

5 SOCIO-ECONOMICS

5.1 Introduction

Background

- 5.1.1 This chapter sets out the socio-economic and tourism effects of the proposed development. The assessment includes a wide review of the baseline conditions that measure the current socio-economic well-being of the area surrounding the proposed development site. The proposed development is then compared against these baseline trends to understand its likely effects and whether any of these may be significant. Where significant adverse effects are identified, measures are sought to mitigate them as appropriate.
- 5.1.2 The scope of the assessment has been discussed in detail with BCBC Planning Department.

Sports-Led Regeneration

- 5.1.3 There has been considerable research into the regenerative effects of sports related development. For the most part this has focussed on premiership football where the potential investment in the local area can be considerable^{1&2}. However, there is a growing recognition that other sports development can have the same benefits^{3&4}.
- 5.1.4 According to the Welsh Sports Council⁵ in 2004 sport related economic activity added £704m of value to the Welsh economy, equating to 1.8% of the country's Gross Value Added (GVA, at basic prices). Sport also accounted for 1.8% of the total employment in Wales in 2004, equating to 23,200 jobs.
- 5.1.5 The GLA identified that there are significant economic and regenerative benefits of stadiums through trade with the local economy, catalytic effects of match days and the actual redevelopment of the stadium (see also^{6,7,8,9,10}). In addition, evidence shows that clubs and stadiums contribute significantly to the community through social initiatives. The GLA identified *"football's broad appeal to young people, the stimulating environment of football*

¹ Greater London Authority. (June 2003). *Away From Home: Scrutiny of London's Football Stadiums*.

² Johnstone, S., Southern A., & Taylor, R. (2000). *The Midweek Match: Premiership Football and the Urban Economy*. *Local Economy*, 15, 3, 198-213.

³ Cardiff County Council. (July 2000). *Report of the Economic Scrutiny Committee: The Economic Impact of the Millennium Stadium and Rugby World Cup*.

⁴ Northwest Regional Development Agency. (March 2007). *Economic Impact Assessment: Rugby League in England's Northwest*.

⁵ Welsh Sport Council. (May 2008). *Sports Update: The Economic Importance of Sport in Wales*.

⁶ Culture, Media and Sport Committee. May 1999. *Staging International Sporting Events*. <http://www.parliament.the-stationery-office.co.uk/pa/cm199899/cmselect/cmcmds/124/12402.htm>

⁷ London Development Agency. January 2004. *Socio-Economic Assessment: Lower Lea Valley Olympic and Legacy Planning Applications*.

⁸ Manchester Business School. September 2003. *A Case Study of the Local Economic and Social Impact of the Eastlands (Manchester) Asda-Walmart Supercentre*.

⁹ Hepher Dixon. (May 2003). *Socio-Economic Assessment of Stadium MK*.

¹⁰ MCA Regeneration. (May 2001). *Economic Impact Assessment of Arsenal Football Club's Proposals for a New Stadium and Related Development*.

stadiums and the respect given to players provides one means of addressing social, health and educational problems in London” (see also¹¹).

5.2 Policy and Legislation

Introduction

5.2.1 The development plan for Bridgend currently comprises:

- Planning Policy Wales (PPW) adopted in March 2002; and
- The Bridgend County Borough Adopted Unitary Development Plan (UDP) adopted May 2005.

5.2.2 Also of importance is the emerging Local Development Plan (LDP) that will ultimately replace the UDP. The Pre-deposit version of the LDP was consulted on earlier in 2009; final adoption is anticipated by late 2011.

Economy and Employment

5.2.3 PPW states at paragraph 7.2.1 that:

“In designating land for employment needs, local planning authorities should address such issues as the phasing of development and the availability of infrastructure against an agreed identified ‘requirement’. Some local planning authorities have allocations of land for employment and other uses which cannot realistically be taken up in the quantities envisaged over the lifetime of the UDP.

5.2.4 Local planning authorities should therefore review all their non-housing allocations when preparing or reviewing their UDPs and consider whether some of this land might be better used for housing or mixed use developments or no longer be designated for development.”

Policy E6

5.2.5 Policy E6 states that:

“Land is allocated and safeguarded for the establishment of high quality ‘special employment sites’. Such sites must be developed to the highest design and environmental standards and are reserved specifically for high technology business and manufacturing, research and development and related office development, and for no other purpose. In this respect the following sites are allocated at:

E6(1) Bridgend Science Park/Island Farm;

¹¹ Southern and Cleland. (2001). The Effect of Professional Sports Teams on the Image and Morale of the Local Community.

5.2.6 The accompanying text describes the Island Farm site as:

“Land at Island Farm is an undeveloped extension of Bridgend Science Park, which has been successfully developed as a prestige science business park, and is currently occupied by a number of high technology businesses. The existing part of the site benefits from extensive landscaping, and buildings are of a high architectural design. It is anticipated that Land at Island Farm will be developed in a similar manner.”

Policy E7

5.2.7 Policy E7 states:

“Proposals which result in the loss of existing or proposed industrial land or buildings on sites identified in policies E2, E3 and E4 will not be permitted. Exceptions will need to be justified on one of the following grounds:

1. In appropriate locations, a limited number of those uses regarded as complementary and/or ancillary to the main use of the land for industrial purposes; or

2. In appropriate locations, those sui generis employment uses which are regarded as being suitably located on industrial land.”

5.2.8 This policy is notable in that it does not make reference to Policy E6, which would suggest that sites referred in Policy E6 are not as stringently protected as those allocated in Policies E2, E3 and E4.

Sport, Recreation and Open Space

5.2.9 PPW states at paragraph 11.1.3 that:

“Sport and recreation contribute to our quality of life. The Assembly Government supports the development of sport and recreation and the wide range of leisure pursuits which encourage physical activity. They are important for the well being of children and adults and for the social and economic life of Wales. The Assembly Government’s main planning objectives are to promote:

- a more sustainable pattern of development by creating and maintaining networks of facilities and open spaces in places well served by sustainable means of travel, in particular within urban areas;*
- social inclusion, improved health and well-being by ensuring that everyone, including the elderly and those with disabilities, has easy access to good quality, well designed facilities and open space; and*
- the provision of innovative, user-friendly, accessible facilities to make our urban areas, particularly town centres, more attractive places, where people will choose to live, to work and to visit.”*

Tourism

5.2.10 PPW states at paragraph 11.1.2 that:

“The Assembly Government’s objectives for tourism are:

- to encourage sustainable tourism in Wales, maximizing its economic and employment benefits, promoting tourism in all seasons, and encouraging its development in non-traditional destinations, while safeguarding the environment, and the interests of local communities; and*
- to manage change in the tourism sector in ways which respect the integrity of the natural, built and cultural environment to provide for economic growth, employment and environmental conservation.”*

The Community Strategy

5.2.11 The Community Strategy sets out a vision for Bridgend built on principles of equality of opportunity, social justice and the health and well being of local citizens which will inform a wide range of Council strategies, including the LDP. The Community Strategy for Bridgend was approved by the Council on the 25th November 2004 and was published in December 2004. The existing strategy sets out a series of aims which reflect the priorities local people and organisations have identified, which are to:

- Improve quality of life for all;
- Protect and enhance our environment;
- Increase prosperity;
- Have safer communities;
- Achieve a healthier County Borough;
- Have a more inclusive County Borough.

5.2.12 A new Community Strategy is being development around six themes:

- **“Strong Communities:** The strength of our communities underpins Bridgend County. We will protect, preserve and promote the areas in which we live, work and play and enhance every resident’s sense of safety, citizenship and belonging.
- **Young Voices:** Our youngest citizens are the future leaders, teachers, entrepreneurs and shapers of Bridgend County. We will provide opportunities for their education, training and personal growth, and ensure their voices are heard as they move towards their bright future.
- **Proud History:** We value our heritage and history of working together. We will celebrate our past and learn from our experiences to steer us towards a bright future.
- **Green Places:** The quality of our environment is assets that brings benefits to all who live, work and visit our communities. We will value, promote, sustain and protect our natural, built and historic environment for the future.
- **Healthy Living:** The physical and mental wellbeing of our residents is vital for them to enjoy a happy and healthy future. We will support individuals, employers

and key services to achieve healthier, active and positive lifestyles and a greater quality of life for all.

- New Opportunities: Our bright future depends on skilled and reliable employees which businesses can feel confident in. We will build on our place in the knowledge economy by developing our workforce, enhancing our skills base and supporting local companies.”

5.3 Assessment Methodology and Criteria

Scope of the Assessment

Spatial Scope

- 5.3.1 For the purposes of this assessment, the study area has been defined using Lower Super Output Areas (LSOAs) as set out on the Office of National Statistics (ONS) website¹² (see Fig 13 Socio-economic Assessment Study Areas). In addition the effect of the project will be considered at local authority, county and regional levels as appropriate.
- 5.3.2 Where appropriate, other spatial areas may be referred to if they are necessary to reflect a particular strategy (for example, an area action plan) or catchment (for example, secondary school catchments can cover considerable areas).

Temporal Scope

- 5.3.3 Whilst some effects will be caused during the construction of the project whilst others may not become fully apparent until a considerable time after the project is completed. Consequently, effects of each phase of the project are considered over the following periods:
- Construction.
 - Completion of the development to its full occupation, usually assumed to be within a year.
 - Where necessary, the longer term, i.e. the five years following full occupation.
- 5.3.4 All impacts are described as being either temporary or permanent. Where impacts are considered to be temporary, this will be qualified (i.e. for the duration of the construction period only).

Assessment Methodology

Additionality

- 5.3.5 Additionality is a process of assessing the effect of regeneration projects that has been developed by English Partnerships (EP, now part of the Home and Communities Agency

¹² www.statistics.gov.uk

(HCA)) and advocated by both HM Treasury¹³ and the Office of the Deputy Prime Minister (ODPM)¹⁴ (now part of the Department for Communities and Local Government (DCLG)). EP's additionality guide¹⁵ sets out a methodology for assessing a variety of potential impacts through a common framework.

- 5.3.6 In simple terms, the methodology compares the impact of the project to the impact of the base case (i.e. the impact of the uses already occurring on the project site). The difference is the net additional effect of the project, or the effect that can be attributed to the project that would not have occurred in the base case.
- 5.3.7 A number of parameters are used to describe the effect of the project and the base case (also known as deadweight) so they can be compared on a like for like basis. In the EP guide, those relevant to the project are defined as:
- Leakage: *“the proportion of outputs that benefit those outside of the projects target area”*. For example, the number of jobs that are filled by people outside the area surrounding the project.
 - Displacement: *“the proportion of the projects outputs/outcomes accounted for by reduced outputs/outcomes elsewhere in the target area”*. For example, the amount of a new business' income is likely to be generated from competition with similar businesses in the local area.
 - Economic Multiplier Effects: *“further economic activity (jobs, expenditure, income) associated with additional local income and local supplier purchases”*.
- 5.3.8 The additionality methodology is not used in isolation. Relevant research and experience of other projects is used to validate inputs into the assessment and its results.
- 5.3.9 Many social effects cannot be submitted to quantitative analysis, as many of the benefits and disbenefits that arise from development are subjective, relating to the quality of life of existing future residents, visitors and employees. Therefore, although systematic examinations can be undertaken in the context of the additionality framework, the conclusions must necessarily be descriptive in nature, indicating whether a defined impact is expected to be positive or negative, significant or insignificant. Following on from this, particular aspects of the impact that might indicate appropriate mitigation needs to be undertaken will then be highlighted.

Economy and Employment

- 5.3.10 Economic effects are considered primarily in terms of effects on employment since this is a good indicator for the well being of the local economy as well as significantly contributing to social well being. In addition, economic effects can be considered in terms of local business competition and linkages.
- 5.3.11 The units included in the proposed development will generate both competition with similar

¹³ HM Treasury. (January 2003). Appraisal and Evaluation in Central Government.

¹⁴ ODPM. (September 2003). Assessing the Impacts of Spatial Interventions: Regeneration, Renewal and Regional Development.

¹⁵ EP. (October 2008). Additionality Guide 3rd Edition.

businesses and linkages to suppliers. These changes in expenditure patterns can result in changes in the income of some businesses and their employment requirements.

- 5.3.12 The number of workplaces provided in a development can be calculated by using standard employment density multipliers produced for EP¹⁶.
- 5.3.13 The additionality of these jobs is calculated with the result indicating the number of new jobs likely to be provided in the local area. The significance of these is then considered qualitatively in the context of the employment needs of the local population.

Assessment Criteria

- 5.3.14 The level of significance of an impact will be determined through professional judgement of factors including sensitivity of the receptor group, the magnitude (amount of change) of the impact and its duration. The criteria used to describe the significance of an input are set out in Table 5.1.

Table 5.1: Impact Significance Criteria

Significance	Criteria
Severe (-ve only)	The effect of the project on a particular receptor group is such that it is highly likely the mitigation measures would be sufficient. The project should be reconsidered and should only be allowed to continue where there are clear substantial overriding benefits to the wider community.
Major	This positive or negative effect of the project is likely to be a material consideration in determining the planning application. Where the effect is negative there is likely to be concern that there will be a residual effect following implementation of any available mitigation measures. Where the effect is positive it is likely that the scheme will have far reaching benefits/enhancements to the community.
Moderate	This positive or negative effect of the project is likely to be notable to only a select group, possibly a sub-set of a sensitive receptor group and most likely at a local level (i.e. the study area or less). Where the effect is negative it should be possible for it to be fully mitigated with a high degree of certainty and with little potential of measurable residual effects. Particular attention should be given to the potential for cumulative effects. For example, a number of sources of disturbance (such as noise and light) on a single receptor have the potential to result in an accumulative residual effect of greater significance. Where the effect is positive it is likely that it will be local in nature.
Minor	This positive or negative effect of the project is unlikely to be a material consideration in determining the planning application.

¹⁶ English Partnerships. (September 2001). Employment Densities: A Full Guide.

Significance	Criteria
	<p>Where mitigation measures are required for adverse effects they should be such that there is no uncertainty as to their effectiveness with no likelihood of any noticeable residual effects.</p> <p>Where the effect is positive, consideration should be given to the degree of enhancement potential available, particularly where the effect is an objective of the overall project.</p>
Neutral	The project has no perceptible positive or negative effect on a particular sensitive receptor group.

5.3.15 In addition, effects may be described in the following ways as appropriate:

- Reversible or irreversible;
- Occurrence of the effect: i.e. in the short, medium or long term;
- Duration of the effect: i.e. temporary or permanent;
- Fluctuation of the effect: i.e. level of change/variation over time;
- Nature of the effect: i.e. direct, indirect and cumulative.

5.4 Mitigation and Enhancement Measures

5.4.1 By definition mitigation measures are required to remedy a significant negative effect of the project whereas enhancement measures are those that are available to further improve the project proposed. However, in many cases it is possible for measures implemented originally to mitigate a negative effect to perform sufficiently that they result in an enhancement of the project.

5.4.2 These measures are considered to be additions to the project rather than integral parts of it. For example, the provision of the primary school is not considered to be a mitigation measure as it is an integral part of what is being proposed and permission sought for.

Baseline Conditions

Population Demography

5.4.3 According to the 2001 Census, the study area had a population of 30,008 (see Appendix 5.1). Analysis of ages shows that the study area has approximately 2.5% more people in the 30 to 49 age bracket compared to the local authority and Welsh averages. The study area also has slightly higher proportions of children. Correspondingly, all other age brackets are below average, particularly the 75+ age bracket.

5.4.4 Experian estimates of population growth in the study area (see Appendix 5.1) largely reflects local authority and Welsh averages with increases in the proportion of people in older age brackets and reductions in those in the middle age brackets (in particular in the 35-44 age bracket).

- 5.4.5 The ONS mid-year estimates of population suggest that the study area population reached 44,600 in 2007, an increase of 48.63% in just six years. This substantial levels of growth is anticipated to continue, reaching 51,968 in 2027, an increase of 16.52% in twenty years.
- 5.4.6 The 2001 Census indicates that the study area is in significantly better health than the rest of the local authority and Welsh averages. Some 68.23% of the study population stated they were in good health in comparison to the local authority average of 63.52%. The study area also has a correspondingly low proportion of the population suffering from limiting long term illness in comparison to the local authority average, 19.85% and 25.00% respectively.
- 5.4.7 The 2001 Census indicates that the population in the study area are relatively well educated and qualified in comparison to the local authority and Welsh averages. In particular, the study area has some 22.21% of the population qualified to level 4 or 5 (degree or higher) in comparison to the local authority average of just 15.68%.

Employment and Economy

- 5.4.8 The 2001 Census (see Appendix 5.1) shows that study area economics activity largely reflects the local authority and Welsh averages. Unemployment has risen in recent months as it has across the country. Similarly, it is the elementary and customer service occupations that are most significantly affected. The 2001 Census also shows that the study area closely reflects the local authority and Welsh averages in terms of average hours worked.
- 5.4.9 Occupation data from the 2001 Census indicates significantly higher proportions of the economically active population are in senior occupations in comparison to the local authority and Welsh averages. For example, the study area has 14.04% 'managers and senior officials' in comparison to the local authority average of 11.97%. Correspondingly, there are higher levels of lower level occupations in the local authority.
- 5.4.10 According to the 2001 Census, car ownership in the study area is particularly high. The proportion of households with two cars is 27.62% in comparison to the local authority and Welsh averages of 22.73% and 22.94% respectively. Reflecting this high car ownership, a higher proportion of study area residents use private cars to travel to work. Surprisingly however people tend to travel significantly shorter distances with 28.99% of residents travelling less than 2km to work in comparison to local authority and Welsh averages of 21.35% and 20.83% respectively.
- 5.4.11 The Employment Land Report¹⁷ identifies the following sectors as the strengths of the Bridgend economy:
- Construction and related industries;
 - Pharmaceuticals;
 - Plastics;
 - Automotive;
 - Software and IT call centres.

¹⁷ Robert Chapman Associates. (2006). Bridgend Employment Land Review. BCBC and WAG.

5.4.12 This however differs slightly from the description given in 'Wales: A Vibrant Economy', which suggests that the key sectors are:

- High technology;
- Automation;
- Aerospace;
- Agrifood;
- Tourism;
- Financial services; and
- Creative industries.

5.4.13 The 2001 Census shows that the proportion of economically active people in each sector largely reflects the local authority and Welsh averages. The most notable differences are the higher proportions (approximately 1.5% to 2%) in 'Real Estate, Renting and Business Activities', 'Public Administration and Defence, Social Security' and 'Education'. The Annual Population Survey (see Appendix 5.1) shows that, in terms of employment activity, public administration, education and health sectors have seen considerable growth in the County in recent years and is now the biggest employment sector at 34%.

5.4.14 Economic forecasts produced by Cambridge Econometrics to support the emerging LDP indicate that employment is anticipated to grow by 3,850 by 2021. The largest areas of growth are in the service sectors, reflecting increases nationally. Also reflecting the national picture, manufacturing is expected to decline by 13% but still provide some 14% of employment in the County Borough.

Employment Land Supply and Demand

5.4.15 The emerging LDP, in accordance with Planning Policy Wales, seeks to ensure sufficient provision of suitable land for employment to meet future demand. It notes that in 2006, 217 hectares of employment land was identified for Class B1, B2 and B8 Uses within the County Borough. Recent trends between 2001 and 2006 indicate that the take-up rate of industrial land is approximately 7 hectares per annum. This is therefore sufficient land supply in overall terms to meet demands up to 2037, significantly beyond the LDP period up to 2021. It is anticipated in the emerging LDP that just 114ha would be sufficient, or 165ha if consideration is given to longer terms trends since 1985.

5.4.16 Due to its strategic location on the M4 corridor, Bridgend serves as a major employment area for the wider sub-region with a number of well established industrial estates. Whilst largely developed, these estates still have considerable room for infill development. In addition, as part of the EU Convergence Programme funding is being made to create further employment at the identified Brocastle, Island Farm and Waterton sites. It's not surprising therefore that existing employment base is concentrated in the southeast of the County Borough with 64% of the available employment land located within Bridgend. Only 17% of available employment land is located within the valleys, a substantial part of which is very constrained.

5.4.17 This is of particular significance due to the high levels of deprivation found in the valley areas to the north. Developing land in the south to meet the employment needs of the south would

have serious implications for levels of congestion, journey times as well as individuals finances.

- 5.4.18 The employment land report from 2006 identified that in general demand is exceeding supply for both office and industrial premises which has led to significant speculative development in the office sector. However, given the current global recession and tightening of funding to developers, it is highly unlikely that this will continue in the near future.
- 5.4.19 As of 2006, 60% of the immediately available employment land was in public ownership, highlighting the key role of the public sector in bringing forward difficult parcels of land and removing obstacles to growth.
- 5.4.20 Consequently, as set out in the emerging LDP, more than 120ha of employment land is currently forms part of the Council's 'Fit for Future' regeneration strategy, jointly commissioned with WAG. One of the strategic aims of this is to strengthen and renew infrastructure in order to facilitate development. Sites to benefit from this include Pencoed Technology Park, Brocastle Bridgend, Ty Draw Farm, Pyle, Island Farm Bridgend (the project site), Brackla Bridgend and Waterton Bridgend, as well as a major redevelopment project and opportunity at "Parc Afon Ewenni" Bridgend.

5.5 Island Farm Allocation

- 5.5.1 This site is allocated in the emerging LDP as an extension to the existing science park for high technology uses. The allocation covers some 26ha in Council ownership.

Open Space and Leisure

- 5.5.2 The emerging LDP notes that the Council operates and contracts a range of indoor sport and recreation facilities including seven swimming pools, five sports centres and 21 community centres which offer more formal facilities (and a wide range of school recreational activities). A review of these facilities was undertaken in 2007, which recommends various changes aimed at encouraging participation in local sports and physical activity. It recommends a hierarchy of future facility provision and input to the school modernisation process, to ensure full and open community use of educational facilities, and additional sporting provision to meet community needs within any new or refurbished school. In addition to a rolling programme of selective refurbishment of existing sports halls and swimming pools, the Review recommends:
- The provision of a new 400m synthetic athletics track;
 - The possibility of developing a new indoor bowls hall on an alternative site;
 - Development of all weather training facilities/MUGAS in Pyle and Maesteg;
 - The development of a full size flood lit STP in Bridgend; and
 - Improving, promoting and developing walking and cycling opportunities, and other appropriate uses of the natural environment.
- 5.5.3 Two audits undertaken in 2006 of outdoor sport facilities and children's play space found that there are significant quantitative shortfalls in open space in the Bridgend sub-area, which is likely to be exacerbated by the continued rapid growth of the population. It is therefore

essential that open space is increased during the LDP period to ensure the quality of life of existing and new residents is sustained.

- 5.5.4 Also during the LDP period the Council intends to create 'Community Hubs; that will bring together vital community uses in one highly accessible location within the area they serve.

Professional Sport

- 5.5.5 Currently the Celtic Crusaders rugby league team and Bridgend Ravens rugby union team the Brewery Field sports ground. The record attendance at this location is a little over 6,000. Until earlier this year the ground was owned by the Celtic Crusaders but has now been purchased by a consortium including the Bridgend Ravens and Bridgend Town Football Club.
- 5.5.6 The ground does not meet current standards for the rugby Super League and so it is necessary for the Celtic Crusaders to find an alternative location. The team announced on 21st August 2009 that they would be moving to Rodney Parade, home of the Newport Gwent Dragons', for the next two seasons. The intention then is to return to Bridgend and occupy a new purpose built stadium.

Tourism

- 5.5.7 The emerging LDP notes that the tourism sector is of growing local importance with an estimated 3,319 direct full-time equivalent jobs with another 1,349 indirectly involved. The 2005 Annual Business Inquiry estimated that 3,500 jobs, 6.3%, within the County Borough are tourism related. This is, however, substantially below the Welsh average of 8.4%.
- 5.5.8 In 2006 there were 3.77 million visitors to the County Borough. Approximately 85% of these were day visitors with only 4.3% of visitors staying in serviced accommodation.
- 5.5.9 The Council's Tourism Strategy (2002-2006) states:

"Various studies in the past have highlighted the need to develop attractions (particularly non-weather dependent). This is supported by comments from respondents in a number of surveys. Although the marketing partnerships with adjacent local authorities allow benefits to be gained from the combined mass of attractions in South-East Wales, this weakness remains a pertinent consideration for Bridgend County Borough and Porthcawl in particular.

- 5.5.10 This strategy identifies the need to address the issue and consider the feasibility of new all – weather attractions being developed in the County Borough.
- 5.5.11 The development of an annual programme of events has the potential to provide an attraction for visitors. This is specifically noted in both the national and regional strategies. This could possibly counteract weaknesses in the attraction and facility base.
- 5.5.12 The Rugby World Cup in 1999 had a positive effect on the decline in visitor numbers and the Ryder Cup will have a dramatic impact on visitors in the second half of this decade. The percentage decrease in numbers of visitors staying in serviced accommodation in 1999 compared to 1998 was less (5%) than the percentage decrease of 1998 compared to 1997 (9%). The monthly visitor occupancy figures for October and November for 1999 show a marked increase over the same period in 1998."

5.5.13 The Regeneration Strategy (June 2008) noted:

“Bridgend CB already has a strong reputation for activity sports, in particular golf and watersports. This action will build on existing capacity and expertise, working closely with neighbouring areas with similar facilities, to develop and market plans for high profile, prioritised programme major events: the first actions will be developed from existing proposals to attract wide international coverage and knock-on tourist and leisure investment opportunities, through golf, watersports and music events.

Bridgend CBC will take forward this action, to engage stakeholders and build practical outputs into the new brand for Bridgend CB.”

5.6 Predicted Effects

Construction Effects

Employment

- 5.6.1 It is estimated that it would cost approximately £50m to construct the sports and leisure elements of the project over 3.5 years with a further £30m for the extension to the science park over 6 years.
- 5.6.2 Using a figure of £92,500 to support a single construction job per year based on a study undertaken by GLA Economics, it is estimated that the sports and leisure elements would support 154 jobs per annum whilst the science park extension would support 54 jobs per annum.
- 5.6.3 It is generally accepted that 10 years of construction jobs is equivalent to one full time job. Therefore, the total number of 208 jobs per annum would equate to 21 FTE jobs.
- 5.6.4 In the context of the substantial level of construction that is occurring in South Wales this is considered to be a positive minor effect of the project.

Local Business and Residents

- 5.6.5 The location of the proposed development site is such that there is a degree of separation between it and most residential and business areas. Construction is likely to be intermittent with the science park buildings coming forward as the market dictates.
- 5.6.6 Based on these two issues and the conclusions set out elsewhere in this ES, it is anticipated that the level of disturbance in the local area by way of the cumulative effects of dust, noise and traffic will be limited. Therefore, during periods of heightened activity, such as if elements of the science park are constructed at the same time as the sports and leisure elements, the effect would be of minor adverse significance but temporary in nature. In periods of low or no activity the effect would be negligible.

Operational Effects

Direct Employment

5.6.7 The principle areas of direct employment are (see Appendix 5.2 for details) :

The Stadiums

5.6.8 Information provided by the Clubs suggests that current levels of non-playing staff are unlikely to increase substantially. Therefore it is assumed that 17 jobs will be retained. In addition, it is anticipated that a further 10 jobs will be required to manage the three stadiums.

5.6.9 These 27 jobs will be based on the 15,000-seat stadium, which also includes a considerable amount of office space. It is unlikely that all 27 would require office space as they would include groundsmen etc. However, to reflect a worst-case it is assumed that they will. This therefore suggests 3,812m² of the 4,325m² would be available to be rent to local business. It is estimated using a standard employment multiplier of 19m² per office job that this would support a further 201 jobs.

5.6.10 In terms of additionality, the existing 17 jobs are disregarded as they form part of the base case, suggesting a gross impact of the stadium of 211 jobs. Given the considerable growth in population anticipated in the near future, it is assumed that both leakage and displacement would be relatively low. The economic multiplier effects of the office are anticipated to be moderate.

5.6.11 Based on this it is anticipated that the stadiums would have a net effect of 156 additional jobs in the study area. That is, of the 211 jobs created 142 would go to people in the study area. The effect of those people spending their wages is estimated to support a further 14 jobs in the study area.

The Sports Centre and Tennis Centre

5.6.12 Using a standard employment multiplier of 90m² per sports centre job, it is estimated that the sports centre would support 112 jobs. Using the same low levels of leakage and displacement, and a moderate economic multiplier, it is estimated that the sports centre would have a net effect of 83 additional jobs in the study area.

5.6.13 The same employment multiplier is used for the Tennis Centre suggesting it would support 160 jobs. Again, the same levels of leakage, displacement and economic multiplier are applied indicating a net effect of 119 additional jobs in the study area.

Science Park Extension

5.6.14 Using a standard employment multiplier of 32m² per job for science parks, it is estimated that this will support 610 jobs. Due to the considerable employment growth projected for the study area, the same low levels of leakage and displacement are anticipated, again a moderate economic multiplier. This suggests a net effect of 453 additional jobs in the study area.

Match Day Employment

5.6.15 It is estimated that the project will support 1,093 jobs (excluding the 17 jobs already supported by the sports clubs), which will result in 818 additional jobs in the study area. These estimates

do not take account of match day employment, which can also be significant.

- 5.6.16 Currently approximately 300 part time staff are employed on match days at Brewery Field. It is difficult to estimate how this will increase with the project. As a very approximate estimate, the Crusaders new stadium is three times the size of Brewery Field, which could suggest an equally substantial increase in employment equating to 1,500 part time staff. Given the size of the site, the potential for other events to be occurring simultaneously, and professional experience of other stadium developments, would suggest to reasonably accurate.
- 5.6.17 This type of work is unlikely to be sufficient as a main income. However, it does provide a very important 'top-up' income to many people who would otherwise not be economically active. This includes those classed as students, retired and usually looking after home/family. The importance of such additional income cannot be underestimated as it is so often accessible to groups that would otherwise find it difficult to find any employment.

Summary

- 5.6.18 The direct result of the project is estimated to be 1,093 jobs (818 in the study area) plus a further 1,500 match day jobs. In the context of rising unemployment and rapidly expanding population, the need for further employment opportunities in the study area is very high. On the basis of this sensitivity, the effect of the project is positive and of major significance.

Spectator Expenditure

- 5.6.19 Whilst it is likely that sports events of various sorts are likely to occur on the project site, the principle spectator attractors will be the three stadiums. Others events anticipated include:
- Local football and rugby matches using the training pitches.
 - The tennis centre is anticipated to include a central court with raised seating, which is likely to be used for competitions or showcase matches.
 - The boxing club will likely have small spectator events.
- 5.6.20 Three scenarios for both the project and baseline (i.e. Brewery Field) have been used to estimate the potential expenditure generated by spectators. To reflect the widest range possible:
- The high base case is subtracted from the low project case;
 - The medium base case is subtracted from the medium project case; and
 - The low base case is subtracted from the highest project case.
- 5.6.21 In some cases the first of these scenarios has led to a negative figure. The likelihood of this actually occurring is highly unlikely, but is included in Table 5.2 to reflect the range of effect possible.

Table 5.2: Spectator Net Additional Expenditure

Measure	Low Case (Low Project – High Base)	Medium Case (Medium Project – Medium Base)	High Case (High Project – Low Base)	Mean Value
Crusaders Home Spectators	-£259,776	£836,055	£2,212,452	£929,577
Crusaders Away Spectators	£264,726	£791,406	£1,485,540	£847,224
Crusaders Away Spectators (1 hotel night)	£36,248	£241,732	£724,869	£334,283
Crusaders Away Spectators (2 hotel nights)	-£21,097	£203,056	£640,937	£274,299
Crusaders Total	£20,101	£2,072,250	£5,063,798	£2,385,383
Ravens Home Spectators	-£488,639	£65,835	£661,939	£79,712
Ravens Away Spectators	-£121,958	£20,482	£172,200	£23,575
Ravens Total	-£610,597	£86,317	£834,139	£103,286
Bridgend Town Home Spectators	-£175,874	£947,529	£2,309,076	£1,026,911
Bridgend Town Away Spectators	£360,927	£896,927	£1,563,660	£940,505
Bridgend Town Total	£185,054	£1,844,456	£3,872,736	£1,967,415
Grand Total	-£405,442	£4,003,023	£9,770,673	£4,456,084

- 5.6.22 Based on these calculations, it is likely that spectators visiting the three stadiums are estimated to generate on average £4.46m additional expenditure per annum in the study area. Note that these calculations do take into account expenditure that occurs within the stadium to avoid double counting. Using a standard calculation based on the ratio of UK GDP to total employment, it is estimated that this would support approximately 91 jobs additional jobs in the study area.
- 5.6.23 Overall, this level of employment supported by the project is considered to be a significant moderate positive effect.
- 5.6.24 These calculations are of course focussed on those visiting the area to watch a sporting match. However, each away supporter attracted into the area by a sporting event is a potential tourist in the wider sense. In the next section consideration is given on how the project can be utilised to maximise the number of return visits to the study area.

Business Expenditure

- 5.6.25 Any business will need to buy-in supplies and services, and sports clubs are not exception. Information of current or projected expenditure of supplies and services is not available from

the Clubs. However, research undertaken in North West England can be used as an approximation.

- 5.6.26 The Warrington Wolves provided an approximate breakdown of expenditure for the research. Their ground, the Halliwell Jones Stadium, has a capacity of 14,206 and so is directly comparable to the new Celtic Crusaders stadium. The Warrington Wolves are also in the same league as the Celtic Crusaders. Table 5.3 sets out the expenditure breakdown.

Table 5.3: Warrington Wolves Expenditure Breakdown

Expense Area	Amount
Merchandise and Kit	£858,000
Utilities	£342,000
Catering	£341,000
Printing and Stationary	£236,000
Professional Services	£217,000
Security (including Police)	£203,000
Travel	£200,000
Cleaning	£165,000
Stadium (non construction)	£84,000
Medical/Supplements	£64,000
Miscellaneous	£58,000
Total	£2,768,000

- 5.6.27 The research then split this within geographical areas, showing that 39% within Warrington itself with a further 6% retained in Cheshire and 27% in the North West. Warrington is a considerably larger and more populated Borough in comparison to the study area. Using simple ratios there it is assumed that a third (13%) would be retained within the study area, equating to £359,840. However, South Wales is likely to be able to capture a similar amount to the North West Region, suggesting £1.99m would be retained within commuting distance of the study area.
- 5.6.28 Using the same assumptions as above it is estimated that this £359,840 would support a further 7 jobs in the study area.
- 5.6.29 All other businesses occupying the project, including the extension to the science park, will create expenditure in the study area by purchasing supplies and services. It is impossible at this stage to estimate the magnitude of effect that this would have. However, in light of the estimations made above in relation to the Crusaders effect, total business expenditure in anticipated to be a minor positive effect of the project.

Employment Land

- 5.6.30 The project would result in the development of 8.272ha of the employment allocation as an extension to the existing science park. This is estimate to support 610 jobs. Using this as a ratio of likely employment generation, it can be assumed that the 17.28ha of the allocation lost of the project could have generated 1,274 jobs as opposed to the 492 jobs supported by the rest of the project, a difference of 782 jobs.
- 5.6.31 However, the development of the site as a larger extension to the science park would not have the multiplier effects that the proposed project has, which are estimated to generate at least another 98 jobs through expenditure plus a further 1,500 match day jobs. Therefore, the difference in job creation is likely to be minimal and the objective of the employment land allocation (i.e. to facilitate employment) is not undermined.
- 5.6.32 It should also be recognised that there is a considerable oversupply of employment land in the County Borough with too much focus on Bridgend. Sites allocated in UDP Policy E6 are not given the added protection from development by alternative use as set out in UDP Policy E7.
- 5.6.33 Overall therefore the impact on employment land supply is considered neutral.

5.7 Summary and Conclusions

- 5.7.1 The following is a list of the significant effects identified above:
- The construction of the proposed development would support 21 full time equivalent. This is a significant minor positive effect of the project.
 - The level of disturbance to local residents and business is considered to be negligible to minor adverse.
 - The proposed development will directly support 1,093 jobs, of which 818 would go to people within the study area. The proposed development is also anticipated to support approximately 1,500 match day jobs. This is a significant major positive effect of the project.
 - Spectator expenditure is estimated to equate to £4.46m per year in the study area which would equate to a further 91 jobs in the study area. This is a significant moderate positive effect of the project.
 - Business expenditure is estimated to be at least £360,000 per year in the study area, which would equate to a further 7 jobs in the study area. This is a significant minor positive effect of the project.
 - The effect of the project on employment land supply is considered to be neutral.