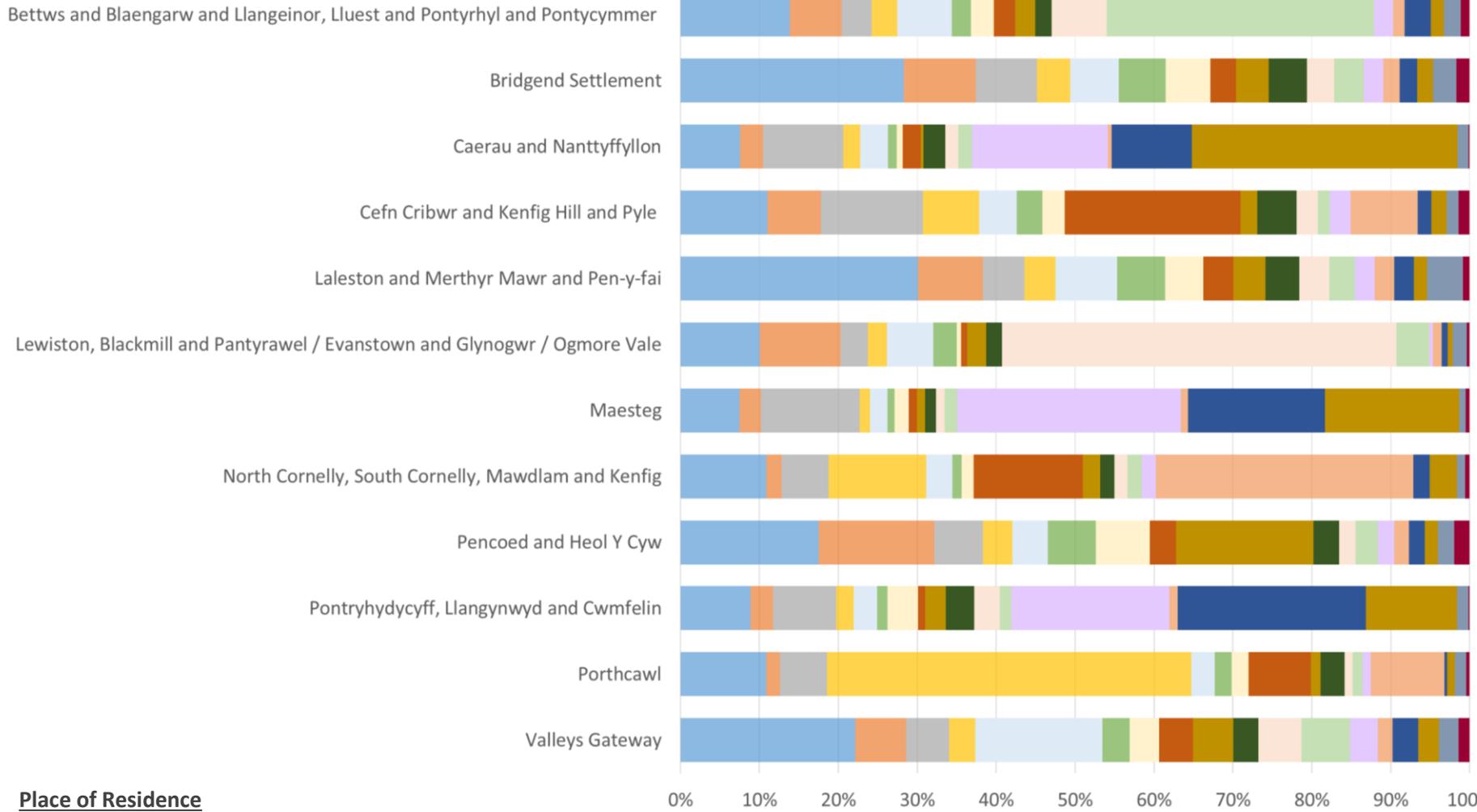
Place of Work

- Bridgend Settlement
- Neath Port Talbot
- Rhondda Cynon Taf
- Laleston and Merthyr Mawr / Pen-y-fai
- The Vale of Glamorgan
- Cefn Cribwr / Kenfig Hill / Pyle
- Caerau / Nanttyffyllon
- Bettws / Blaengarw / Llangeinor, Lluest and Pontyrhyl / Pontycymmer
- North Cornelly, South Cornelly, Mawdlam and Kenfig
- Cardiff
- Valleys Gateway
- Porthcawl
- Pencoed and Heol Y Cyw
- Swansea
- Maesteg
- Lewiston, Blackmill and Pantyravel / Evanstown and Glynogwr / Ogmores Vale
- Pontryhydycyff, Llangynwyd and Cwmfelin
- Newport

Data Source: 2011 Census

Figure 6: Main Home Locations of People Working in Bridgend County Borough Settlements

Place of Work



Place of Residence



Data Source: 2011 Census

- 4.3.14 Close analysis of both Figures 5 and 6 reveal some notable trends. Considering the former initially, Bridgend is the main workplace destination for residents in nearly every single settlement across the County Borough. The only exception is Porthcawl, where Bridgend is the second main workplace destination after Porthcawl itself. However, and broadly speaking, a third of residents in each area of the County Borough actually work in Bridgend, re-emphasising the importance of this settlement as a major employment hub. Cardiff is another consistent workplace destination on a settlement by settlement basis, with around 9% of each area's residents travelling to Cardiff for work purposes; peaking at 15% in Pencoed and Heol-y-Cyw. Other workplace destinations are not as consistently recurrent across all settlements. However, there are notable commonalities within certain clusters. For example, Maesteg is a significant employment destination for residents of the Llynfi Valley (15-20%) and noteworthy proportions of residents commute to Neath Port Talbot from the Llynfi Valley and the West of Bridgend (typically 9-14% per settlement). In addition, residents living in 'North Cornelly, South Cornelly, Maudlam and Kenfig' have a tendency to commute to Pyle and Kenfig Hill (9%) and Porthcawl (12%).
- 4.3.15 On the other hand, Figure 6 effectively shows how far different settlements attract workers residing within and outside of the County Borough. Evidently, the majority of settlements do not attract large proportions of in-commuting outside of the immediate area and some of the smaller settlements principally draw from a more minor employment catchment area. There are however three notable exceptions; Bridgend, Pencoed/Heol-y-Cyw and Cefn Cribwr/Pyle/Kenfig Hill. Over a third of the people working in each of these settlement groupings commute from outside of the County Borough; principally from Rhondda Cynon Taf, Neath Port Talbot, The Vale of Glamorgan and Cardiff. This employment base is further bolstered by shorter commutes from other parts of the County Borough, meaning these settlements act as strong functional centres for employment. Whilst Porthcawl, Maesteg and the Valleys Gateway do not draw similar proportions of workers from outside of the County Borough,

they do attract workers from their more immediate hinterlands, thereby also proving to be significant employment areas.

4.3.16 This combination of data sources has provided a good indication of the balance of sustainable employment opportunities across Bridgend County Borough. Notwithstanding the importance and value of settlements with smaller, local employment bases, a number of settlements with a strong employment function have clearly been identified as follows:

- Bridgend
- Porthcawl
- The Valleys Gateway
- Pencoed (and Heol-y-Cyw)
- Pyle
- Maesteg
- Kenfig Hill / North Cornelly

Opportunities to maximise employment self-containment for existing residents could be harnessed by focusing housing and employment growth towards these sustainable settlements. This could help further develop a series of sustainable settlements that balance jobs, workers and dwellings depending on other material planning considerations.

5.0 Population Structure and Welsh Language Prevalence

5.1 Population Structure

5.1.1 The distribution of population has a significant bearing on the functions and roles of settlements. However, the complicated issue when classifying settlements is that certain population levels do not guarantee relative degrees of functionality. Put succinctly, a number of other spatial issues come into effect (especially accessibility), which are not often easy to directly correlate with population. Demographics have therefore been kept distinct from the tri-principle scoring matrices examined throughout this paper, although such datasets undoubtedly add further context to the analysis.

Table 8: 2017 Based Mid-Year Population Estimates by Settlement and Age Group

Settlements	All People	Ages 0-15	%	Ages 16-64	%	Ages 65+	%
Bettws	2,300	555	24.13%	1,399	60.83%	346	15.04%
Blaengarw	1,766	358	20.27%	1,095	62.00%	313	17.72%
Bridgend	48,998	8,874	18.11%	31,557	64.40%	8,567	17.48%
Caerau	4,142	905	21.85%	2,570	62.05%	667	16.10%
Cefn Cribwr	1,529	268	17.53%	947	61.94%	314	20.54%
Evanstown and Glynogwr	1,131	236	20.87%	695	61.45%	200	17.68%
Kenfig Hill	3,451	719	20.83%	2,138	61.95%	594	17.21%
Laleston and Merthyr Mawr	1,386	200	14.43%	813	58.66%	373	26.91%
Lewiston, Blackmill and Pantyrwel	1,414	280	19.80%	872	61.67%	262	18.53%
Llangeinor, Llest and Pontyrhyl	1,252	250	19.97%	770	61.50%	232	18.53%
Maesteg	10,433	1,764	16.91%	6,415	61.49%	2,254	21.60%
Nanttyffyllon	2,845	575	20.21%	1,706	59.96%	564	19.82%
Nantymoel	2,300	417	18.13%	1,476	64.17%	407	17.70%
North Cornelly, South Cornelly, Maudlam and Kenfig	7,452	1,487	19.95%	4,545	60.99%	1,420	19.06%
Ogmore Vale	3,221	606	18.81%	1,980	61.47%	635	19.71%
Pencoed and Heol-y-Cyw	10,215	1,819	17.81%	6,139	60.10%	2,257	22.09%
Pen-y-fai	2,415	367	15.20%	1,442	59.71%	606	25.09%
Pontryhydycyff, Llangynwyd and Cwmfelin	2,996	499	16.66%	1,849	61.72%	648	21.63%
Pontycymer	2,452	463	18.88%	1,607	65.54%	382	15.58%
Porthcawl	15,897	2,175	13.68%	8,659	54.47%	5,063	31.85%
Pyle	4,197	786	18.73%	2,634	62.76%	777	18.51%
Valleys Gateway	12,496	2,313	18.51%	8,129	65.05%	2,054	16.44%
Grand Total	144,288	25,916	17.96%	89,437	61.99%	28,935	20.05%

Data Source: Mid-Year Population Estimates 2017

5.1.2 Mid-Year Population Estimates have recently been released at LSOA level (2017 based), which enable a categorisation of people by broad age groups. These have been identified across each settlement in Table 8 to illustrate locational variations. The total 2017 based population estimate for the County Borough is 144,288, with Bridgend itself accounting for just over a third of the total population. Outside of Bridgend, there are four other relatively larger settlements, each with an estimated population exceeding 10,000. These are shown in bold in Table 8 along with Bridgend and include:

- Porthcawl (11% of County Borough's population)
- Valleys Gateway (9% of County Borough's population)
- Maesteg (7% of County Borough's population)
- Pencoed and Heol-y-Cyw (7% of County Borough's population)

5.1.3 Several other settlements within the Borough are estimated to contain over 3,000 people, which are shown in italics in Table 8 for reference. Below this are the twelve remaining settlements, which have estimated populations of between 1,131 and 2,996 people. These divisions represent clear gaps between settlements of different population sizes, which predominantly accord with application of the settlement hierarchy matrices. However, demographic analysis alone fails to take into account the other key variables used to understand settlement roles and functions. As such, more moderately populated settlements such as Pyle can be overlooked despite exhibiting relatively high sustainability credentials and levels of self-containment. This is especially notably when Pyle is considered alongside the functionally overlapping settlements of Kenfig Hill and North Cornelly.

5.1.4 Table 8 also shows how the age structure varies between settlements. The overall County Borough age structure is estimated to comprise 18% aged 0-15, 62% aged 16-64 and 20% aged 65 plus. However, specific settlements across the County Borough differ from this average. Bettws for example has a predominately young population; 24% of the settlement's population is

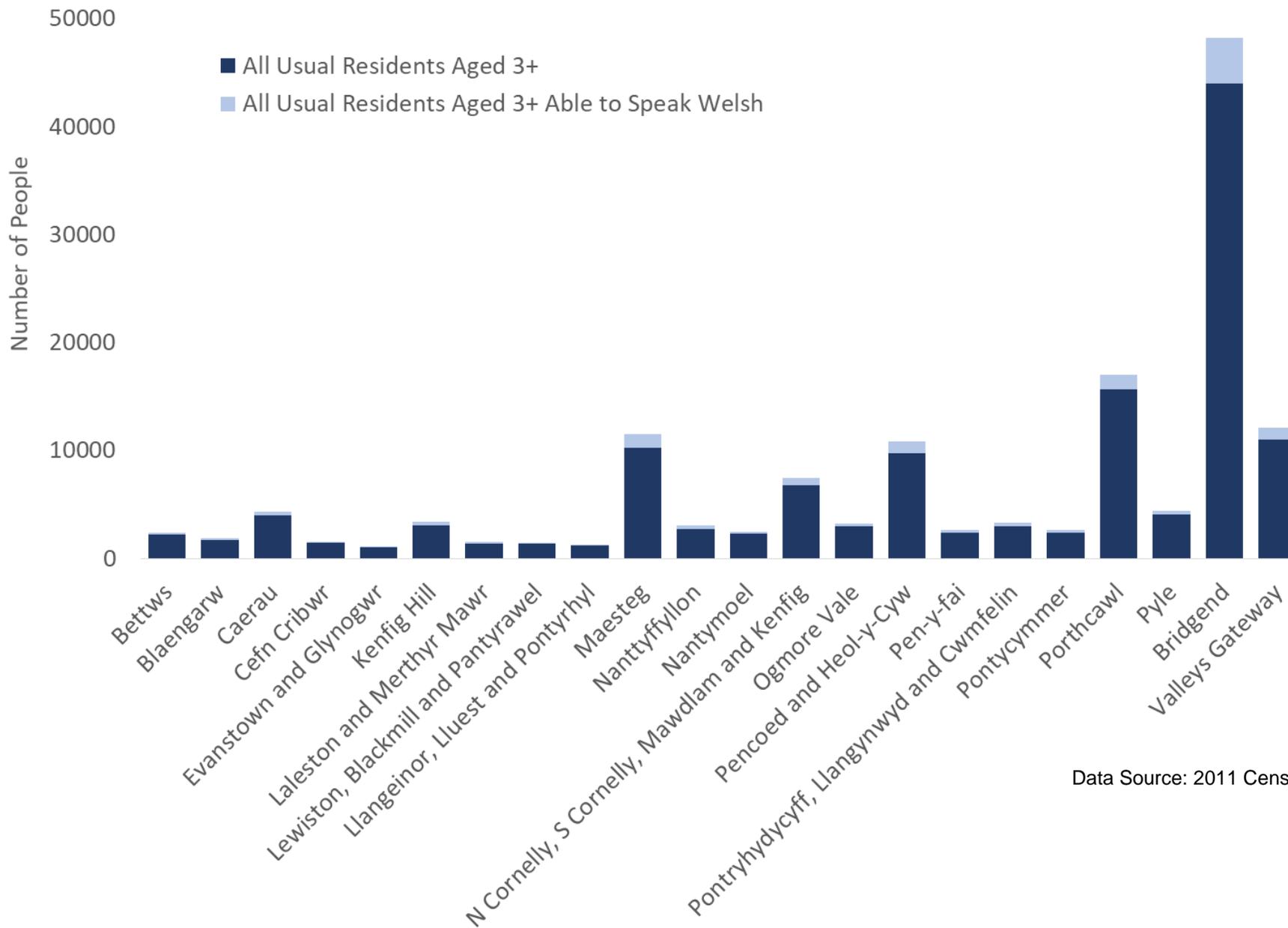
estimated to be 0-15 years old. This high proportion of young people means Bettws also has a lower than average proportion of working age people and the lowest proportion of people aged 65 plus across any settlement in the County Borough (15%).

5.1.5 Conversely, settlements such as Porthcawl and Laleston / Merthyr Mawr have a relatively high proportion of older residents and fewer young people. This could have longer term implications for local employment if there are insufficient economically active residents to support local employers. Some of the larger settlements such as Bridgend and the Valleys Gateway contain a more balanced proportion of age groups that follow the County Borough average more closely. This perhaps reflects the sustainable growth that has occurred in these areas over the life of the current adopted LDP.

5.2 Welsh Language

5.2.1 According to the Census, 9.74% of County Borough are able to speak Welsh on average. A settlement breakdown is provided in Figure 7 overleaf and this varies from 6.77% in Ogmere Vale to 13.65% in Pontryhydycyff, Llangynwyd and Cwmfelin.

Figure 7: Number of Self Defined Welsh Speakers by Settlement (Aged 3+)



Data Source: 2011 Census

5.2.2 More recent data from the Annual Population Survey (previous year ending September 2018) suggests the number of people aged 3 or over able to speak Welsh has increased in both absolute and relative terms as shown in Table 9. However, as no particular settlement contained a notably disproportionate number of Welsh speakers at the time of the Census, it is logical to conclude that this growth in Welsh speakers has occurred across the County Borough on a relatively even basis.

Table 9: Self Defined Welsh Speakers, Bridgend and Wales

	All people aged 3+	Yes, can speak Welsh	No, cannot speak Welsh	Percentage of people who say they can speak Welsh
Bridgend	135,600	22,300	113,000	17%
Wales	2,987,400	885,100	2,099,500	30%

Data Source: Annual Population Survey, previous year ending 30th Sep 2018

6.0 Settlement Assessment Conclusions

- 6.1 This study has analysed a plethora of information to help determine the role and function of settlements across the County Borough through application of a tri-principle scoring matrix. This matrix was broadly derived from the regional SEWSPG methodology, with some point based tweaks, to ensure a locally relevant scoring system would be employed to progress the previous study carried out in 2009. The three primary principles used to analyse each settlement were a) sustainable transport and accessibility, b) facilities and services, and, c) employment provision. Consideration of each of these principles has helped to articulate a clear settlement hierarchy that can be used to inform decisions as to where development should be spatially located to achieve a sustainable pattern of growth.
- 6.2 For completeness, Table 10 overleaf summarises each settlement's score under the three principles to arrive at an overall total score. Fundamentally, this study has confirmed the pre-eminent role of Bridgend as a highly accessible, major employment and retail centre. The settlement has a sub-regional sphere of influence and is dominant in commuting patterns across the County Borough. Over a third of population within the administrative area reside in one of the sub-areas of Bridgend, benefitting from the range of services and facilities on offer. These inter-related factors justify Bridgend as the primary key settlement within the County Borough, evidenced by its overall score of 79, which far exceeds any other settlement in the matrix.
- 6.3 After Bridgend, there is a very distinct cluster of secondary settlements, scoring between 52-57 points in total, with each of the settlements proving significant in their own right. The Valleys Gateway is the highest scoring of these settlements, occupying a central location within the County Borough and forming an almost continuous urban area north of the M4 at the mouth of the Ogmore, Garw and Llynfi Valleys. This area undoubtedly scores highly owing to the inter-connectedness of its sub settlements, high accessibility (including two railway stations and links to the M4), retail facilities and industrial estates. Although the settlement pattern of the Valleys Gateway

shares some similarities with Bridgend, the poly-centric nature of the urban form mitigates against as strong a retail centre role. In many ways, the Valleys Gateway has been a victim of its own success in recent years as it has accommodated substantial new development over the life of the current LDP and there are now capacity issues running north to south at junction 36 of the M4. This issue would currently hamper any significant expansion at present.

Table 10: Overall Tri-Principle Settlement Assessment

Settlement	1. Sustainable Transport and Accessibility Score	2. Facilities and Services Score	3. Employment Provision Score	Total Score
Bridgend	32	23	24	79
Valleys Gateway	26	14	17	57
Porthcawl	17	19	19	55
Maesteg	25	19	10	54
Pencoed and Heol-y-Cyw	24	12	17	53
Pyle	29	9	14	52
Kenfig Hill	15	5	10	30
North Cornelly, South Cornelly, Maudlam and Kenfig	16	5	9	30
Ogmore Vale	13	7	3	23
Pontycymmer	13	6	4	23
Laleston and Merthyr Mawr	13	4	5	22
Pontryhydycyff, Llangynwyd and Cwmfelin	11	1	8	20
Caerau	10	5	4	19
Nanttyffyllon	8	1	7	16
Llangeinor, Lluest and Pontyrhyl	10	1	4	15
Nantymoel	8	5	2	15
Lewiston, Blackmill and Pantyrawel	10	0	4	14
Bettws	8	2	3	13
Blaengarw	9	2	2	13
Pen-y-fai	6	0	6	12
Cefn Cribwr	8	1	2	11
Evanstown and Glynogwr	4	3	2	9

6.3 Along with the Valleys Gateway, the four other settlements in this secondary cluster are Porthcawl, Maesteg, Pyle and Pencoed. All of these settlements function as sub-regional hubs, albeit with a smaller sphere of influence than Bridgend itself as summarised in turn below:

- **Porthcawl** is the third largest settlement in the County Borough after Bridgend and Maesteg, comprising a number of distinct neighbourhoods focusing on the town centre; Newton, Nottage and Rest Bay. The seaside resort lies approximately midway between Cardiff and Swansea, and, as well as being a popular tourist destination, it has become a primary location for retirement and this is reflected in its population profile. There are no rail links to Porthcawl, although it is well serviced by bus and is located within one mile of junction 37 on the M4, connected to it by the A4229.
- **Maesteg** is second largest town in the County Borough, which is the main commercial and shopping centre for the Llynfi Valley. The area is served by the A4063, which links the area to Bridgend to the south, and eastwards via the Sarn Link to Junction 36 of the M4. There is also an established rail link, which connects Maesteg to Bridgend. The Llynfi Valley has several significant employment and manufacturing centres and industrial estates.
- **Pyle** is situated adjacent to Neath Porth Talbot, with access to junction 37 of the M4 motorway and the A48. It shares functionality with **Kenfig Hill and North Cornelly** in terms of employment, services and facilities. There is a railway station at Pyle with services on the Swansea to Cardiff line. There are also a number of different employment sites in this vicinity, which capitalise on the area's excellent location along the strategic highway network.
- **Pencoed** is located in the east of the County Borough, sharing its eastern boundary with the administrative area of Rhondda Cynon Taf.

Pencoed is served by Junction 35 of the M4 motorway and the A473 along with a railway station on the main South Wales Railway Line. Pencoed contains several 'Special' employment areas (most significantly, Pencoed Technology Park), which are of a high quality and reserved for high technology business, manufacturing, research and development. It also benefits from a retail offer via Pencoed District Centre, which has a relatively low vacancy rate but a higher than average provision of service businesses. The adjacent village of Heol-y-Cyw has been considered jointly for statistical analysis in this paper and undoubtedly benefits from Pencoed's broader role and function (i.e. relating to transport, employment, services and facilities). However, for planning purposes, Heol-y-Cyw should be considered an independent Local Settlement as it is a village in its own right and would not be conducive to significant additional economic growth in a manner that would accord with sustainable development principles.

- 6.4 Broadly speaking, these four settlements therefore have a strong employment function with an existing concentration of businesses and a good variety of shopping and community services that meet the needs of each settlement and the surrounding area. The settlements are relatively well self-contained compared to other settlements across the County Borough and demonstrate a range of sustainable travel opportunities that connect with neighbouring areas, Bridgend and the wider region. These inter-related factors justify classification of these settlements as Main Settlements, which, along with Bridgend, can be maintained and progressed through future sustainable development.
- 6.5 Although the aforementioned grouping of settlements should be the main focus for future sustainable development in the County Borough, it is acknowledged that the other settlements scoring below 30 points in the matrix will also provide supplementary opportunities for development. It is anticipated that these settlements would be capable of supporting some additional growth, particularly on underutilised or brownfield land. The scale and type of future planned development in these settlements will reflect their individual

role and function, acknowledging that many currently provide a range of local retail and/or community services to meet the needs of their more immediate vicinities. Appropriate levels of development could help maintain the viability of these existing communities by providing increased revenue for local businesses, whilst also delivering small scale employment opportunities into areas with limited sustainable transport opportunities. In turn, this could also help retain a more balanced, youthful and economically active population profile.

6.6 In summary, therefore, this Study has evidenced the following hierarchy of settlements within the County Borough:

Primary Key Settlement

- Bridgend (*including Brackla, Broadlands, Bryntirion and Cefn Glas, Central Bridgend, Coity / Parc Derwen, Coychurch and North Bridgend / Litchard*).

Main Settlements

- Maesteg
- Pencoed
- Porthcawl
- Pyle, Kenfig Hill and North Cornelly
- Valleys Gateway (*including Aberkenfig, Bryncethin, Brynmenyn, Coytrahen, Sarn, Tondy and Ynysawdre*).

Local Settlements

- Bettws
- Blaengarw
- Caerau
- Cefn Cribwr
- Evanstown and Glynogwr
- Heol-y-Cyw
- Laleston and Merthyr Mawr
- Lewiston, Blackmill and Pantyravel
- Llangeinor, Lluest and Pontyrhyl
- Nanttyffyllon
- Nantymoel
- Ogmore Vale
- Pen-y-fai
- Pontryhydycyff, Llangynwyd and Cwmfelin

- Pontycymmer
- South Cornelly, Maudlam and Kenfig

6.7 This Assessment has evidenced a clear hierarchy that can be used to identify which settlements are most sustainable and have capacity to deliver additional growth. This evidence will contribute to the spatial strategy formulation, based on the role and function of places and utilising principles of sustainable development.