monmouthshire
sir fynwy

Monmouthshire Local Development Plan 2020

RETAIL BACKGROUND PAPER

March 2021

Monmouthshire County Council
Local Development Plan

2020 Retail Background Paper
March 2021

Enterprise Directorate

Planning Policy Service

Monmouthshire County Council

County Hall

Usk

NP15 1GA

Tel. 01633 644644

E-mail: planningpolicy@monmouthshire.gov.uk

CONTENTS

Appendices

Front Cover Photographs Clockwise from Top Left:
Cross Street, Abergavenny
Newport Road, Caldicot
Church Street, Monmouth
St Mary Street, Chepstow

1. INTRODUCTION

1.1 In 1993 the former Monmouth Borough Council commenced its first vitality and viability study of the main towns within Monmouthshire based upon the criteria set out in Planning Policy Guidance Note 4, Town Centres and Retail Development. The first study, published in 1994, formed the Shopping Background Paper to the then Deposit Monmouth Borough Local Plan. Subsequently, the Council has conducted these studies on an annual basis, which now provide a valuable time series of data; the latest data available is for 2020.

1.2 The retailing experiences of Monmouthshire's main towns over recent years have reflected many of the development pressures and market changes experienced within retailing nationally. The continued decline of independent grocers, the pressures for out of town supermarkets, and town centre redevelopments have all been experienced within the County to a greater or lesser extent. In more recent years, service uses have also begun to occupy town centres on a much larger scale, whilst comparison uses have declined gradually.

1.3 In 2020 town centres across the UK have been impacted by the Covid-19 global pandemic and the Welsh Government publication 'Building Better Places, The Planning System Delivering Resilient and Brighter Futures, Placemaking and the Covid-19 recovery' (July 2019) acknowledges this. In Monmouthshire, the impact of lockdown restrictions throughout 2020 on retail centres and non-essential retailers was evident at the time of the survey where many retailers had limited trading hours or were offering takeaway service only. Decreased footfall in all town centres within Monmouthshire also reflect the impact that the pandemic has had. At the time of the survey in mid-November, Wales had just come out of a 'firebreak lockdown' and premises such as restaurants, cafes, pubs, non-essential retailers and gyms were all permitted to re-open. The results of the survey illustrated in this report are correct as of November 2020, however it is acknowledged that high street retailers such as Peacocks and Edinburgh Woollen Mill amongst others, have since gone into administration. The 2021 survey will likely reveal the full impact of the pandemic upon retail centres in Monmouthshire.

1.4 Current Government planning policy or planning policy guidance as it relates to retailing and town centres is provided by Planning Policy Wales, Edition 11 February 2021, Chapter 4. At a local authority level retailing is addressed in the Adopted Local Development Plan (LDP) through Strategic Policy S6 – Retail Hierarchy and in the Development Management Policies RET1 – Primary Shopping Frontages, RET2 – Central Shopping Areas, RET3 – Neighbourhood Centres and RET4 – New Retail Proposals. Further guidance regarding the implementation of Policy RET1 within the LDP is set out in Supplementary Planning Guidance – Primary Shopping Frontages.

2. MEASURING VITALITY, VIABILITY AND ATTRACTIVENESS

2.1 Introduction

2.1.1 A separate detailed technical guide to the Annual Retail Study has been prepared. This outlines the main procedural requirements for this report and is intended primarily for those undertaking the survey.

2.1.2 Planning Guidance (Wales) Technical Advice Note 4, Retail and Commercial Development considers at paragraph 13.3 the information of value in measuring vitality, attractiveness and viability of town centres. These indicators include among others:

2.2 The Diversity of Uses

2.2.1 The diversity of town centre uses is a measure of how much space is in use for different functions, such as: offices; shopping; other commercial; cultural and entertainment activities; restaurants; hotels; educational uses; housing and how that balance has been changing. It is acknowledged that town centres should provide a range and quality of services and activities to the local population, visitors and investors. A wide diversity of uses provides for a more vibrant town centre.

2.2.2 This Background Paper approaches the measurement of the diversity of town centre uses as an analysis of the number of comparison, convenience and service outlets and their floorspace. For the purposes of this background paper the following outlets are included within these categories:

Convenience outlets:	Supermarkets, off-licences, grocers, bakers, butchers and newsagents;
Comparison outlets:	General retail outlets, showrooms and D.I.Y;
Service outlets:	Banks, building societies, hotels, estate agents, solicitors, offices, post offices, restaurants, cafes and take-aways.

2.2.3 A survey of the current uses in the Central Shopping Areas of the four county towns, the three local centres and neighbourhood centres is undertaken on an annual basis, the Council has conducted more than fifteen such surveys with the earliest dating back to 1994.

2.3 Retailer Representation, Demand and Intentions to Change

2.3.1 This is an analysis of the present representation and demand from retailers wanting to come into a town, to change their representation in the town, or to contract or close their representation. The location of national multiple retailers within a town centre is a fairly good indicator of how a town centre is performing on the premise that major companies will invest where they can achieve a reasonable turnover / profit.

2.3.2 This Background Paper addresses the issue of charity shops under this heading. The growth of charity shops is often viewed as a symptom of a declining town centre, particularly where they replace other forms of retail provision. The number of charity shops can therefore represent a town centres vulnerability to long-term decline. However, some charity shops such as Oxfam and Marie Curie which operate nation wide often retail as a modern and attractive store, investing in their premises and attracting levels of footfall comparable with other town centre uses. Therefore, the measure of charity shops in a town centre included in this study should be treated with caution, and examined in the wider context of how the town is performing in other areas.

2.4 The Proportion of Vacant Street Level Property

2.4.1 The number of vacant units within a town centre is often considered as an indication of how well a town is trading. However, the Government advises that although vacancies are a useful guide for measuring vitality and viability, they can arise in the strongest of centres.

2.4.2 A survey of the number of vacant ground floor properties in the Central Shopping Areas of the four county towns and the three local centres is undertaken on an annual basis, the Council has conducted more than fifteen such surveys with the earliest dating back to 1994.The vacancy levels are analysed as to whether they are in primary or secondary locations. The definition of primary and secondary frontages depends crucially on local circumstances; however a primary frontage is usually considered to be one that is located on a main retail thoroughfare. Planning Policy Wales at paragraph 4.3.31. states that primary frontages are characterised by '…a high proportion of A1 retail uses…' whilst '…secondary areas typically contain mixed uses, for example shops, cafes and restaurants, financial establishments and other services and community facilities.'

2.5 Pedestrian Flow

2.5.1 Pedestrian flow is the measurement of the number of movements of people on the streets, in different parts of the centre at different times of the day, and changes over time. The value of the data is in its comparison with past results and in its ability to establish trends going forward.

2.5.2 A survey of pedestrian flow is carried out in October each year, the methodology used is the same to provide for consistent comparison. Fieldwork spans a two-week period; this minimises the risk of any bias in the findings that could be caused by unusual conditions during a single week such as adverse weather or any special events in the area.

It also reduces the likelihood of encountering the same people on each fieldwork day, therefore providing a more accurate count of footfall.

2.5.3 Key points in a town centre are identified, then two separate five minute counts are conducted within an hour at each point. The counts are taken from 10 o'clock in the morning until 3 o'clock in the afternoon. The times when field workers record footfall is rotated during the course of the day and moved onwards by increments of 10 minutes. This limits any bias in footfall numbers that may result at specific times of the day (e.g. on the hour, on the half hour), such as the arrival of public transport services or the beginning and end of workday lunch hours.

2.5.4 As a count is taken for only ten minutes in any hour the figures are then adjusted to give an overall count for the movement of people in any hour. Counts are taken on a Saturday, a peak and a non-peak day. A peak day would be a weekday where a market is being held in the town leading to an increased flow of pedestrians.

2.6 Accessibility

2.6.1 The ease and convenience of access by a choice of means of travel, including the quality, quantity and type of car parking, the availability of public transport services and the quality of provision for pedestrians and cyclists.

2.7 Environmental Quality

2.7.1 This includes information on air quality, noise, trees, landscaping, open spaces, litter and graffiti, where available.

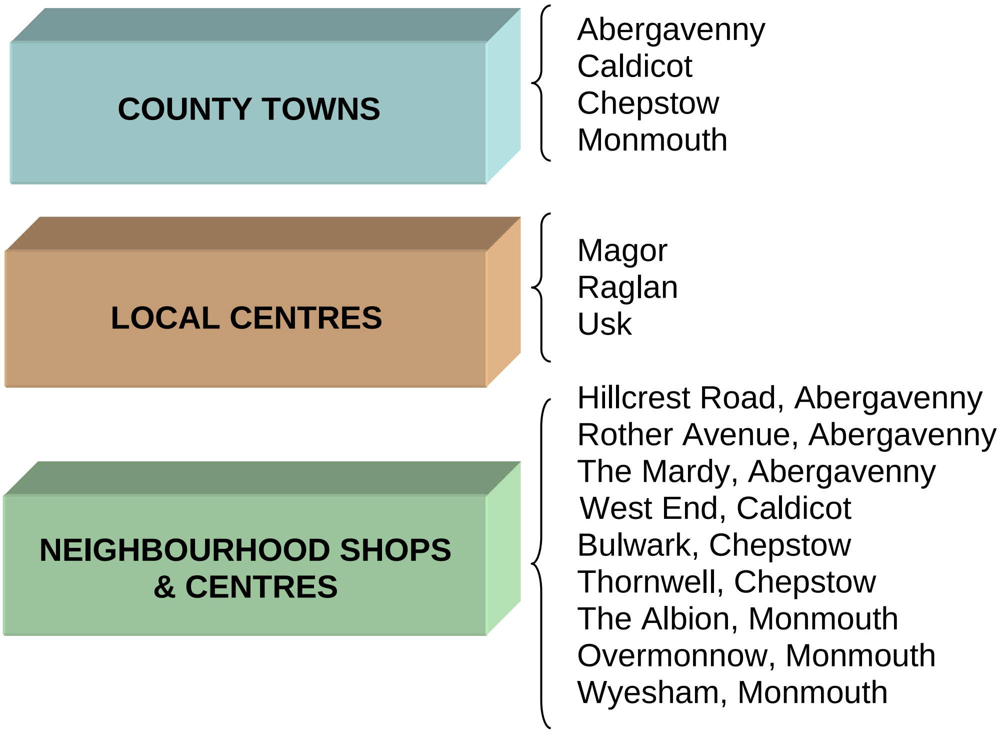
2.8 Customer Views and Shopping Patterns

2.8.1 Regular surveys of customer views, including their stated preferences for where they shop for certain goods, assist authorities in monitoring and evaluating the effectiveness of town centre improvements and of town centre management. The Council have conducted a series of household surveys over the past 20 years looking at the shopping patterns of people living in our main towns. The first survey was undertaken in 1997, this was then repeated in 2006 and then again in 2009 as part of a larger Retail and Leisure Study which was undertaken as a background study for the Local Development Plan, the latest survey was conducted in November 2015. The surveys follow a broadly similar methodology so whilst not allowing for an exact comparison they do give some indication, over time, of changing shopping habits.

3 THE RETAIL HIERARCHY

3.1 Within Monmouthshire a long established retail hierarchy exists categorising town, district and local centres in accordance with the population each centre serves and the nature and scale of retail provision. The hierarchy of retail provision is wider than the centres within the County with both regional and sub-regional centres located within easy travelling distance of Monmouthshire.

3.2 Monmouthshire's retail hierarchy has been established in the Adopted Local Development Plan and is set out below.



3.3 Within Monmouthshire there are four principal County Towns, namely Caldicot and the three traditional market towns of Abergavenny, Chepstow and Monmouth. These towns provide a broad range of facilities and services associated with a traditional town centre and serve an area beyond the immediate town area itself. There are three local centres within the hierarchy, which represent small towns and larger villages who provide a range of retailing and services primarily for the local population. There are a number of Neighbourhood Centres within the County, which represent district-shopping locations separate from the town centre. Neighbourhood Centres vary in size and location and can comprise of a large centre such as Bulwark in Chepstow or form individual neighbourhood stores such as Wyesham in Monmouth, reflecting the retailing requirements of the local neighbourhood.

3.4 This report will consider each of the towns in turn, with a cross town comparison of the key measures of vitality and viability provided at Appendix C.

4. ABERGAVENNY

4.1 Background

4.1.1 Abergavenny is situated in the north west of the County on a main trunk route providing access to Wales from the Midlands and wider UK. Abergavenny itself has a population of approximately 14,000 (2011 Census) which increases to 15,800 when the nearby community of Llanfoist is included.

4.1.2 The town centre is based around a medieval street pattern and has a large concentration of retail, commerce and leisure activities, all of which serve a wider hinterland. Three days of the week there is a general market which attracts visitors from outlying villages and the South Wales Valleys. Several other markets are also held, including a farmer's market once a month, a craft fair once a month, and an antique and collectors fair on every 3rd Sunday of the month.

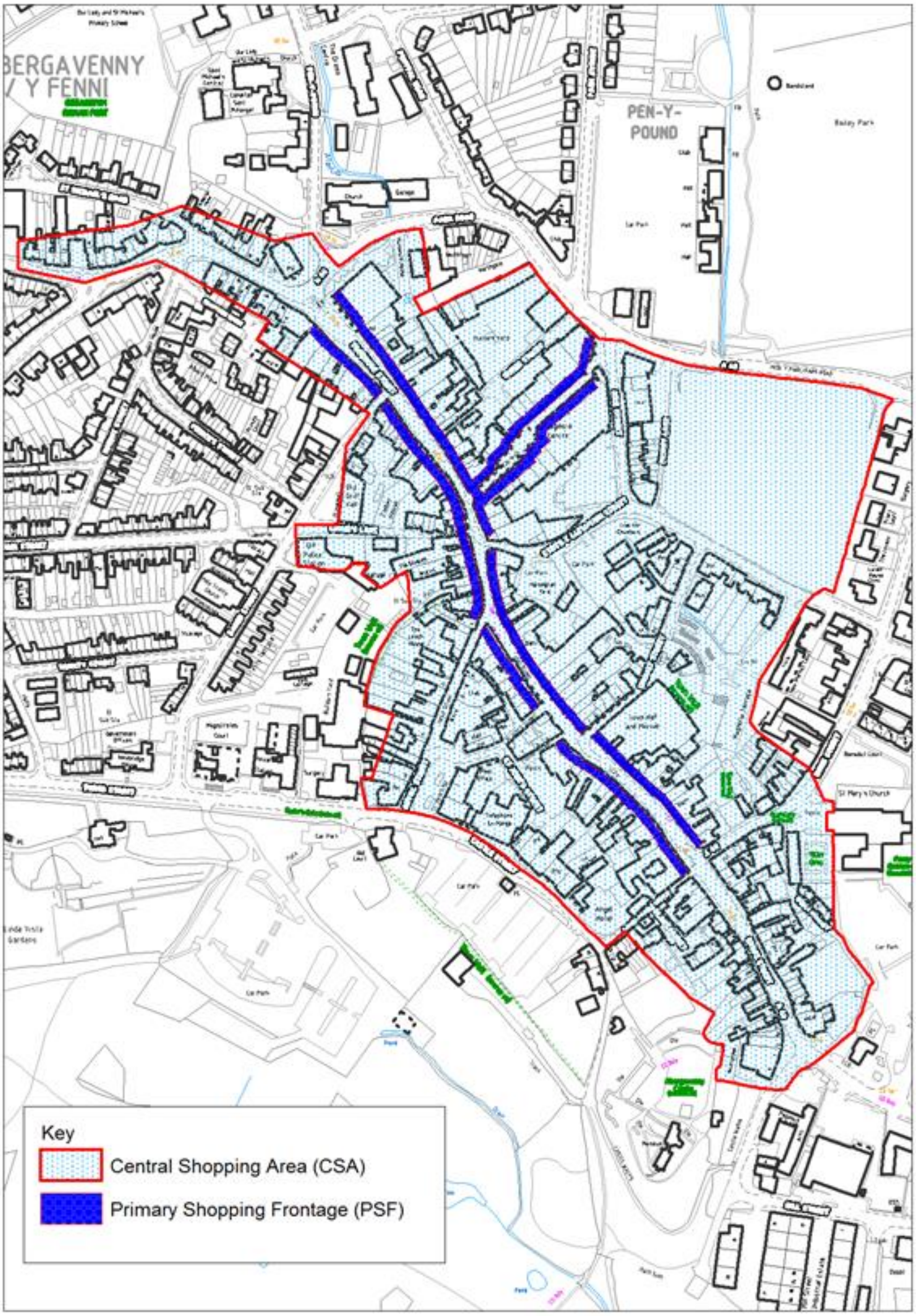
4.1.3 Policy RET2 of the Adopted LDP has defined for planning purposes the retail core of the town centre as a Central Shopping Area (CSA). The CSA relates to the central area, which provides a broad range of facilities and services and fulfils a function as a focus for both the community and public transport. However, the CSA is not exclusive to shopping and retailing activities exist outside of this area.

4.1.4 In addition to the above, the Adopted LDP also contains Policy RET1 - Primary Shopping Frontages (PSF) which specifically focuses on primary shopping frontages within the CSA and sets out the criteria for considering non-retail proposals within these frontages. The policy gives priority to retail (A1 uses) in the town centres' primary shopping frontages and seeks to protect the predominant shopping role and character of the main towns by controlling the loss of retail units within such frontages.

4.1.5 The Primary Shopping Frontages Supplementary Planning Guidance (SPG) was published in April 2016 and provides clarity for both applicants and the council in the interpretation and implementation of policy RET1. The SPG assists decision making by setting out guidance on the criteria based approach for assessing proposals for non-retail use classes in the County's primary shopping frontages. In particular, it provides clarity on the proportion of ground floor units in non-retail use that the Council considers acceptable within the specified frontages. The identified maximum thresholds for non-A1 uses in the County's primary shopping frontages are provided in Appendix E.

4.1.6 The extent of the CSA and PSF in Abergavenny is shown in figure 4.1 below.

Figure 4.1 Abergavenny Central Shopping Area (CSA) and Primary Shopping Frontages (PSF) (LDP)



4.2 Shopping Hinterland

4.2.1 The shopping catchment area for Abergavenny undoubtedly extends beyond the limits of the town and its immediate environs, and encompasses a wider area of influence or hinterland for shopping purposes reflecting its County Town status.

4.2.2 The shopping hinterland of Abergavenny covers a largely rural area, from Raglan and Llantilio Crossenny to the East and beyond Crickhowell to the West. The hinterland extends as far north as Llanthony and Grosmont and towards Penperlleni in the south (Appendix A). The 2011 census indicates a resident population of some 32,000 living within 13,800 private households within this area.

4.2.3 Using Paycheck data we are able to look at the profile of this resident population. The Paycheck dataset developed by CACI indexes annual household income from data available from the Census, and other market research including lifestyle surveys. Subsequently, it indicated that the mean income of households in the catchment area of Abergavenny in 2020 was £42,694, relative to £45,193 for the county as a whole, and £36,234 for Wales. Out of the households in the Abergavenny catchment area, 18% are below 50% of the median income for the UK, and 24% below 60%. This compares to 17% and 22% respectively for Monmouthshire, and 25% and 33% for Wales as a whole (Appendix B).

4.3 Diversity of Uses

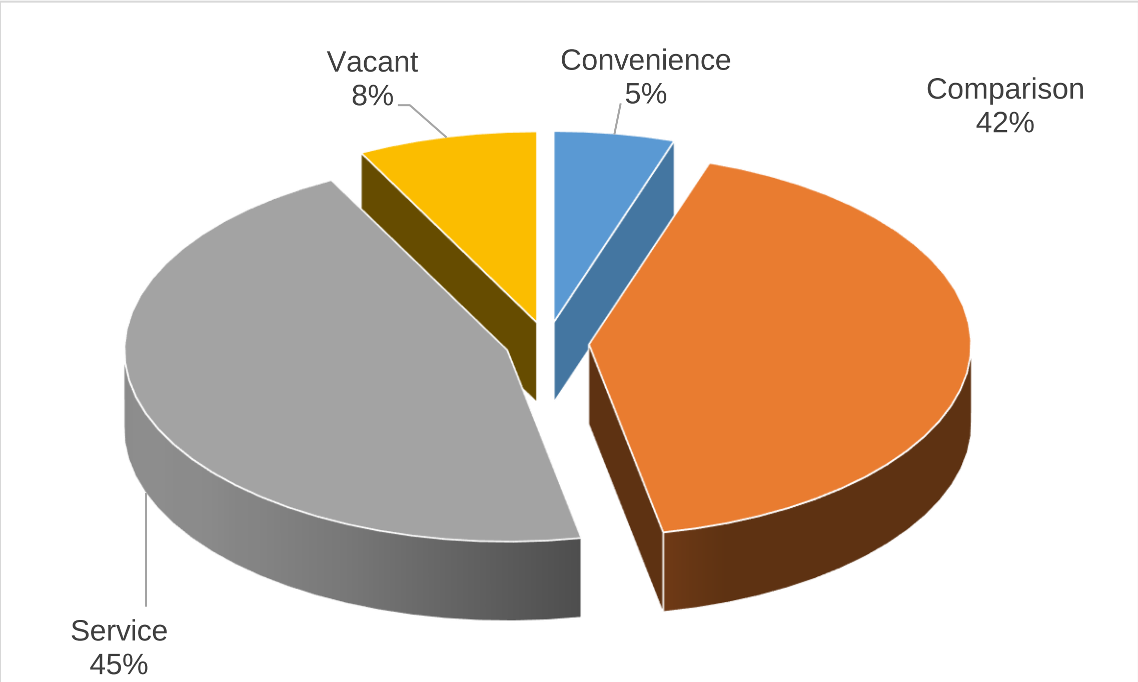
4.3.1 The 2020 retail survey demonstrated that comparison goods outlets accounted for 42.2% of Abergavenny town centre's retail and service uses, its lowest share to date and extending the trend of decline since 2017. Service uses have seen fluctuation in more recent years and after an increase since the previous survey and reflecting a trend of a growing proportion within the CSA, service uses account for a significant proportion of units (45.5%), the highest on record. This reflects the wide range of professional and financial services, restaurants and cafes associated with the centre of a historic market town with an appeal to a relatively wide catchment area. In contrast, the number of convenience outlets is considerably lower with a proportion of 4.7%. The opening of Morrison's on the old Cattle market site has helped maintain this proportion.

Figure 4.2 Number of Outlets within the CSA by Use Type over Time

Year	Comparison No.	Outlets %	Convenience No.	Outlets %	Service No.	Outlets %
2002	140	54.1	14	5.4	84	32.4
2005	129	52.7	21	8.6	83	34.6
2006	123	48.4	19	7.5	95	37.4
2008	117	45.9	17	6.7	99	38.8
2010	119	45.8	16	6.2	106	40.8
2012	119	45.6	15	5.7	108	41.4
2013	125	45.6	14	5.1	114	41.6
2014	130	47.8	17	6.3	111	40.8
2015	133	48.5	15	5.5	110	40.1
2016	125	45.3	15	5.4	112	40.6
2017	125	46.1	15	5.5	114	42.1
2018	123	44.9	16	5.8	122	44.5
2019	122	44.5	15	5.5	119	43.4
2020	116	42.2	13	4.7	125	45.5

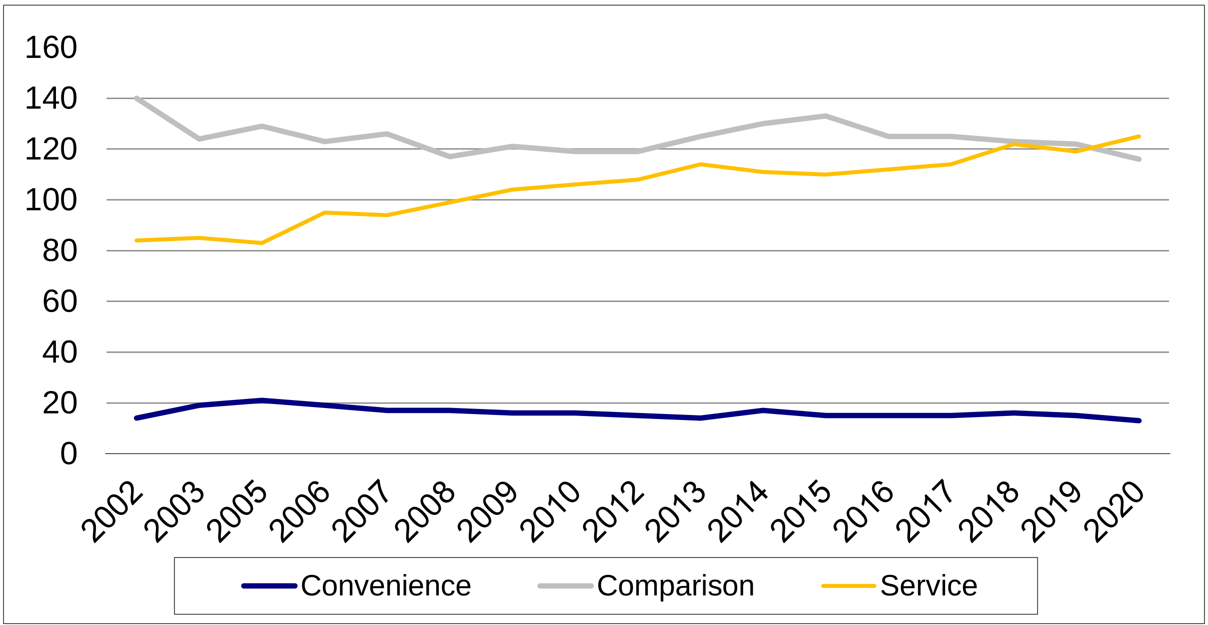
Note: Percentages include vacant units that are dealt with separately in section 4.6.

Figure 4.3 Percentage of Outlets within the CSA by Use Type



4.3.2 The key issue to arise from a comparison with previous survey findings is the decline in convenience and comparison goods outlets and the steady rise in service outlets. Planning Policy Wales Edition 10 states that '…primary areas are typically characterised by a high proportion of A1 retail uses…secondary areas typically contain mixed uses, for example shops, cafes and restaurants, financial establishments and other services and community facilities.' It goes on to suggest '…Policies should encourage a diversity of uses in centres' and that '…Vibrant and viable centres are distinguished by a diversity of activity and uses which should contribute towards a centre's well-being and success…'. In Abergavenny comparison outlets account for 56% of outlets in the Primary Shopping Frontage, this compares to 33% in the Secondary Shopping Frontage. In terms of service outlets, they only account for 30% of outlets in the Primary Shopping Frontage compared to 56% of outlets in the Secondary Shopping Frontage. This indicates that whilst comparison goods outlets have seen a decline in their share within the CSA in recent years, they still dominate the primary shopping frontage.

Figure 4.4 Comparison of the Number of Outlets within the CSA by Use Type over Time



4.3.3Figure 4.5 illustrates the diversity of use in the CSA with regard to floorspace.

Figure 4.5 Percentage over Time of Floorspace Use within the CSA

Year	Comparison %	Convenience %	Service %
2002	64	10	22
2005	62	13	22
2006	62	11	22
2008	62	11	23
2010	61	10	26
2012	55	14	26
2013	51	12	27
2014	51	13	31
2015	48	11	34
2016	50	11	32
2017	53	12	31
2018	47	19	29

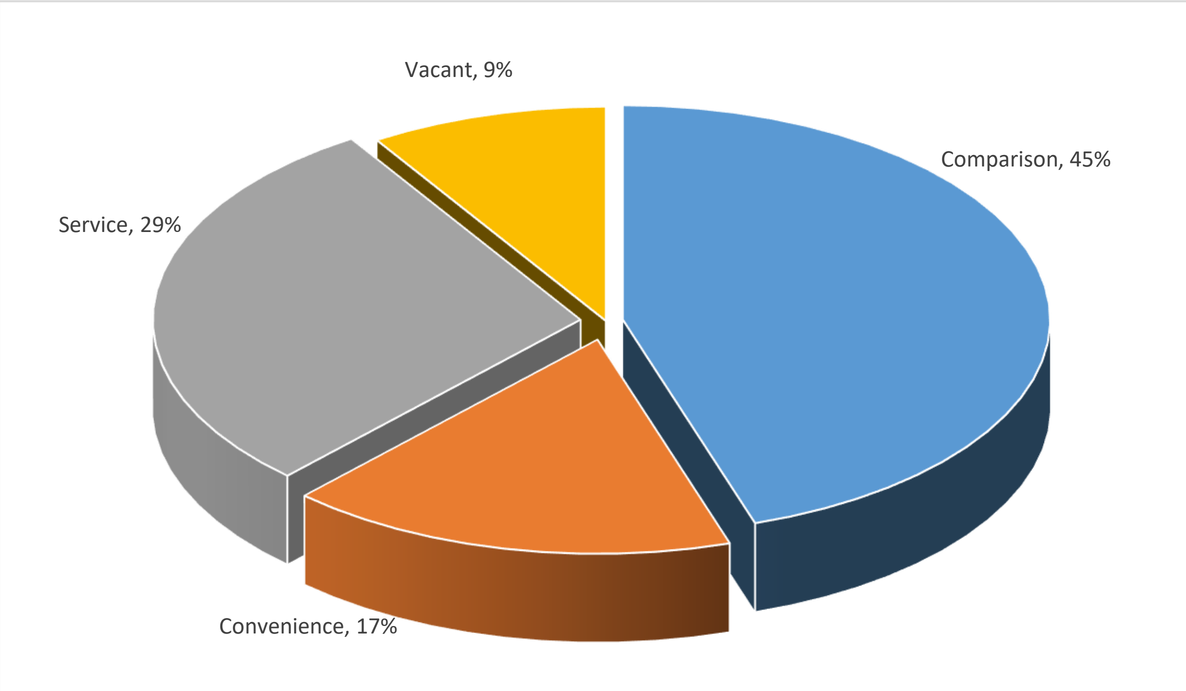
2019	47	17	28
2020	45	17	29

Percentage figures include vacant units which are dealt with separately in section 4.6

4.3.4 Abergavenny CSA as defined in the Adopted LDP has an estimated total net retail floorspace of over 29,700m^2 in 2020 of which nearly half is occupied by comparison goods outlets. Service uses account for the next largest proportion of retail floorspace at 29%, with convenience goods outlets accounting for 17% of net retail floorspace. The increase in the percentage of floorspace accounted for by convenience uses in 2018 was as a result of the opening of the new Morrison store.

4.3.5 Figure 4.6 illustrates the percentage of floorspace for each type of unit. When figure 4.3 is compared to figure 4.6, it is apparent that comparison goods outlets account for 42% of units in the CSA, however, they account for 45% of net retail floorspace. In contrast service outlets account for 45% of all units and only 29% of floorspace, which indicates that the majority of service use is smaller in scale than that of comparison usage.

Figure 4.6 Percentage of Floorspace by Retail Type



4.3.6 The floorspace taken up by convenience outlets varies between the market towns in the County. In Abergavenny, 17% of floorspace is taken up by convenience outlets. This compares to 20% in Monmouth and 24% in Chepstow. So whilst the opening of the Morrison's store has significantly increased the percentage of floorspace accounted for by convenience uses in the CSA of Abergavenny it still lags behind the other two market towns.

4.3.7 In addition to the retail and service uses, Abergavenny town centre contains a number of important non-retail uses including, the Council offices and Town Hall, a library, museum, tourist information centre and other tourist attractions. There is a police station, and doctor's surgery, churches and chapels, private sector offices and a significant number of residential dwellings both within and adjacent to the commercial centre.

4.3.8 Outside of the CSA, there are a number of small corner and petrol filling station shops providing a retail offer outside of the town centre. Furthermore, there are three other major retail developments; Waitrose at Llanfoist (2,325 m^2), Bailey's DIY on Brecon Road (814 m^2) and an edge of centre Aldi store (860m^2).

4.3.9 Outside of the immediate vicinity of the town centre, Neighbourhood Centres provide a retail offer of a local nature. Abergavenny has three such centres located at The Mardy, Hillcrest Road and Rother Avenue. These centres do not feature as part of this survey, however, the composition of each is as follows:

Hillcrest Road -	*Dobbins General Stores & Off Licence* *Bevan Family Butchers*
Rother Avenue -	*Londis, General Stores* *Frydays Fish Bar*
The Mardy -	*Postal Depot* *Mardy Traditional Fish & Chips*

4.4 Retailer Representation

4.4.1 Abergavenny is a relatively large market town and contains a number of national multiple retailers. In the comparison sector, national multiple retailers include B&M Bargains and Wilko in the variety and general household goods sector; Peacocks, Fat Face, bon marche, Clarkes and the Edinburgh Woollen Mill in the clothing sector; and Superdrug, Savers and Boots in the cosmetics sector. Other national retailers include Rymans, WH Smith and Waterstones (books/stationery), and Mountain Warehouse and Tresspass (outdoor equipment and clothing). In the convenience sector national retailers include a Morrison's, Tesco Metro, Aldi, and an Iceland. The CSA also features specialist convenience shopping, retailers like Holland & Barrett and Parsons Bakery represent such units and there are also two independent butchers. In addition, there are a considerable number of local comparison goods retailers.

4.4.2 A broad range of services can be found in Abergavenny, most national banks and major building societies are represented. Abergavenny also has a travel agent; Miles Morgan Travel and a number of estate agents. A large range of cafes, restaurants, pubs and bars are also available.

4.4.3 The number and proportion of national retailers in the Abergavenny CSA has fluctuated in recent years. After a high in 2017 where there were 50 national retailers representing 17.9% of retail units in the CSA, the most recent survey records a low of 44 national retailers, which represent 16% of retail units in the CSA. Figure 4.7 illustrates that the number of national retailers has fluctuated since 2010, but that there has been a net decline in this period after a high in 2017. Since the previous survey national retailers including Car Phone Warehouse, Boots Opticians and Coffee#1 have all closed. The trend in relatively recent years has been the growth in representation of chain cafes. Whilst Café Nero and Costa Coffee are still represented, Coffee#1 has now closed. However, there is a range of independent cafes in Abergavenny CSA as well. Figure 4.7 shows the number of national retailers operating within the Abergavenny CSA over the past few years.

Figure 4.7 Number of National Retailers within the CSA over Time

Year	**2010**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**
No. of Outlets	49	47	48	48	47	50	47	48	44

Note: figures do not include charity shops.

4.4.4 An analysis of the number of charity shops in Abergavenny reveals that there has been a significant increase in the past 15 years. In 2003 there were 5 charity shops in the CSA and the most recent survey recorded 12 accounting for 10.3% of comparison goods outlets. This is one less than the 2019 survey. All of the outlets are of a national nature.

4.5 Retailer Demand and Intentions to Change Representation

4.5.1 Historically retail development within Abergavenny has featured mainly small to medium scale development, however in recent years the main change has been the redevelopment of the site to the south of the CSA which is now an Aldi food store and the redevelopment of the cattle market site in Lion Street for Morrison's, which opened in March 2018. There is currently an application to extend the Aldi store on the A40 which is pending consideration. The most significant development before this was at Cibi Walk, a scheme opened in 1988 which provides 16 units and 4200m² of retail floor space. The popularity of this scheme is reflected in the number of national multiples involved including; The Works, Superdrug, WH Smith, Iceland and Wilko. In more recent times temporary kiosks have been established on the pedestrian access through the complex, reflecting the large number of people using this entrance to the town centre.

4.5.2 Other smaller developments have included Lewis's Walk, which consists of small retail units, providing approximately 400m2 of net floorspace of niche local retailing.

4.5.3 Information available on retailer demand and intentions to change representation is fairly limited. Despite closures, evidence over recent years suggests that there is no reluctance on the part of new retailers, including multiples, to be represented in the town centre, particularly within the primary shopping area. In recent years well known multiples such as The Edinburgh Woollen Mill and Waterstones Book Shop have located in the town, with a Pandora jewellery store also opening in more recent years. Whilst the newly established Morrison's on the Cattle market site represents further evidence of continued retailer confidence in the town.

4.6 Vacancies

The number of vacant units within a town centre is a useful barometer of the health of the town centre and how well it is trading. However, national planning policy advises that whilst vacancy rates are a useful guide for measuring vitality and viability, vacancies can arise in the strongest of centres

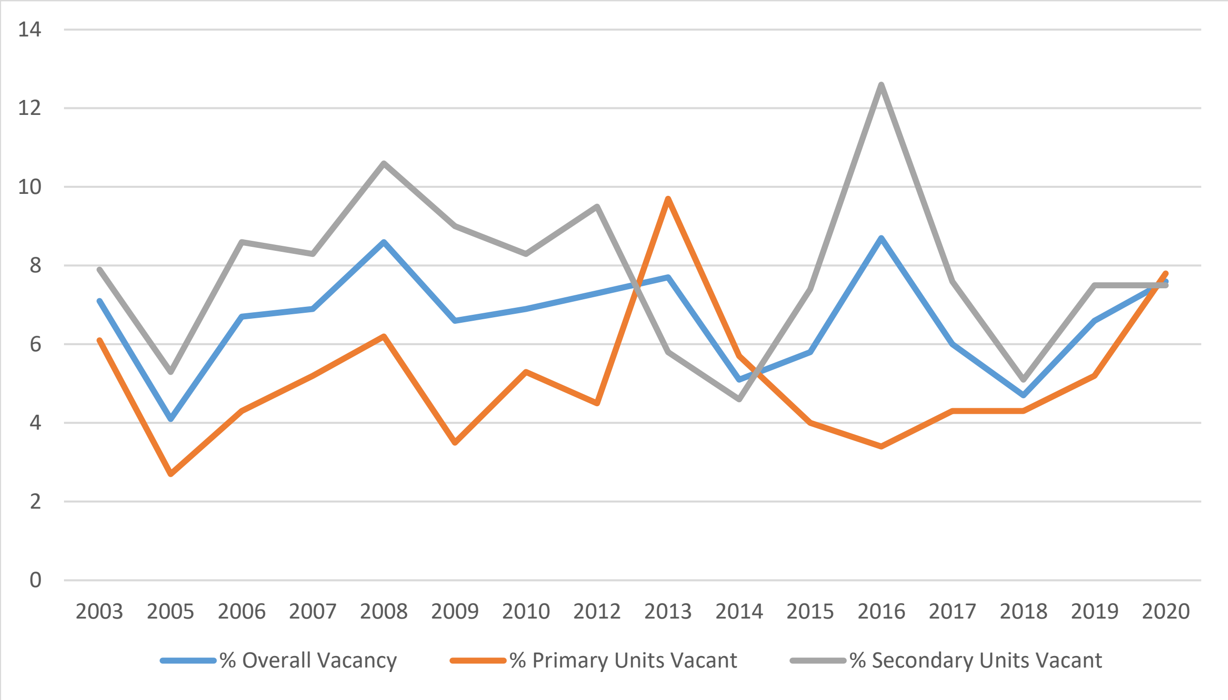
4.6.1 Figure 4.8 illustrates vacancy rates within the Abergavenny CSA over time.

Figure 4.8 Number of Vacant Units over Time within the CSA

	No. Vacant Units	% Overall Vacancy	% Primary Units Vacant	% Secondary Units Vacant
2003	17	7.1	6.1	7.9
2005	10	4.1	2.7	5.3
2006	17	6.7	4.3	8.6
2007	18	6.9	5.2	8.3
2008	22	8.6	6.2	10.6
2009	17	6.6	3.5	9
2010	18	6.9	5.3	8.3
2012	19	7.3	4.5	9.5
2013	21	7.7	9.7	5.8
2014	14	5.1	5.7	4.6
2015	16	5.8	4	7.4
2016	24	8.7	3.4	12.6
2017	17	6	4.3	7.6
2018	13	4.7	4.3	5.1
2019	18	6.6	5.2	7.5
2020	21	7.6	7.8	7.5

4.6.2 The 2020 retail survey records an increase of 1% and 3 units in the overall vacancy rate of Abergavenny town centre. After a high (8.7%) in 2016, the overall rate has gradually increased since 2018 with a sharp increase recorded in the previous survey. The overall vacancy rate (7.6%) is now at its highest since 2016. This may, in part reflect the impact of the pandemic on the high street. Vacancy within the Primary Shopping Frontage has increased by a significant 2.6%, whilst vacancies in the Secondary Shopping Frontage have remained the same.

Figure 4.9 Vacancy Rates over Time within the CSA



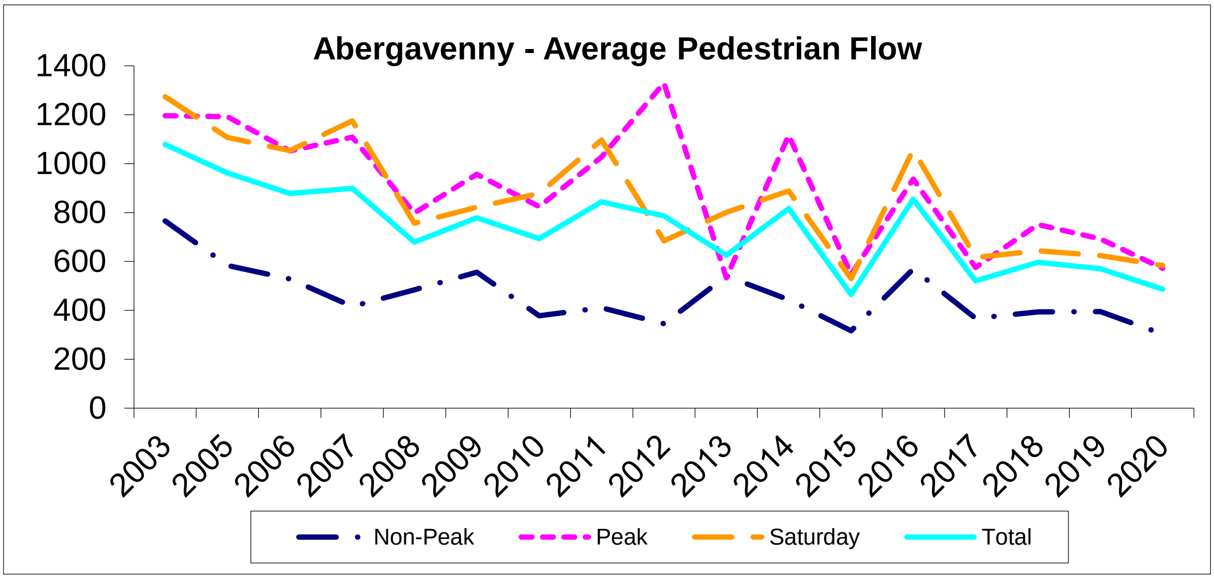
4.7 Pedestrian Flows

4.7.1 As part of the retail survey a pedestrian flow count is undertaken at several strategic points throughout the town centre, including; Lion Street, the Town Hall, Tesco Store (Frogmore Street), Cibi Walk (King Street end and Frogmore Street end), Lewis's Lane, Nevill Street, St. Johns Street, Flannel Street, High Street and Cross Street.

4.7.2 The graph below indicates that generally pedestrian flows have declined over the past 15 years within the Abergavenny CSA, with this decline evident at all three times when the survey is undertaken. The 2020 footfall survey is largely similar to the previous 2 surveys, however also records a minor decline across all average counts. This may reflect the impact that the Covid19 pandemic has had on the volume of pedestrians in the town.

4.7.3 The peak time for pedestrian movement within the CSA has become more sporadic over the previous couple of surveys and largely remains between 11am and 2pm, which coincides with lunch periods. However this was evidently less than in previous years and may be due to increased numbers working from home in 2020. There were larger counts on peak days between across all time periods at High Street (Cross Street End), this location also recorded the highest count on the non-peak day in 2020. The same location recorded the highest average count on Saturday whilst Cibi walk (Frogmore Street Entrance) also recorded a reasonably high count on the Saturday.

Figure 4.10 Average Pedestrian Flow Rates over Time



4.8 Accessibility

4.8.1 Accessibility is an important element of a viable, attractive and healthy town centre. There are many indicators of accessibility including, public transport, car parking and pedestrian and cycle networks.

4.8.2 The availability and cost of parking in a town centre can influence the modes of transport used and ultimately the business performance of the CSA. Abergavenny has several town centre car parks consisting of 1,309 spaces all managed by the Council, and all subject to charging. Of the available spaces 60 are disabled bays. There are also 5 electric vehicle charging points across two of the car parks. Observations would suggest that the car parks within the town centre are popular and well used. The newly established Morrison's also provides 233 spaces with 2 hours free parking in a fairly central location with pedestrian links to the centre of town.

4.8.3 Abergavenny is also an important public transport hub. Bus services from the bus station located on Monmouth Road serve the town itself as well as a wide catchment. There is also a railway station located approximately half a mile from the town centre, providing links to Manchester, Newport, Cardiff and Liverpool. However, the pedestrian links from the station to the town centre are poor.

4.8.4 Abergavenny town centre is relatively compact and therefore is suitable for pedestrians. Equally its topography and the pedestrianisation of High Street and Nevill Street, as well as Cibi Walk, makes for a safe and pleasant experience for shoppers. Recently installed pedestrian links around the Morrison's supermarket as well as the part pedestrianisation and public realm works of Frogmore street enhances the town centre. Despite this major advantage, Abergavenny's pedestrian links to its side streets could be improved and there remains a conflict between vehicular traffic and pedestrians in certain locations, most noticeably at Cross Street.

4.8.5 Cycle links with the town are good with the national cycle network passing through the town and the provision of cycle stands at St. John's Square and adjacent to the bus station.

4.9 Environmental Quality

4.9.1 The whole of Abergavenny's retail and commercial centre lies within a designated conservation area and retains a markedly 18th Century appearance upon a medieval road pattern with approximately 150 listed buildings. The town centre's environmental quality is generally high with limited evidence of litter and graffiti.

4.10 Household Survey

4.10.1 The Council have conducted a series of household surveys over the past 20 years looking at the shopping patterns of people living in our main towns. The first survey was undertaken in 1997, this was then repeated in 2006 and then again in 2009 as part of a larger Retail and Leisure Study which was undertaken as a background study for the Local Development Plan. The latest survey was conducted in November 2015.

4.10.2 For the latest survey a total of 1,005 telephone interviews were carried out within six identified zones based on the County's main retail centres and constructed to reflect the sphere of influence of each centre. A series of questions were asked in an attempt to establish the trade draw of the Counties central shopping areas. The key questions asked concerned the location of the households' main food shop, the location of any top-up convenience shopping and where local residents shop for a variety of comparison goods.

4.10.3 All of the household surveys which have been undertaken to feed into the Retail Background Paper follow a broadly similar methodology so that whilst they do not allow for an exact comparison they do give some indication, over time, of changing shopping habits.

4.10.4 Of all those people interviewed for the 2015 survey three quarters do their main food shopping once a week or more often, this rises to 82% for respondents from the Abergavenny catchment area.

Figure 4.11 Main Convenience Shopping Outlet

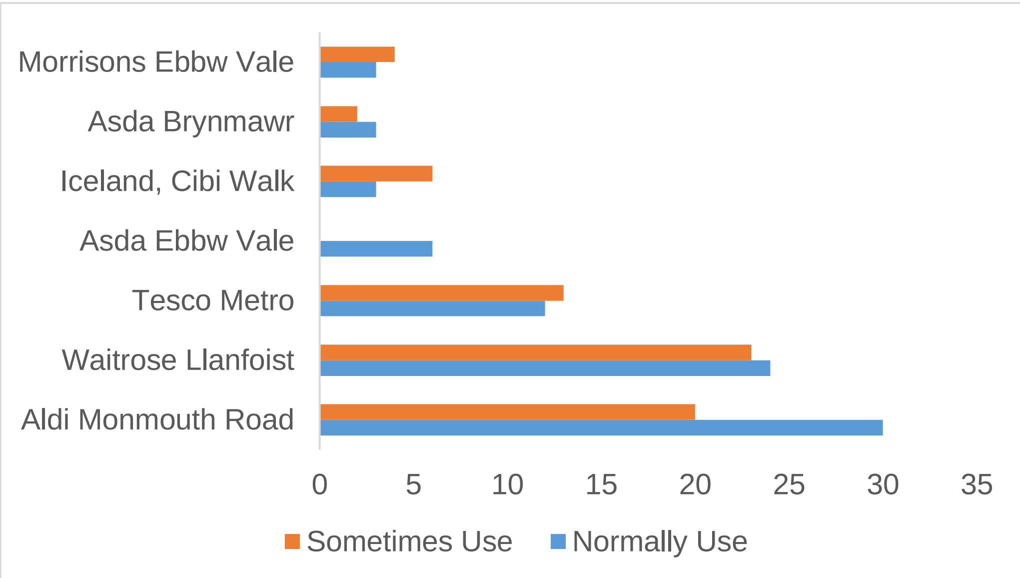
Outlet (%)	**1997**	**2006**	**2009**	**2015**
Safeway (town centre)	34	-	-	-
Tesco, Frogmore Street	26	36	28	12
Waitrose (Llanfoist) (Safeway – 1997)	18	18	27	24
Kwiksave (town centre)	3	-	-	-

Iceland (town centre)	-	2	3	3
Aldi, Monmouth Road	-	-	-	30
Other Local Shops	1	1	-	-
Total Abergavenny	82	58	58	69
Other Monmouthshire	3	2	2	1
Outside County	15	40	40	30
Cwmbran	6	10	4	6
Ebbw Vale	2	14	27	11
Newport	2	2	1	1
Hereford	3	4	4	2
Internet	-	-		5

4.10.5 Of those interviewed in the Abergavenny zone 69% said they do their main convenience shopping in Abergavenny, this is up on the levels recorded in the previous two surveys, although there are still a significant number of respondents who do their main food shop outside of the County. The most noticeable recent change is the high percentage of respondents (30%) who are undertaking their main food shop in the Aldi store on Monmouth Road. From the responses it would appear that it is drawing some trade away from the Tesco store but also from outside the County, in particular outlets in Ebbw Vale. The rise in the popularity of this type of store mirrors a national trend.

4.10.6 In terms of the stores that the respondents visited for their main food shop, it is noticeable from the chart below that the Aldi store on Monmouth Road (50%) and the Waitrose in Llanfoist (47%) have the largest share, with the Tesco Metro store on Frogmore Street with half this at 25%.

Figure 4.12 Stores Visited for Main Food Shop



4.10.7 Of those interviewed in the Abergavenny zone, 76% said they do their top-up convenience shopping within the town. Again, however, there is a significant, if declining, percentage lost out of County, although some of these trips will be linked to place of employment. The percentage of interviewees who do their top-up shop at local stores shows the continuing importance of neighbourhood centres. As a result of the new Morrison's supermarket development, it is expected that the number of those residents doing their shopping within the town will rise, whilst the percentage lost will decrease.

Figure 4.13 Top up Convenience Shopping Outlet

Outlet (%)	**1997**	**2006**	**2009**	**2015**
Local Shops / Other Abergavenny	31	11	16	12
Safeway (town centre)	19	-	-	-
Tesco	19	22	26	17
Waitrose (Llanfoist) (Safeway – 1997)	8	22	17	21
Kwiksave	5	-	-	-
Iceland	3	5	8	3
Aldi, Monmouth Road	-	-	-	21
Local Market	1	-	3	2
Total Abergavenny	86	60	70	76
Other Monmouthshire	7	3	3	4
Outside County	7	37	28	20
Cwmbran	2	7	1	1
Ebbw Vale	1	5	6	4
Newport	1	1	1	0
Hereford	2	1	2	1

4.10.8 The table below shows the percentage of those interviewed in the Abergavenny Zone regarding their preferred locations for buying a range of comparison goods. Of those shopping for these items outside of the County the other most popular destinations are shown. It can be seen from this that the trade draw away from the town is very dependent on the type of good. In comparison to the other three main towns in the County, however, Abergavenny maintains a higher share of the available trade across all of the comparison good sectors. For Abergavenny the main trade draws away from the town for comparison goods are Cwmbran and Cardiff.

Figure 4.14 Comparison Shopping

%	Abergavenny	Other Mon'shire	Internet	Outside County/Other
1st choice clothes, footwear and other fashion goods	16	1	12	71 1. Cwmbran - 31% 2. Cardiff – 16%
2nd choice clothes, footwear and other fashion goods	6	1	4	89 1. Cardiff – 22% 2. Cwmbran – 16%
Books, music, DVDs and toys	28	0	44	28 1. Cwmbran – 14%
Chemist goods, toiletries and cosmetics	69	1	4	26 1.Cwmbran – 6%
Furniture, carpets and soft furnishings	23	0	21	56 1. Cardiff – 18% 2. Cwmbran – 16%
Household goods, glass, china and tableware	34	0	11	55 1. Cardiff – 17% 2. Cwmbran – 14%
Electrical goods	14	0	31	55 1.Cwmbran – 28%
DIY, hardware and gardening goods	52	0	3	45 1. Cwmbran – 21% 2. Ebbw Vale – 7%
Banking, financial and legal services	67	0	19	14 1. Cwmbran – 4%

4.10.9 In some sectors it can be seen that significant numbers of respondents are shopping on-line, this is particularly noticeable for books, music, DVDs and toys, electrical goods and furniture, carpets and soft furnishings.

4.10.10 As well as looking at the retail offer of the main towns, the survey also asked respondents about their choice of location for various leisure activities. Of those in the Abergavenny catchment area who said they visited the cinema, 48% said they usually went to the Baker Street Cinema, with 26% using the Vue Cinema in Cwmbran and 10% the Vue Cinema in Merthyr Tydfil, showing that where there is a local cinema it is well used.

4.10.11 Respondents were also asked which gym or sports/leisure centre they usually used. 78% of those who use this type of facility said they used the Abergavenny Leisure centre, showing the importance of locally available facilities.

4.10.12 In terms of the respondents' use of museums, art galleries and theatres people tended to travel further afield for these when they used them. For those in the Abergavenny catchment area who normally visit such facilities, 54% would go to Cardiff to visit a museum, 48% would go to Cardiff to visit an art gallery and 45% would go to Cardiff for the theatre. Although the presence of a local theatre in the town means that 31% would visit the theatre in Abergavenny.

4.11 Town Centre Initiatives and Regeneration Programmes

4.11.1The need to strengthen Abergavenny as a shopping destination has been a key objective for the County Council and as such the cattle market site was identified as its preferred location for a supermarket. Planning permission for a 2,850m^2 Morrison's food store together with provision of 233 car parking spaces (including 15 parent & child spaces), 13 disabled spaces and 2 motor cycle spaces was approved. This store is now open and well established and seems to be trading well, with customers also using other town centre retail opportunities.

4.11.2 The need to provide links to the cattle market site was considered essential to enable linked trips across the town centre to shops and Abergavenny's various attractions. Accordingly, a pedestrian link from Fairfield car park to Market Street and the Town Centre has been provided. The improved pedestrian access on the Northern end of Frogmore Street has also contributed to the safety and accessibility of the Central Shopping Area.

4.11.3 In addition, the Brewery Yard project, which includes Market Street and sections of Lion Street has:

- Improved the setting for the town's regional markets and events – such as the Food Festival, and
- Provided an exemplar public space that can be used and enjoyed by everyone.

4.11.4 An impact assessment conducted in January 2014, part of an on-going evaluation of the success of the scheme, showed that 92% of visitors questioned, agreed that the project had enhanced this area of the town. Virtually all visitors (98%) agreed that the setting of the Bethany Chapel has improved with just over three quarters of visitors (76%) agreeing that the presentation of the Market Hall has improved. In addition, just over half of visitors (51%) said that the improvements have encouraged them to attend the markets in the Brewery Yard.

4.11.5 In addition to the above improvements to the public realm, money was committed by the Council ahead of the National Eisteddfod which came to the town in August 2016 for enhancements to the pedestrianised area of High Street and Nevill Street with St John`s Square to transform them into a pedestrian-friendly open space designed to host various events staged in the town. The programme of works was developed in close consultation with representatives from the community as well as County and Town Councillors. The works further enhance shoppers' experience of the town and can only impact positively on the viability and vitality of the centre.

4.12 Other Future Retail Development

4.12.1 At the time of writing this report there was an application for the extension of the Aldi store at the southern end of Cross Street and just off the A40. At the time of writing, the application had yet to be determined. There were no other proposed retail developments with either outline or full planning permission within the CSA of Abergavenny.

5 CALDICOT

5.1 Background

5.1.1 Caldicot is located to the south of the County and lies between the M4 and M48 and in relatively close proximity to the County border. Given the age of some of the settlements in the County, Caldicot can be seen as a relatively 'new town' having undergone substantial development since the 1960s. The town, has matured from a local centre and now provides its population of 9,600 (2011 Census), as well as a wider hinterland with an established retail facility. The town centre is a relatively modern development in comparison to its counterparts throughout the County, and is now undergoing a significant regeneration (See paragraph 5.11.5). A street market is held twice a week on a Tuesday and Saturday.

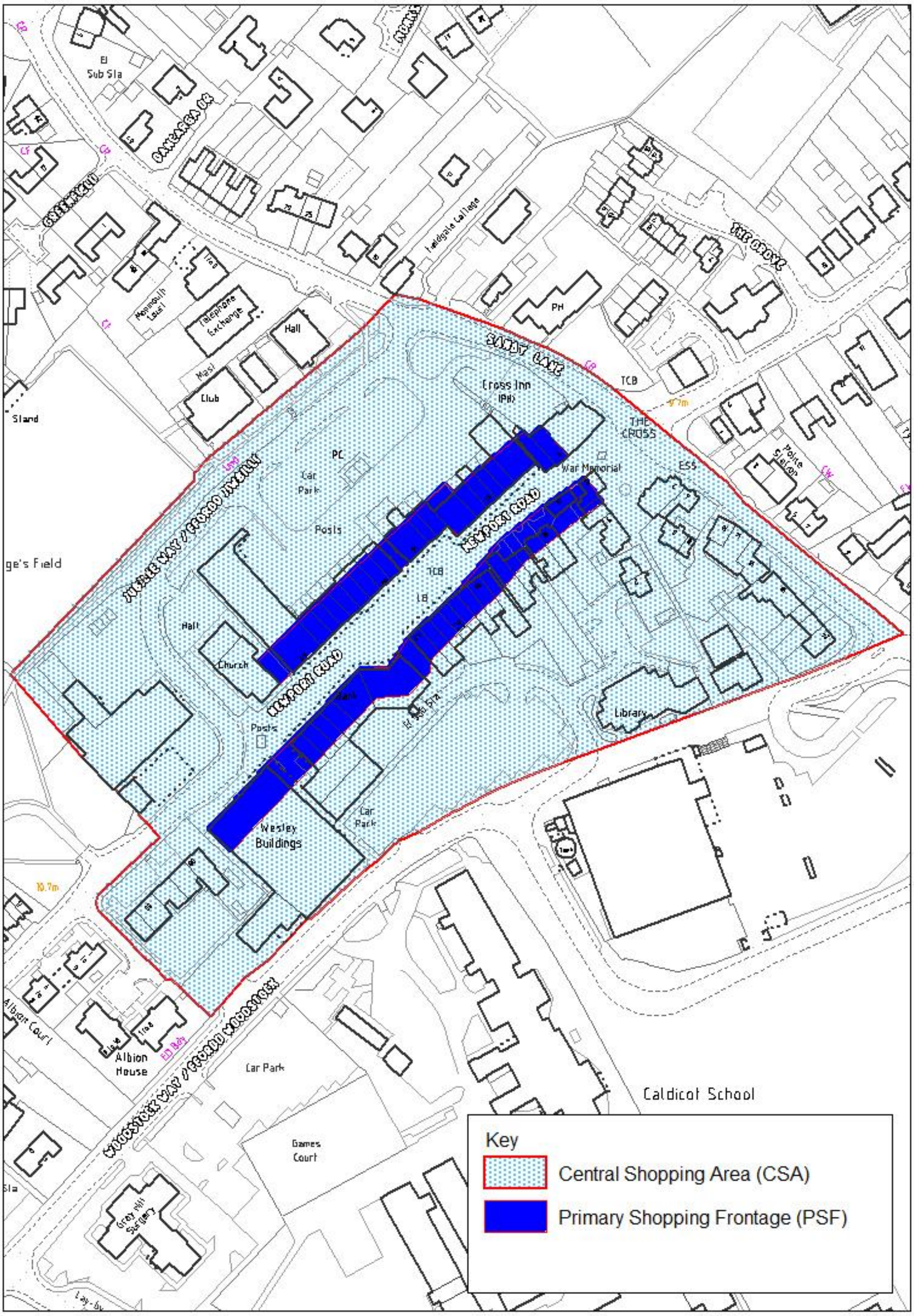
5.1.2 Policy RET2 of the Adopted Local Development Plan (LDP) has defined for planning purposes the retail core of the town centre as a Central Shopping Area (CSA). The CSA relates to the central area, which provides a broad range of facilities and services and fulfils a function as a focus for both the community and public transport. However, the CSA is not exclusive to shopping and retailing activities exist outside of this area.

5.1.3 In addition to the above the Adopted LDP also contains Policy RET1 - Primary Shopping Frontages (PSF) which specifically focuses on primary shopping frontages within the CSA and sets out the criteria for considering non-retail proposals within these frontages. The policy gives priority to retail (A1 uses) in the town centres' primary shopping frontages and seeks to protect the predominant shopping role and character of the main towns by controlling the loss of retail units within such frontages.

5.1.4 The Primary Shopping Frontages Supplementary Planning Guidance (SPG) was published in April 2016 and provides clarification for both applicants and the Council in the interpretation and implementation of policy RET1. The SPG assists decision making by setting out guidance on the criteria based approach for assessing proposals for non-retail use classes in the County's primary shopping frontages. In particular, this SPG clarifies the proportion of ground floor units in non-retail use that the Council considers acceptable within the specified frontages. The identified maximum thresholds for non-A1 uses in the County's primary shopping frontages are provided in Appendix D.

5.1.5 The area occupied by the CSA and PSF in Caldicot is shown in figure 5.1 below.

Figure 5.1 Caldicot Central Shopping Area (CSA) and Primary Shopping Frontage (PSF) (LDP)



5.2 Shopping Hinterland

5.2.1 The Caldicot shopping hinterland differs significantly from the large rural catchments that serve the principal market towns. The catchment serves an area extending from Rogiet in the west to Portskewett in the east and extends as far north as Llanvair Discoed (Appendix A). The 2011 census indicates a resident population of some 13,200 living within 5,500 private households within this area.

5.2.2 Using Paycheck data we are able to look at the profile of this resident population. The Paycheck dataset developed by CACI indexes annual household income from data available from the Census, and other market research including lifestyle surveys. Subsequently, it indicated that the mean income of households in the catchment area of Caldicot in 2020 was £42,691, relative to £45,193 for the county as a whole, and £36,234 for Wales. Out of the households in the Caldicot catchment area, 18% are below 50% of the median income for the UK, and 25% below 60%. This compares to 17% and 22% respectively for Monmouthshire, and 25% and 33% for Wales as a whole (Appendix B).

5.3 Diversity of Uses

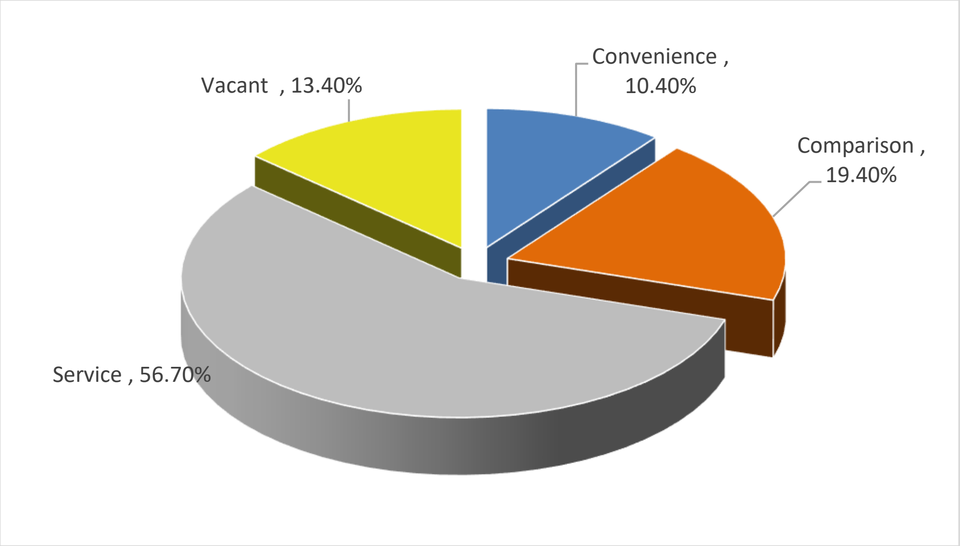
5.3.1 The most recent survey reflects an established trend of service outlets accounting for over half of all outlets in the CSA with a proportion of 56.7%. In contrast, comparison outlets, which account for 19.4% of all outlets, have seen a net decline over recent surveys. After an increase in the number of comparison outlets recorded in the previous survey, their number has decreased sharply in the most recent survey. Convenience outlets have a proportion of 10.4%, which reflects the presence of the ASDA superstore, not currently within the CSA.

Figure 5.2 Number of Outlets within the CSA by Use Type over Time

Year	Comparison No.	Outlets %	Convenience No.	Outlets %	Service No.	Outlets %
2002	26	37.1	8	11.4	32	45.7
2005	23	33.3	8	11.6	35	50.7
2006	24	34.8	7	10.1	36	52.2
2008	24	35.3	7	10.3	32	47.1
2010	25	37.3	6	9.0	33	49.3
2012	20	29.9	7	10.4	32	47.8
2013	19	27.5	7	10.1	36	52.2
2014	17	26.1	7	10.8	35	53.8
2015	17	25.7	7	10.6	35	56.1
2016	18	26.9	7	10.4	35	52.2
2017	16	24.2	6	9.1	38	57.6
2018	15	22.7	7	10.6	37	56.1
2019	17	25.4	7	10.4	38	56.7
2020	13	19.4	7	10.4	38	56.7

Note: Percentages include vacant units which are dealt with separately in section 5.6.

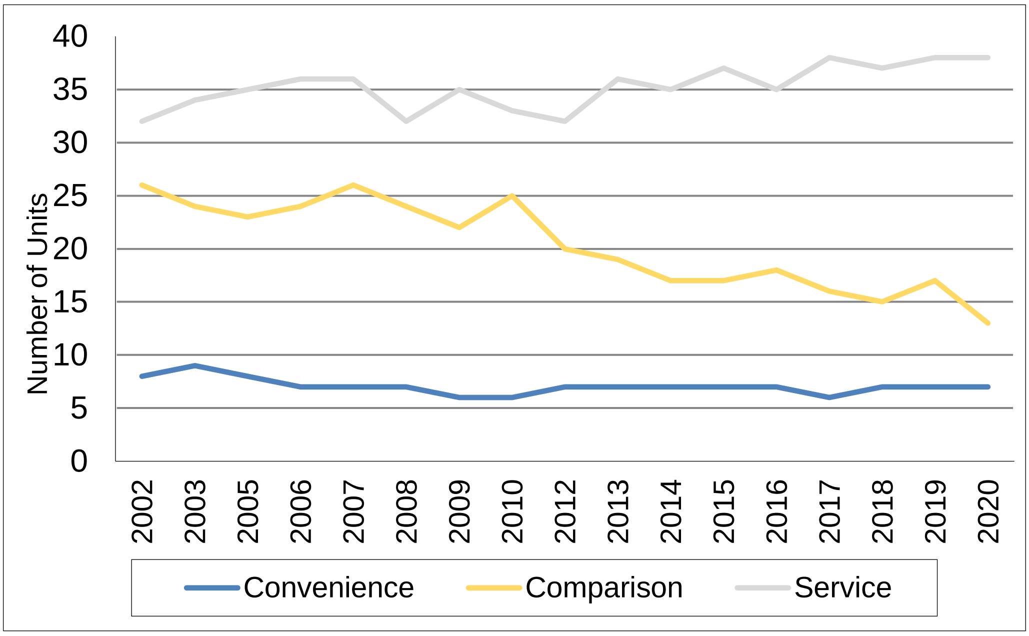
Figure 5.3 Percentage of Outlets by Use Type within the CSA



5.3.2 Figure 5.4 illustrates the retail usage within the CSA over time. It demonstrates that the gap between the number of service outlets and the number of convenience and comparison outlets has increased over time due to an increasing number of A3 units. The 2020 survey indicates that this trend is continuing and reflects that the number of comparison outlets has fallen sharply since the previous survey which emphasises the large difference between the number of service outlets and convenience and comparison outlets.

5.3.3 A point of note from the above in comparison with other towns in the County is the dominance of service outlets in the Caldicot CSA, which reflects the differing role it plays for its respective hinterland. However, Usk has seen a relatively large increase in its service proportion in 2020.

Figure 5.4 Comparison of the Number of Outlets within the CSA by Use Type over Time



5.3.4 Figure 5.5 demonstrates the diversity of retail uses within the CSA with regard to floorspace.

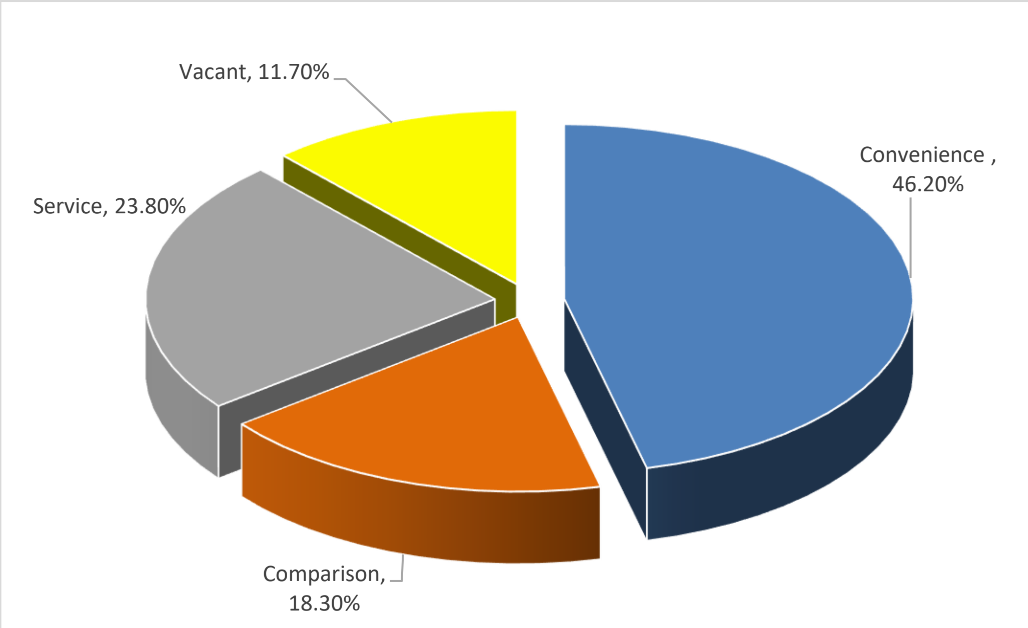
Figure 5.5 Percentage over Time of Floorspace Use within the CSA

Year	Comparison %	Convenience %	Service %
2002	45	29	24
2005	43	32	24
2006	45	25	28
2008	47	25	25
2010	48	24	25
2012	30	24	24
2013	41	24	28
2014	39	25	29
2015	28	47	22
2016	28	47	20
2017	25	46	25
2018	20	46	24
2019	21	46	24
2020	18	46	24

Note: Total and percentages figures include vacant units which are dealt with separately in section 5.6

5.3.5 Caldicot town centre as defined in the Adopted Local Development Plan has an estimated floorspace of approximately 10,000m^2 in 2020. The increase in the proportion of floorspace accounted for by convenience outlets since 2015 is largely due to the ASDA store (2900m2), which has undoubtedly contributed significantly to the convenience retail offer within the town centre. The dip in the percentage of floor space accounted for by the comparison sector in 2012 was due to the closure of Washbourne DIY. However, whilst this site has now been taken over by the Original Factory Shop, comparison share has continued to fall. The closure of 'Store Twenty-One' as noted in the 2018 survey has contributed to recent decline and this outlet remains vacant. Whilst service outlets account for nearly 57% of all units within the CSA, they account for less than a quarter of floorspace within the CSA, demonstrating that such uses occupy smaller units.

Figure 5.6 Percentage of Floorspace Use by Retail Type



5.3.6 In addition to the retail and service uses, Caldicot also contains a number of important non-retail uses both within, and adjacent to its town centre. Notable examples are the new Comprehensive School, the library, a doctor's surgery, and the job centre. Furthermore, religious and other community buildings, together with offices and residential properties also feature.

5.3.7 Outside of the CSA there are other retailers and several neighbourhood shops and services, notably along Newport Road. The estimated floorspace outside of the CSA is approximately 600m^2 of which service uses account for the largest proportion.

5.3.8 Outside of the town centre, Neighbourhood Centres provide a retail offer of a local nature. Caldicot has one such centre located at West End. The composition of the centre is: The Red Lantern (service); Chick o Land & Pizza (service); Co-op Foodstores (convenience) incorporating the Post Office;

Caldicot Barbers (service); and Weeks Fish and Chips (service).

5.4 Retailer Representation

5.4.1 Caldicot has a relatively small town centre and supports a range of national multiple retaillers, which account for over 13% of all CSA outlets. The convenience sector has the largest representation of national retailers with stores such as Waitrose and ASDA as well as Bargain Booze, McColls newsagent and Greggs Bakery. In the comparison sector, whilst the Original Factory Shop remains, Store Twenty One remains vacant.

5.4.2 A significant number of service outlets are also present, including several hairdressers and barbers, a national bank (Lloyds TSB), estate agents and several beauty salons also exist.

Figure 5.7 Number of National Retailers within the CSA over Time

Year	2006	2010	2012	2013	2014	2015	2016	2017	2018	2019	2020
Number of Outlets	8	7	6	7	7	9	10	10	9	9	9

5.4.3 The 2020 survey showed that 1 charity shop remains within the Caldicot CSA, which represents 1.5% of all CSA outlets.

5.5 Retailer Demand and Intentions to Change Representation

5.5.1 Current information on retailer demand and intentions to change representation in Caldicot is relatively limited, reflecting in part the size of the town centre. In more recent years' new national retailers have opened in the town but only to replace similar retailers, and there has been limited movement of retailers within the centre. The most significant development over the past few years has been the establishment of an ASDA supermarket on the edge of the town centre and the opening of The Original Factory Shop. At the time of writing the report, it is noted that Waitrose plan to vacate their premises but that an application for an Aldi in its place was pending consideration.

5.6 Vacancies

5.6.1 The number of vacant units within a town centre is a useful barometer of the health of the town centre and how well it is trading. However, national planning policy advises that whilst vacancy rates are a useful guide for measuring vitality and viability, vacancies can arise in the strongest of centres.

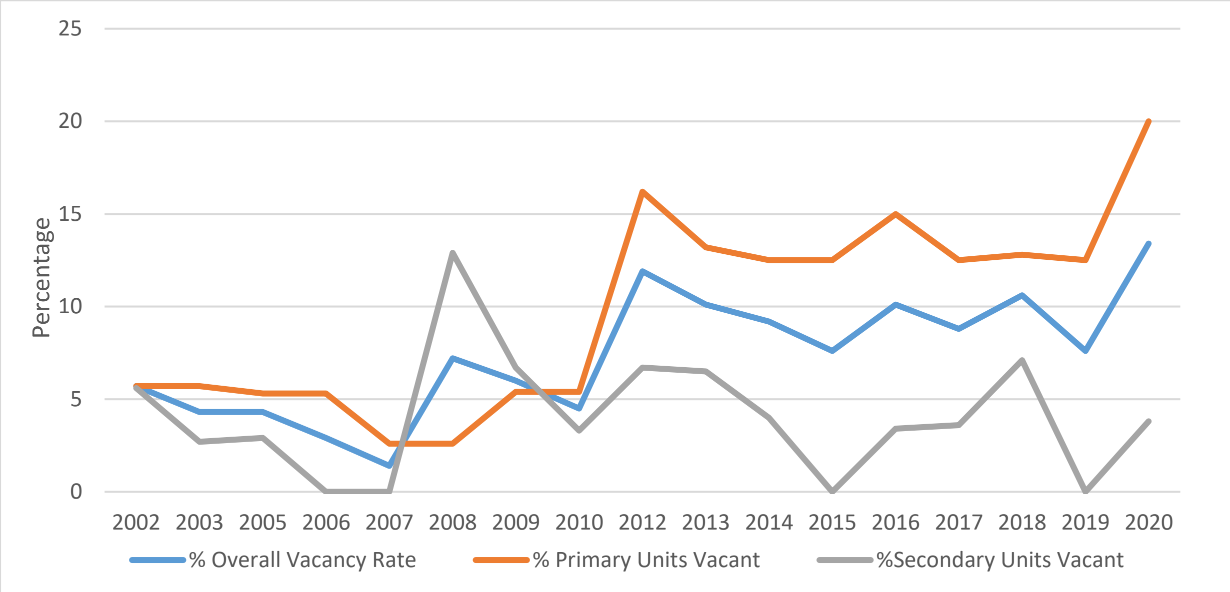
5.6.2 Figure 5.8 illustrates the current and past vacancy rates for the Caldicot CSA.

5.6.3 Caldicot town centre had a total of 9 vacant units at the time of the most recent survey, representing 13.4% of all outlets within the CSA. This is a sharp increase of 4 units and 5.8% respectively and is the highest overall vacanct rate on record. This may, in part reflect the impact of the pandemic on the high street. This fluctuation is also reflected in both primary and secondary frontage rates, where the vacancy rate in primary frontage units increased significantly to 20%, this reflects that eight of the nine vacant units are on primary shopping frontages. In secondary frontages, one unit was recorded as vacant, therefore recording a marginal increase on the previous survey, and representing 1.5% of all units within the secondary frontage.

Figure 5.8 Number of Vacant Units over Time within the CSA

Year	No. Vacant Units	% Overall Vacancy Rate	% Primary Units Vacant	% Secondary Units Vacant
2002	4	5.7	5.7	5.6
2003	3	4.3	5.7	2.7
2005	3	4.3	5.3	2.9
2006	2	2.9	5.3	0
2007	1	1.4	2.6	0
2008	5	7.2	2.6	12.9
2009	4	6	5.4	6.7
2010	3	4.5	5.4	3.3
2012	8	11.9	16.2	6.7
2013	7	10.1	13.2	6.5
2014	6	9.2	12.5	4
2015	5	7.6	12.5	0
2016	7	10.1	15	3.4
2017	6	8.8	12.5	3.6
2018	7	10.6	12.8	7.1
2019	5	7.6	12.5	0
2020	9	13.4	20	3.8

Figure 5.9 Vacancy Rates over Time within the CSA

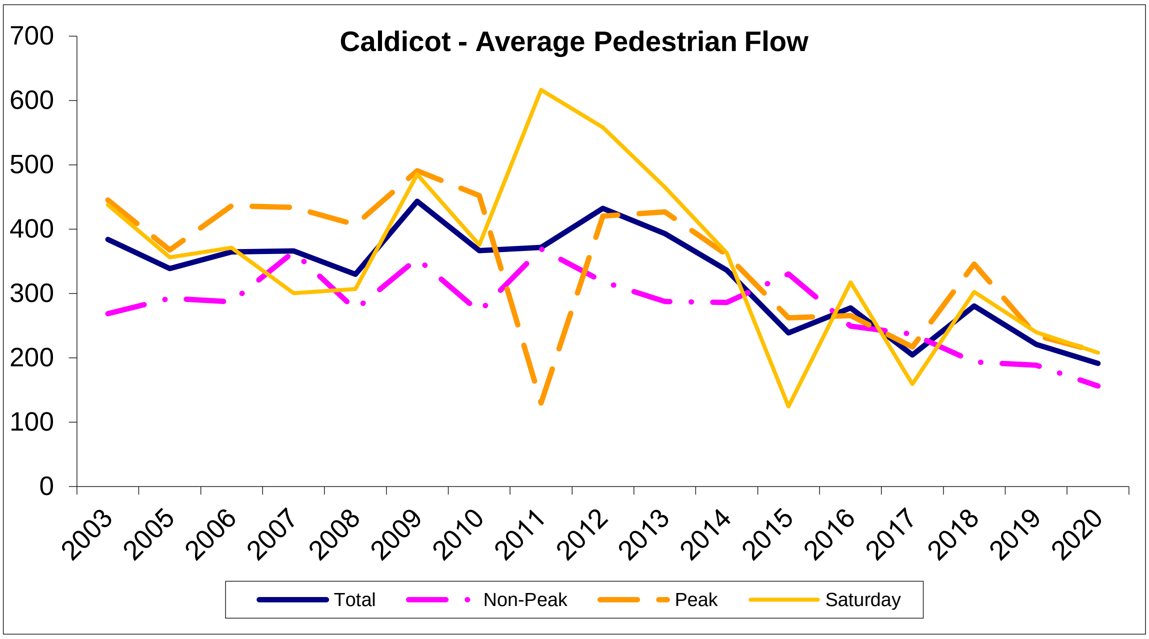


5.7 Pedestrian Flows

5.7.1 As part of the retail survey, a pedestrian flow count is conducted at strategic points throughout the town including; Newport Road (Gulf Garage), Newport Road (The Cross), Car Park Lane (Off License) and Waitrose.

5.7.2 The graph below shows the average pedestrian flow over time. Average pedestrian flow remained relatively stable up to 2012 where it started to decline considerably in 2013. The 2020 footfall survey continues the trend where all average flows have decreased and the overall average flow is the lowest on record. The decrease in footfall in 2020 may be influenced by the pandemic. Encouragingly, in more recent surveys whilst the average flows have decreased, the rate of decline has slowed. As expected, both the peak average flow and Saturday average flow are higher than the non-peak average flow.

Figure 5.10 Average Pedestrian Flow Rates over Time



5.7.3 Similar to previous surveys, peak times for pedestrians within the Caldicot CSA are between 11 and 1, coinciding, in part, with the lunch break. However this was less than in previous years and may be due to increased numbers working from home in 2020.The areas with highest pedestrian flows are outside Car Park Lane and Waitrose, both count points have sustained relatively high counts for several years. There has been a large decrease in the average pedestrian flow rate on a Saturday. In 2012 the average flow was just over 558, this declined to 363 in 2014, and then 318 in 2016. In 2017 the average flow fell again to 159. After a sharp increase in 2018 to 302, the average flow on a Saturday declined again in 2019 to 240 and the 2020 survey records an average footfall flow of 208 for Saturday. All settlements surveyed in 2020 saw a decline in overall average footfall flow.

5.8 Accessibility

5.8.1 Accessibility is an important element of an attractive, thriving and viable town centre. It has several indicators including car parking provision, public transport links, and pedestrian and cycle networks.

5.8.2 Business performance and modal split can be influenced by accessibility including the quantity and cost of parking provision. Caldicot town centre is well provided for in terms of car parks with a total of 159 spaces (including 14 disabled bays) in two locations both managed by the Council. These car parks also include 14 electric vehicle charging points between them. The relatively recently developed ASDA supermarket also provides further parking, however this is time limited. Car parking charges have not been introduced in Caldicot and from observations it appears that the car parks are popular and well used.

5.8.3 Caldicot, like Usk, does not have its own bus station, however, several bus services serving Chepstow, Newport and Bristol pass through the town. The train station is located approximately ¾ of a mile from the town centre. The station itself is reasonably well used and serves Gloucester and Cardiff, with park and ride provision to the Severn Tunnel Junction Station (London to Fishguard services) nearby.

5.8.4 Caldicot is the County's only modern centre where the full length of the town centre has been pedestrianised (200 metres), creating a safe and convenient experience for pedestrians and shoppers. The size and topography of the centre allows for convenient pedestrian movement. The town also acts as a nodal point for the footpath network. The ongoing regeneration work in the town centre will contribute to the safety and ease of access whilst also improving the aesthetics of the centre.

5.8.5 Cycle links within the town are good with a National Cycle Network passing through the town centre.

5.9 Environmental Quality

5.9.1 Caldicot's town centre is modern in appearance and the environmental quality is generally high, with limited evidence of litter and graffiti.

5.10 Household Survey

5.10.1 The Council have conducted a series of household surveys over the past 20 years looking at the shopping patterns of people living in our main towns. The first survey was undertaken in 1997, this was then repeated in 2006 and then again in 2009 as part of a larger Retail and Leisure Study which was undertaken as a background study for the Local Development Plan, the latest survey was conducted in November 2015.

5.10.2 In November 2015; 1,005 telephone interviews were carried out within six identified zones based on the County's main retail centres and constructed to reflect the sphere of influence of each centre. A series of questions were asked in an attempt to establish the trade draw of the County's central shopping areas. The key questions concerned; the location of the households' main food shop, the location of any top-up convenience shopping and where local residents shop for a variety of comparison goods.

5.10.3 All of the household surveys which have been undertaken to feed into the Retail Background Paper follow a broadly similar methodology so that whilst they do not allow for an exact comparison they do give some indication, over time, of changing shopping habits.

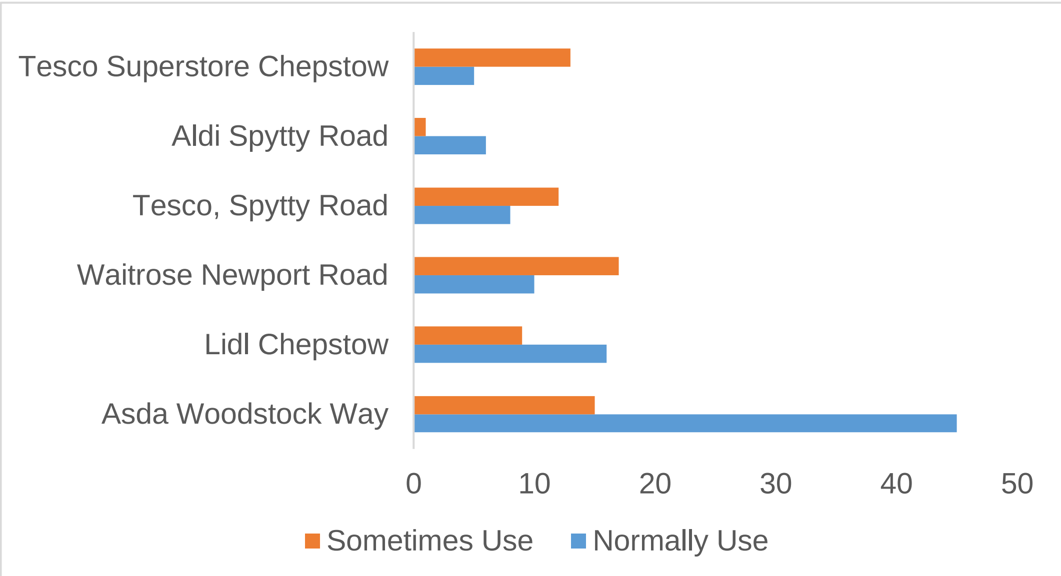
5.10.4 Of those interviewed in the Caldicot zone, 57% said that they do their main convenience shopping in Caldicot, a significant increase on the previous two surveys. The opening of the Asda store on Woodstock Way has appeared to have increased trade retention in the town with 45% of respondents saying they normally do their main food shop there. The main trade draw away from the town prior to the opening of the store was the Tesco store in Chepstow. Of those interviewed saying that they do their main food shop outside of the County, Newport is the main destination.

Figure 5.11 Main Convenience Shopping Outlet

Outlet (%)	1997	2006	2009	2015
Waitrose (Somerfield – 1997, 2006)	39	21	23	10
Co-op (West End)	-	-	2	2
Kwiksave	9	-	-	-
Asda (Woodstock Way)	-	-	-	45
Total Caldicot	48	21	25	57
Other Monmouthshire	14	61	43	23
Outside County	38	18	32	20

5.10.5 In terms of the stores that the respondents visited for their main food shop, it is noticeable from the chart below that respondents are visiting a wide variety of stores, although with 60% share in terms of all stores visited for main shopping, the Asda in Woodstock Way dominates.

Figure 5.12 Stores Visited for Main Food Shop



5.10.6 Of those interviewed in the Caldicot zone, 85% said they do their top-up convenience shopping within the town. However only 5% of these people did their top up shop at local stores, demonstrating the influence of the national retailers.

Figure 5.13 Top Up Convenience Shopping Outlet

Outlet (%)	1997	2006	2009	2015
Local Shops	16	3	18	5
Waitrose (Somerfield – 1997, 2006)	35	38	40	17
Co-op (West End)	-	2	19	20
Kwiksave	16	-	-	-
Asda Woodstock Way	-	-	-	43
Total Caldicot	67	43	77	85
Other Monmouthshire	18	48	13	12
Outside County	15	9	10	3

5.10.7 The table below shows the percentage of those interviewed in the Caldicot Zone regarding their preferred locations for buying a range of comparison goods. It can be seen from this that the trade draw away from the town is very dependent on the type of good. Caldicot's easy access to the motorway and its proximity to Newport mean that for certain goods there is a high trade draw away from the town. The main trade draw is the Spytty Retail Park at Newport although Bristol Cribbs Causeway and Cardiff are also drawing trade away from the town.

Figure 5.14 Comparison Shopping

%	Caldicot	Other Mon'shire	Internet	Outside County/Other
1st choice clothes, footwear and other fashion goods	3	2	4	91 1. Newport, Spytty Retail Park - 62% 2. Cardiff – 11%
2nd choice clothes, footwear and other fashion goods	1	9	7	83 1. Bristol, Cribbs Causeway – 22% 2. Cardiff – 17%
Books, music, DVDs and toys	10	3	50	37 1. Newport, Spytty Retail Park – 20%
Chemist goods,	47	8	1	44

%	Caldicot	Other Mon’shire	Internet	Outside County/Other
toiletries and cosmetics				1.Newport, Spytty Retail Park – 28%
Furniture, carpets and soft furnishings	3	5	27	65 1. Newport, Spytty Retail Park – 16% 2. Bristol Cribbs Causeway – 13%
Household goods, glass, china and tableware	9	4	21	66 1. Newport, Spytty Retail Park – 24% 2. Newport – 12%
Electrical goods	1	1	42	56 1.Newport, Spytty Retail Park – 28% 2. Bristol Cribbs Causeway – 9%
DIY, hardware and gardening goods	3	33	28	36 1. Newport, Spytty Retail Park – 13% 2. Newport – 13%
Banking, financial and legal services	47	7	37	9 1. Newport – 5%

5.10.8 In some sectors, significant numbers of respondents are shopping on-line, this is particularly noticeable for books, music, DVDs and toys, electrical goods and banking and financial services.

5.10.9 As well as looking at the retail offer of the main towns, the survey also asked respondents about their choice of location for various leisure activities. Of those in the Caldicot catchment area who said they visited the cinema, 69% said they usually went to the Cineworld at the Newport Retail Park, with a further 25% using the Riverfront in Newport.

5.10.10 Respondents were also asked which gym or sports/leisure centre they usually used. 78% of those who use this type of facility said they used Caldicot Leisure centre, showing the importance of locally available facilities.

5.10.11 In terms of the respondents use of museums, art galleries and theatres people tended to travel further afield for these when they used them. For those in the Caldicot catchment area who normally visit these, 63% would go to Cardiff to visit a museum, 39% would go to Cardiff to visit an art gallery and 39% would go to Cardiff for the theatre, although the presence of a more local theatre in Newport means that 11% would visit the theatre there.

5.11 Town Centre Initiatives and Regeneration Programmes

5.11.1 Caldicot town centre has experienced difficulties in the past with the closure of the town centre Kwik Save and the opening of supermarkets in Chepstow and Newport which have to be set against the steady growth of housing and population within the Severnside area. The existing Waitrose store was the sole supermarket for the town centre, with local residents seeking more choice and a better range of food shopping in Caldicot and the adjoining settlements.

5.11.2 Monmouthshire County Council responded to the needs of the local community and ear-marked a portion of land on the Caldicot Comprehensive School site, neighbouring the town centre for a proposed second supermarket. As part of the outline planning application submitted in December 2005 a retail impact assessment was provided, and this was updated prior to the grant of outline permission in 2012.

5.11.3 On the 20 February 2014 Asda Stores Ltd were granted full planning permission on the site for the development of a store with a net sales area of 2,900m^2, together with permission for 212 car parking spaces. To ensure that the town centre benefits from the store's activity the proposed layout located the store so as to maximise the potential for linked trips to the town centre and included the closure of Woodstock Way to traffic, which is made possible by a new relief road around the south of the site. This enables the creation of a large area of uninterrupted public realm and promotes pedestrian movement between the store and the primary shopping area, thereby enhancing the potential for linked trips.

5.11.4 The store is now well established and consumer surveys show that the store appears to be trading well. Any impact both positive and negative on the vitality and viability of the centre will be monitored through the annual retail surveys.

5.11.5 Monmouthshire County Council is in the process of a 'Caldicot Town Centre Regeneration', involving regeneration work on the Cross, Caldicot Enterprise Hub, a Retail Parade refurbishment, and the Jubilee Way Urban Living/Courtyard Scheme. Caldicot Town was chosen as Monmouthshire's priority Regeneration Scheme and forms part of the Cardiff Capital Region (CCR) Regeneration Plan. Work on the area of 'the Cross' is now underway. The projects above are a holistic and integrated approach to ensure that local residents, local enterprise and other key stakeholders mutually benefit. The projects aim to enhance accessibility to the town centre and its facilities, attract footfall and activity, provide spaces for joint working and other enterprise and to update the aesthetics and street scene around the retail core of Newport Road. This will all contribute to the health, vitality and attractiveness of Caldicot town centre.

5.12 Future Retail Development

5.12.1 At the time of writing this report there are no proposed retail developments with either outline or full planning permission within the CSA of Caldicot. It is noted that Waitrose plan to vacate their premises within the town and that an application for Aldi in its place in pending consideration.

6 CHEPSTOW

6.1 Background

6.1.1 Chepstow is located on the south-eastern boundary of the County and the border of South Wales with the South West of England, adjacent to the Severn Estuary. The town is positioned as the gateway to the County, adjacent to the M48 and original Severn Bridge Crossing. The population of Chepstow is approximately 12,400 (2011 Census) and rises to approximately 16,200 when the neighbouring Tutshill and Sedbury areas are included.

6.1.2 As a key tourist attraction in its own right, the walled town of Chepstow features a medieval street pattern, with the town serving a largely rural hinterland including areas to the east outside of the County. Among other events, a high street market is held twice a month.

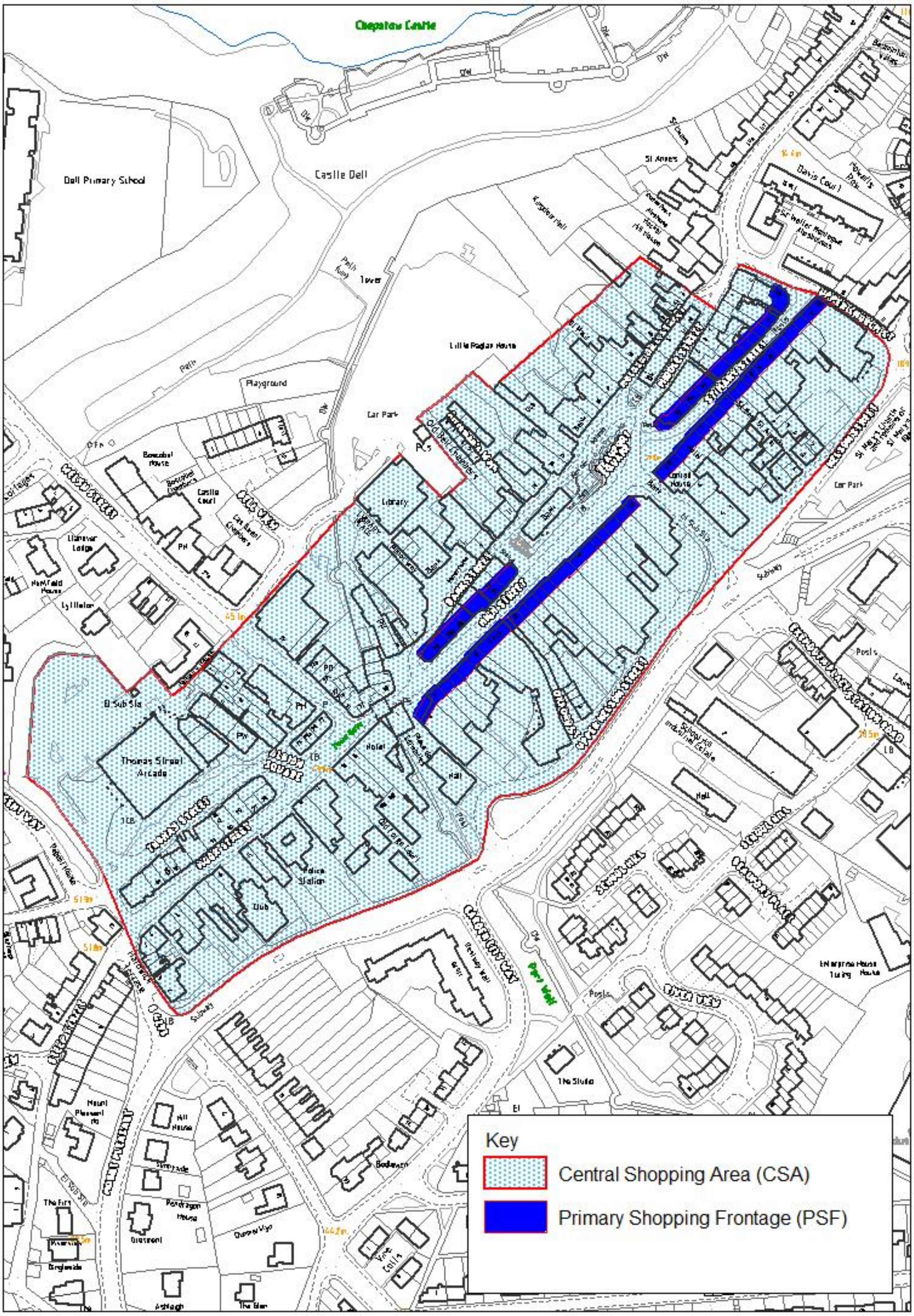
6.1.3 6.1.3 Policy RET2 of the Adopted Local Development Plan (LDP) has defined for planning purposes the retail core of the town centre as a Central Shopping Area (CSA). The CSA relates to the central area, which provides a broad range of facilities and services and fulfils a function as a focus for both the community and public transport. The CSA, however, is not exclusive to shopping and retailing activities exist outside of this area.

6.1.4 The Adopted LDP also contains Policy RET1 – Primary Shopping Frontages (PSF). This policy focuses on primary shopping frontages within each CSA and sets out the criteria for considering non-retail proposals within these frontages. The policy gives priority to retail (A1 uses) in the town centres' primary shopping frontages and seeks to protect the predominant shopping role and character of the main towns by controlling the loss of retail units within such frontages.

6.1.5 The Primary Shopping Frontages Supplementary Planning Guidance (SPG), published in April 2016, provides clarification for both applicants and the Council in the interpretation and implementation of Policy RET1. The SPG assists decision making by setting out guidance on the criteria based approach for assessing proposals for non-retail use classes in the County's primary shopping frontages. In particular, this SPG clarifies the proportion of ground floor units in non-retail use that the Council considers acceptable within the specified frontages. The identified maximum thresholds for non-A1 uses in the County's primary shopping frontages are provided in Appendix D.

6.1.6 The area occupied by the CSA and PSF in Chepstow is shown in figure 6.1 below.

Figure 6.1 Chepstow Central Shopping Area (CSA) and Primary Shopping Frontages (PSF) (LDP)



6.2 Shopping Hinterland

6.2.1 The Chepstow shopping catchment area covers a largely rural hinterland including Shirenewton, Mynydd-Bach and Devauden in the west and Woolaston in the north east. Llandogo forms the northern boundary and Mathern the boundary to the south (Appendix A). The 2011 census indicates a resident population of some 24,000 living within 9,800 private households within this area.

6.2.2 Using Paycheck data we are able to look at the profile of this resident population. The Paycheck dataset developed by CACI indexes annual household income from data available from the Census, and other market research including lifestyle surveys. Subsequently, it indicated that the mean income of households in the catchment area of Chepstow in 2020 was £47,723, relative to £45,193 for the county as a whole, and £36,234 for Wales. Out of the households in the Chepstow catchment area, 15% are below 50% of the median income for the UK, and 20% below 60%. This compares to 17% and 22% respectively for Monmouthshire, and 25% and 33% for Wales as a whole (Appendix B).

6.3 Diversity of Uses

6.3.1 Similarly to previous surveys, the 2020 survey indicated that the majority of outlets within the Chepstow CSA are service outlets which account for 45.9% of outlets. The number of comparison outlets has gradually decreased since 2016 and after a relatively sharp decline recorded in 2019, they now represent 34.7% of outlets within the CSA. However, they have consistently recorded a larger proportion than convenience outlets, which represented 5.9% at the time of the most recent survey. The majority proportion of service outlets with the Chepstow CSA is a reflection of the wide range of professional and financial services as well as restaurants, pubs and cafes associated with the centre.

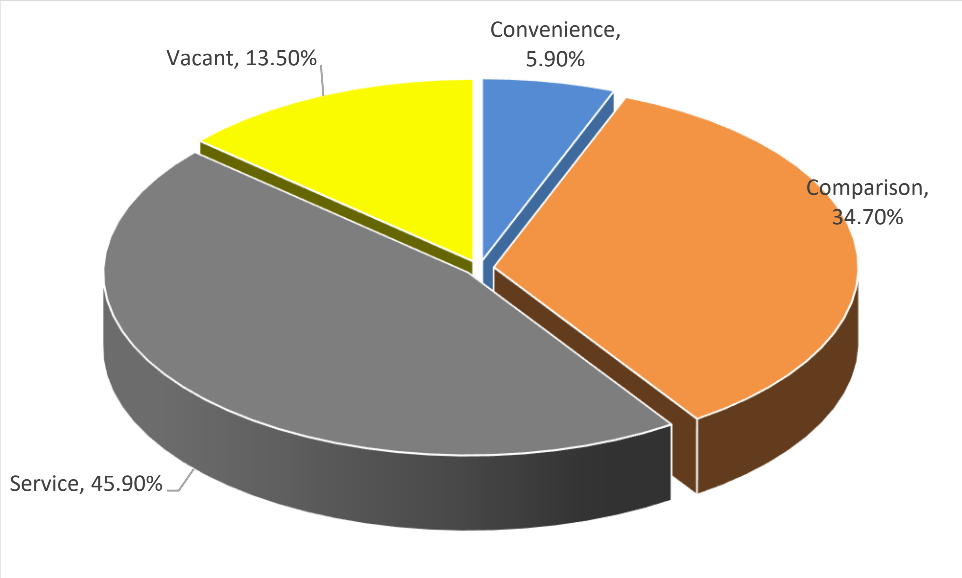
Figure 6.2 Number of Outlets within the CSA by Use Type over Time

Year	Comparison No.	Outlets %	Convenience No.	Outlets %	Service No.	Outlets %
2002	70	40.2	10	5.7	67	38.5
2005	73	41.7	10	5.7	75	42.9
2006	70	42.4	9	5.5	72	43.6
2007	69	41.8	9	5.5	73	44.2
2008	65	39.6	8	4.9	70	42.7
2010	64	38.1	6	3.6	79	47.0
2012	61	35.9	7	4.1	81	47.6
2013	62	35.4	7	4.0	85	48.6
2014	65	38.2	8	4.7	82	48.2
2015	64	37.6	5	2.9	84	49.4
2016	68	40.0	9	5.3	81	47.6
2017	67	39.6	12	7.1	80	47.3
2018	66	38.8	8	4.7	76	44.7

2019	61	35.9	10	5.9	80	47.1
2020	59	34.7	10	5.9	78	45.9

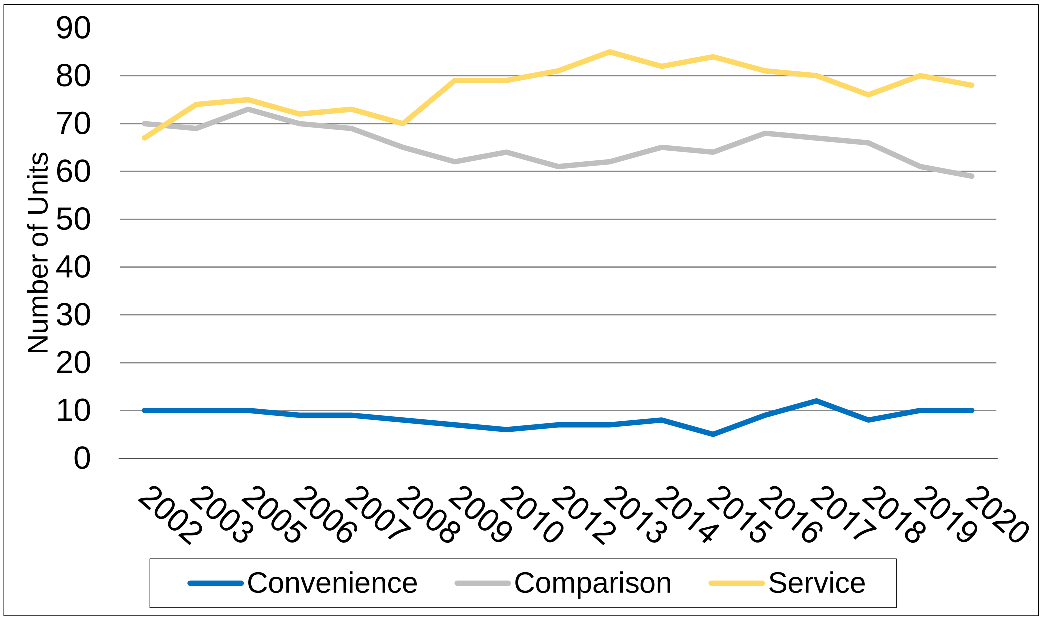
Note: Percentages include vacant units that are dealt with separately in section 6.6

Figure 6.3 Percentage of Outlets by Use Type within the CSA



6.3.2 A comparison of surveys over time reveals that the convenience sector has seen a lot of fluctuation ranging from 5.7% of all units in the CSA in 2005, to 2.9% in 2015. This decline was in part due to the closure of the Co-operative store in the town centre, however the opening of a Marks & Spencer Food Hall and Café saw this rise in the period since.. Over the same period, comparison outlets have seen a decline in both number and proportion from a high of 73 units (41.7%) in 2005, to a low of 59 units (34.7%) as per the 2020 survey. Of the three market towns in the County, Chepstow has the lowest percentage representation of comparison units in the CSA. The most significant change since 2002, has been the increasing proportion of service units in the CSA, 38.5% in 2002, against 49.4% at the time of the 2015 survey. The 2020 survey indicates a slight decline in this sector since the previous survey and the high in 2015, however, service uses still account for the largest proportion of outlets within the CSA.

Figure 6.4 Comparison of the Number of Outlets within the CSA by Use Type over Time



6.3.3 Figure 6.5 illustrates the diversity of use in the CSA in floorspace terms.

Figure 6.5 Percentage over Time of Floorspace Use within the CSA

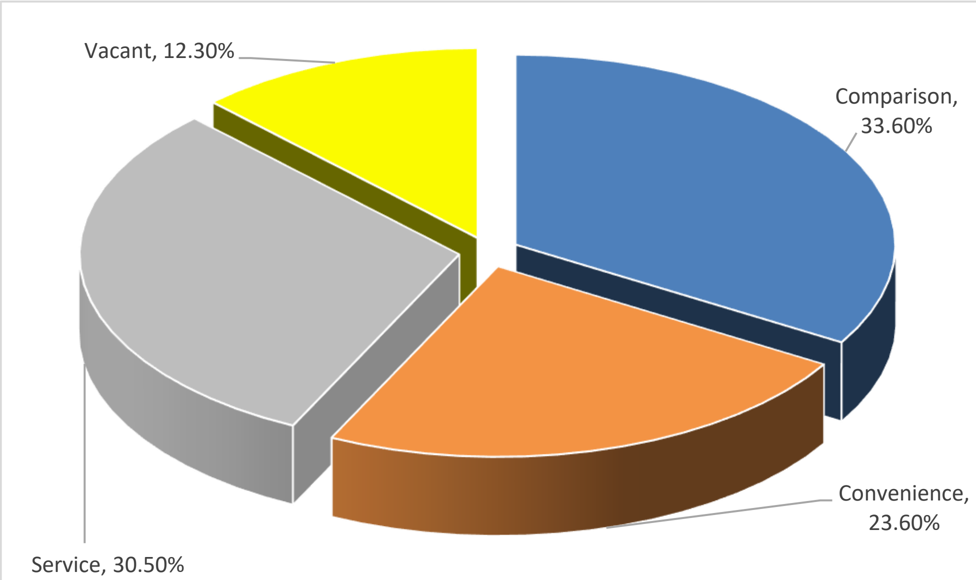
Year	Comparison %	Convenience %	Service %
2002	40	25	22
2005	45	24	24
2006	41	26	27
2008	40	28	25
2010	40	27	27
2012	38	27	29
2013	38	27	28
2014	41	24	31
2015	40	18	31
2016	42	24	30
2017	42	26	29
2018	37	24	28
2019	36	24	31
2020	34	24	31

Note: Total and percentage figures include vacant units which are dealt with separately in section 6.6

6.3.4 Chepstow town centre has an estimated net retail floorspace of just over 18,200m^2 in 2020, of which 34% is accounted for by comparison goods outlets. Convenience goods floorspace accounts for 24% and service goods 31%. The percentage of floor space accounted for by convenience goods is influenced by the inclusion of the edge of centre Tesco store which has a floor space of nearly 3000m2.

6.3.5 A comparison of more recent surveys reveals that the space accounted for by both comparison and convenience uses has declined over time. The 2020 survey records the lowest figure for comparison outlets (34%) and reflects a decline trend seen in other Market towns. Both comparison and convenience floorspace have seen a net decline since 2002 by 6% and 1% respectively, however, service floorspace has seen a net increase of 9%.

Figure 6.6 Percentage of Floorspace Use by Retail Type



6.3.6 A comparison of figure 6.3 and 6.6 reveals that whilst service outlets account for nearly 46% of outlets within the CSA, they only account for 31% of the floorspace, indicating that these units are relatively small in scale.

6.3.7 In addition to the retail and service uses, Chepstow town centre contains a number of important non-retail uses including, Council offices, a library, museum, tourist information centre and other tourist attractions. There is a police station, a doctors surgery, churches and chapels, private sector offices and a significant number of residential dwellings both within and adjacent to the commercial centre.

6.3.8 Outside the CSA, there are a number of small corner and petrol filling station shops. In addition to these units there are other significant edge/ out-of-town retail developments; including Tesco at Station Road, which as an edge of centre development is included in the figures above, and a Spar (300m^2) on the former Racecourse Garage site.

6.3.9 Neighbourhood Centres also exist, providing a retail offer of a local nature. Chepstow has two such centres located at Thornwell and Bulwark. In the Bulwark centre, which is the largest of the County's neighbourhood centres with over 3,000m^2 of available retail floorspace, there are a number of outlets including Lidl, a newsagent together with a post office, a pharmacy, an off-licence, a number of takeaway outlets, two charity shops and several hairdressers. Both Lidl and the bank of shops to the east of the Bulwark Road have been redeveloped in recent years improving the overall environmental quality of the centre. In the Thornwell centre there is a fish and chip shop together with a Tesco Express, which opened in June 2004 (over 3,000m² gross) and a B&M Bargains store, which opened in 2019.

6.4 Retailer Representation

6.4.1 Considering its status as a market town, Chepstow has a limited number of national multiple retailers, in comparison to Abergavenny and Monmouth. The proportion of national retailers within the CSA was 12.4% at the time of the most recent survey, which is lower than Abergavenny (16%), Monmouth (17%), and Caldicot (13%).

6.4.2 National retailers in the convenience goods sector are represented by a Marks and Spencer Foodhall and a Tesco located on Station Road. In addition, a Greggs bakery also features within the CSA. Chepstow also has a number of national retailers selling comparison goods, currently represented by The Original Factory Shop, Card Factory, Peacocks, Select, Wilko, WH Smith, Boots, Superdrug and Specsavers.

Figure 6.7 Number of National Retailers within the CSA over Time

Year	Number of Outlets
2006	21
2010	21
2013	23
2014	22
2015	21
2016	22
2017	22
2018	21
2019	20
2020	21

Note: figures do not include charity shops.

6.4.3 The independent comparison outlets in Chepstow are represented by a large number of smaller outlets run as local family businesses. Independent convenience outlets within the CSA include a butcher and European mini market.

6.4.4 There are a number of service outlets in Chepstow, financial services and estate agents are represented, though many service retailers depend on the tourist sector which will have been impacted by the pandemic. A high proportion of café / tearooms and similar service retailers can be found in the town. As with the other two market towns Chepstow has seen a growth in the representation of chain cafes, with both Coffee @1 and Costa opening outlets in the CSA.

6.4.5 In Chepstow the number of charity shops has remained relatively static for a number of years, however, the 2020 survey shows that there are 4 charity outlets all of a national nature. Charity shops represent 2.4% of the outlets within the CSA in 2020, which is lower than the other County towns.

6.5 Retailer Demand and Intentions to Change Representation

6.5.1 The most significant change in the CSA in the recent past has been the closure of the Herbert Lewis Department Store which represents a relatively large comparison unit in the centre of the CSA. Additional outlets in close proximity including All About Eve, Bidmead Cook estate agents and The £1 Company have also recently shut, however the 2020 survey picked up that Card Factory had moved into the unit previously occupied by The £1 Company . Before this, the closure of the Co-operative store where there has been a supermarket since the development of the Thomas Street Arcade, was the largest change. However, this site is now occupied by another convenience outlet in the form of a Marks and Spencer Food Hall and Café, meaning that there is still a national food retailer within the CSA.

6.5.2 Prior to this, the most significant retail investment in Chepstow was the opening of an edge of centre Tesco superstore located a few hundred metres walking distance from the town centre. In addition, a large site in Welsh Street was redeveloped in 2004 with Wilko taking over the former Kwik Save store thus increasing the retail profile of this part of the CSA.

6.5.3 Other significant changes and developments have included that of St. Mary’s Arcade which houses several local independent units ranging in size. It has featured relatively high levels of vacancy in the past however at the time of the most recent survey was fully occupied with the exception of 1 unit. This perhaps reflects its popularity within the town and its location as a link between the town centre and the Tesco store. Another development, the Bank Street Development, perhaps has a higher popularity than St. Mary’s Arcade as it is ideally located next to the main car park and town library, offering a range of units. However, unlike previous surveys which recorded that units that had previously been vacant were occupied, there is now one vacant unit at the development, however this may reflect the impact of the pandemic on retail centres.

6.5.3 As with the other towns, information on retailer demand and intentions to change representation is relatively limited. Much like Monmouth, Chepstow has seen several independent retailers relocate in and around the town for the most part from secondary to primary locations. The early 2000s saw several national retailers including Curry’s, Victoria Wine Off-Licence and Milwards close. However, other national retailers such as Specsavers and WH Smith soon located within the town, ensuring continued representation of national retailers in the town centre. During 2006 there was also development along the north side of the High Street with Bet Fred and All About Eve the bridal shop taking two of the units with the remaining larger unit let to Select Clothes. Similarly to the previous survey the vacancy rate on High Street remains relatively high at 14.8%. This is due to the relatively recent closures of All about Eve and Bidmead Cook Estate Agents whilst the Herbert Lewis store remains vacant. The 2020 survey noted that a vacant unit (The £1 Company) in the previous survey had now become occupied; however, a smaller unit further up High Street was newly vacant.

6.6 Vacancies

6.6.1 The number of vacant units within a town centre is often considered a useful barometer of town centre health and how a town is trading. However, national planning policy advises that whilst vacancy rates are a useful guide for measuring vitality and viability, vacancies can arise in the strongest of centres.

6.6.2 Figure 6.8 illustrates the current and past vacancy rates for the Chepstow CSA.

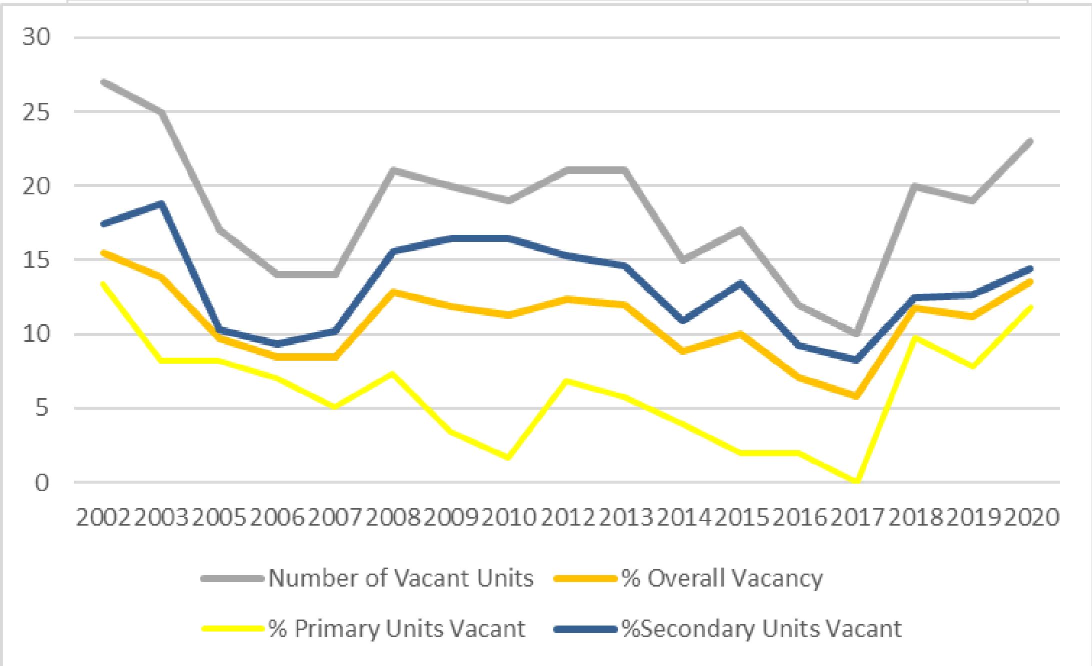
6.6.3 The 2020 survey recorded a sharp increase in the number of vacant units and overall vacancy rate by 4 and 2.3% respectively. Overall vacancy (13.5%) is now at its highest since 2003. This may, in part reflect the impact of the pandemic on the high street

Figure 6.8 Number of Vacant Units over Time within the CSA

Year	Number of Vacant Units	% Overall Vacancy	% Primary Units Vacant	%Secondary Units Vacant
2002	27	15.5	13.4	17.4
2003	25	13.8	8.2	18.8
2005	17	9.7	8.2	10.3
2006	14	8.5	7	9.3
2007	14	8.5	5.1	10.2
2008	21	12.8	7.3	15.6
2009	20	11.9	3.4	16.5
2010	19	11.3	1.7	16.5
2012	21	12.4	6.8	15.3
2013	21	12	5.8	14.6
2014	15	8.8	3.9	10.9
2015	17	10	2	13.4
2016	12	7.1	2	9.2
2017	10	5.8	0	8.3
2018	20	11.8	9.8	12.5
2019	19	11.2	7.8	12.7
2020	23	13.5	11.8	14.4

6.6.4 At the time of the most recent survey, there were also several vacant units within primary frontages representing 11.8% of outlets within this designation, a 4% increase upon the previous survey and a reflection that of the 4 newly vacant units 2 were on primary frontages. Like Monmouth, Chepstow has a relatively high level of vacancy on secondary shopping frontages which in Chepstow, is consistently higher than that seen for primary frontages, standing at 14.4% as per the most recent survey, a 1.7% on the previous survey. Units that were vacant at the time of the 2019 survey within primary frontages, included; Herbert Lewis Department Store, All About Eve and the Principality & Bidmead Cook estate agents. All these units were still vacant at the time of the 2020 survey.

Figure 6.9 Vacancy Rates over Time within the CSA

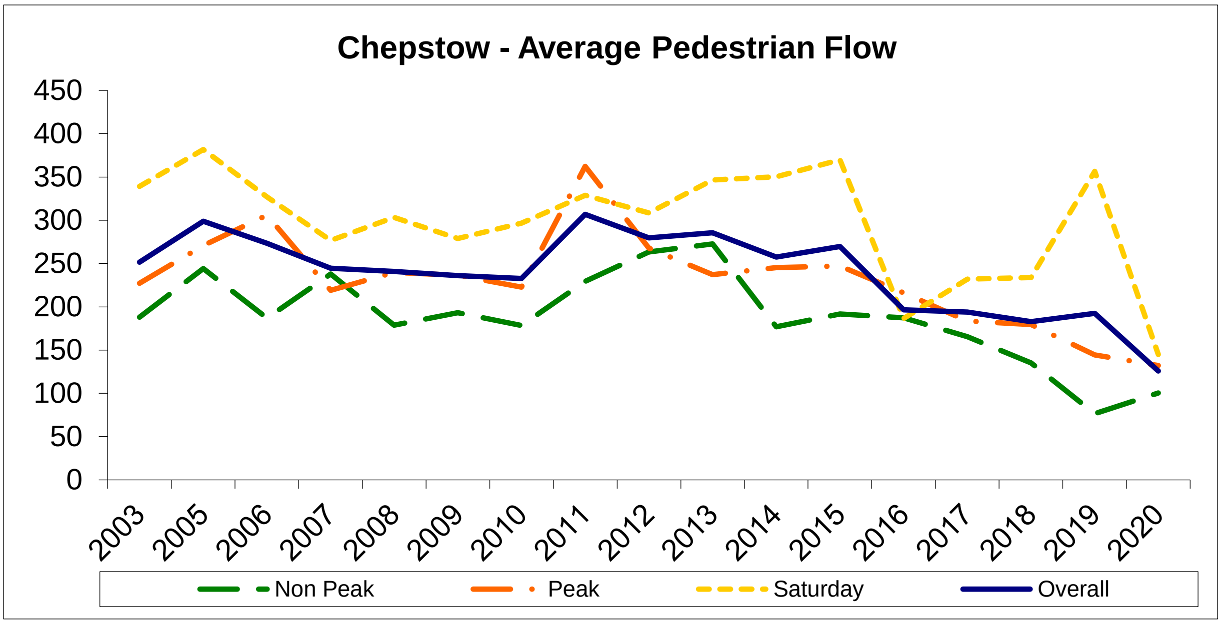


6.7 Pedestrian Flows

6.7.1 As part of the retail survey a pedestrian flow count is conducted at various strategic points throughout the town centre; Thomas Street, Moor Street, Welsh Street the Community Centre, Old Bell Chamber, St Mary's Arcade, Bridge Street, Upper Church Street and Station Road.

6.7.2 Since 2003, overall pedestrian flow has gradually declined. There was a noticeable decrease in 2016, largely influenced by the Saturday pedestrian flow and the overall flow has decreased again in 2020. The decrease in overall footfall in 2020, may be influenced by the pandemic, however the 2020 survey also recorded an increase in the non-peak average count where the Library Arcade location recorded the highest average count for the non-peak day. Despite the increase in the non-peak average count, all other average flows are at the lowest on record. The decrease in footfall in 2020, may be influenced by the pandemic.

Figure 6.10 Average Pedestrian Flow Rates over Time



6.7.3 The peak time for pedestrian flows within the Chepstow CSA is between 12pm -1pm coinciding with the lunch hour. However this was less than in previous years and may be due to increased numbers working from home in 2020. There are several areas of the CSA that have higher counts and these include; Welsh Street, Library Arcade and St Mary's Arcade.

6.8 Accessibility

6.8.1 Accessibility is an important element of a viable, attractive and thriving town centre. Accessibility refers to public transport, car parking provision, and pedestrian and cycle links.

6.8.2 The availability and cost of town centre parking can determine what mode of transport to use and can also influence the business performance of the CSA. Chepstow has several car parks, the Marks & Spencer Foodhall Car Park has 121 spaces, and two other car parks adjacent to the town centre provide a further 294 spaces, 23 of which are disabled bays. All of the carparks are subject to charging and appear to be popular and well used.

6.8.3 In addition to the above, 97 car parking spaces are located on Station Road, adjacent to the Tesco store and train station. The Tesco car park features 350 spaces and acts as a customer car park and a free town centre car park for one and a half hours. Furthermore, there is additional car parking provision in the lower part of the town (160 spaces, including 12 disabled bays). These car parks are subject to charging and are primarily for visitors to the castle and riverbank walkway.

6.8.4 Chepstow also functions as an important hub for public transport. There are bus services from Thomas Street which serve a wide catchment area including; Bristol and Cribbs Causeway, Lydney, Tintern, Gloucester, Monmouth, Caldicot Newport and Magor. There is also a train station located just outside the town centre but in close proximity to the Tesco supermarket, providing services to Cardiff and Birmingham however the pedestrian links to the town centre could be improved.

6.8.5 In terms of pedestrians, the centre has a relatively compact nature, although its topography is steep with the main streets following the form of a significant hill. The 110 metres of pedestrianisation along St. Mary's Street and the traffic free Bank Street arcade area are exceptions in the town centre where through traffic continues. The town is also the nodal point for the public footpath network.

6.8.6 Cycle links with the town are generally good with a National Cycle Network and a Regional Cycle Route converging on the town.

6.9 Environmental Quality

6.8.1 The whole of Chepstow’s commercial and retail core lies within a designated conservation area. The centre itself contains a range of listed buildings some of which date back to the 17th century. The medieval street pattern further reflects the age of the town, and features a gatehouse, narrow cobbled streets and a Port Wall. The environmental quality of the town centre is generally high and there is limited evidence of graffiti and litter.

6.10 Household Survey

6.10.1 The Council have conducted a series of household surveys over the past 20 years looking at the shopping patterns of people living in our main towns. The first survey was undertaken in 1997, this was then repeated in 2006 and then again in 2009 as part of a larger Retail and Leisure Study which was undertaken as a background study for the Local Development Plan. The latest survey was conducted in November 2015.

6.10.2 In November 2015, 1,005 telephone interviews were carried out within six identified zones based on the County's main retail centres and constructed to reflect the sphere of influence of each centre. A series of questions were asked in an attempt to establish the trade draw of the Counties central shopping areas. The key questions concerned the location of the households' main food shop, the location of any top-up convenience shopping and where local residents shop for a variety of comparison goods.

6.10.3 All of the household surveys which have been undertaken to feed into the Retail Background Paper follow a broadly similar methodology so that whilst they do not allow for an exact comparison they do give some indication, over time, of changing shopping habits.

Figure 6.11 Main Convenience Shopping Outlet

Outlet (%)	1997	2006	2009	2015
Tesco (town centre)	-	62	62	45
Somerfield (now Co-operative) (town centre)	28	12	9	-
Lidl (Bulwark)	-	2	7	15
Spar (Bulwark)	-	-	-	
Tesco Express (Thornwell)	-	-	2	14
Kwiksave (town centre)	9	-	-	-
Total Chepstow	38	76	81	74
Other Monmouthshire	29	12	5	11
Outside County	34	12	15	15
Newport	24	8	7	3
Bristol	3	2	-	7
Cwmbran	2	-	1	-
Lydney	2	1	-	-
Internet	-	-	-	4

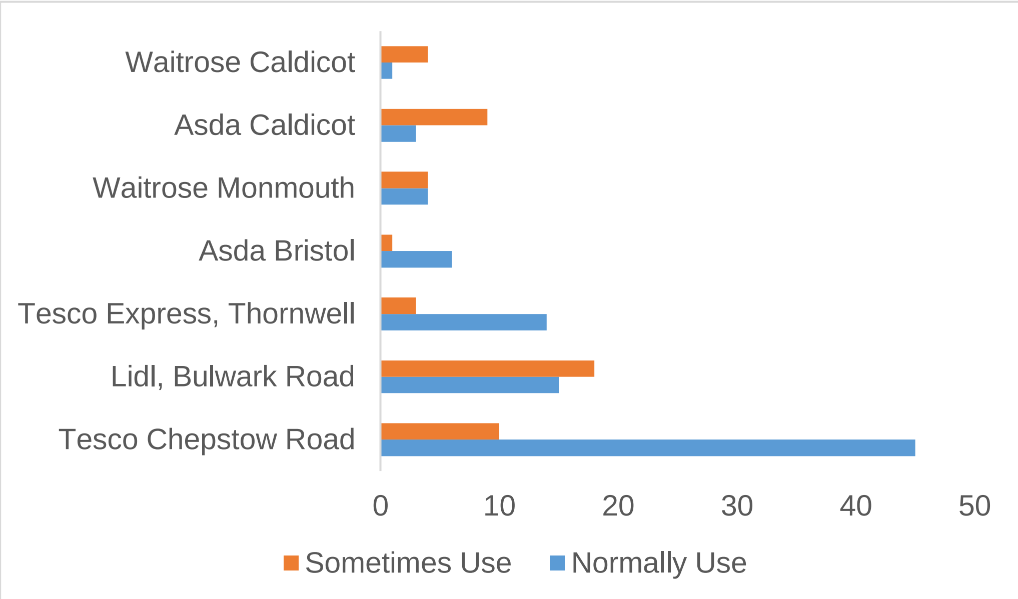
6.10.4 Of the people interviewed for the 2015 survey, three quarters do their main food shopping once a week or more often, this is in line with the response from respondents in the Chepstow catchment area.

6.10.5 Of those interviewed in the Chepstow zone 74% said they undertake their main convenience shopping in Chepstow, this is higher than for any of the other main towns. Chepstow is also acting as a trade draw to other settlements in the south of the County, with 23% of those interviewed in the Caldicot Zone and 13% of those in the Magor zone saying that they do their main food shop in Chepstow. However, this is at a lower level than that recorded at the time of the 2009 survey, with the Asda in Caldicot ensuring that a higher percentage of trade is retained in the settlement.

6.10.6 The edge of centre Tesco store continues to trade strongly, although the Lidl store in Bulwark has seen a significant growth in its share. The rise in the popularity of this type of store mirrors a national trend. The Co-Operative store in the centre was not trading at the time of the survey as it was undergoing a refurbishment and has been re-opened as a Marks & Spencer Foodhall.

6.10.7 In terms of the stores that the respondents visited for their main food shop, it is noticeable from the chart below that the Tesco store on Station Road (55%) and the Lidl in Bulwark Road (33%) have the largest share.

Figure 6.12 Stores Visited for Main Food Shop



6.10.8 Of those interviewed in the Chepstow zone, 68% said they do their top-up convenience shopping within the town, with a significant percentage doing their top-up shop elsewhere in the County, although some of these trips will be linked to place of employment. The Budgens store, which is outside of the town centre on the approach to the town from the Wye Valley, appears to be trading well in terms of top-up shopping. The percentage of interviewees who do their top-up shop at local stores and neighbourhood centres shows the continuing importance of these centres to the retail offer of the town.

Figure 6.13 Top up Convenience Shopping Outlet

Outlet (%)	1997	2006	2009	2015
Local Shops	15	3	5	11
Tesco Station Road	-	19	20	11

Somerfield (now Co-Operative) (town centre)	28	25	18	-
Kwiksave (town centre)	5	-	-	-
Lidl (Bulwark)	-	10	8	13
Spar (Bulwark)	8	2	9	2
Tesco Express (Thornwell)	-	-	8	14
Budgens	-	-	-	17
Total Chepstow	56	59	68	68
Other Monmouthshire	25	29	7	25
Outside County	19	12	24	7

6.10.9 The table below shows the percentage of those interviewed in the Chepstow Zone and their preferred locations for buying a range of comparison goods, of those shopping for these items outside of the County the other most popular destinations are shown. It can be seen from this that the trade draw away from the town is very dependent on the type of good.

Figure 6.14 Comparison Shopping

%	**Chepstow**	**Other Mon'shire**	**Internet**	**Outside County/Other**
1st choice clothes, footwear and other fashion goods	4	1	17	78 1. Bristol Cribbs Causeway - 30% 2. Newport, Spytty Retail Park – 15%
2nd choice clothes, footwear and other fashion goods	1	5	6	88 1. Bristol Cribbs Causeway - 19% 2. Newport, Spytty Retail Park – 19% 3. Cardiff – 14%
Books, music, DVDs and toys	12	2	50	36 1. Bristol Cribbs Causeway - 22%
Chemist goods, toiletries and cosmetics	69	6	3	22 1. Bristol Cribbs Causeway - 6%

%	Chepstow	Other Mon'shire	Internet	Outside County/Other
Furniture, carpets and soft furnishings	24	1	23	52 1. Bristol Cribbs Causeway - 26% 2. Newport, Spytty Retail Park – 8%
Household goods, glass, china and tableware	20	3	16	61 1. Bristol Cribbs Causeway - 30% 2. Newport, Spytty Retail Park – 6%
Electrical goods	3	1	40	56 1. Bristol Cribbs Causeway - 35% 2. Newport, Spytty Retail Park – 5% 3. Cardiff – 5%
DIY, hardware and gardening goods	63	5	2	30 1. Newport, Spytty Retail Park – 6% 2. Bristol Cribbs Causeway - 4%
Banking, financial and legal services	50	8	35	7

6.10.10 In comparison to shopping patterns for convenience goods where Chepstow retains a high percentage of the available trade, comparison good trade is being drawn away from the town. Chepstow's location with ease of access to the M4 means that the main trade draw away from the town is Cribbs Causeway in Bristol and Spytty Retail park in Newport. In the DIY sector, however, Chepstow retains the highest percentage of any of the towns with 25% of this accounted for by the Homebase in Thornwell so does not contribute to the vitality and the viability of the CSA.

6.10.11In some sectors it can be seen that significant numbers of respondents are shopping on-line, this is particularly noticeable for books, music, DVDs and toys, electrical goods and banking, financial and legal services.

6.10.12 As well as looking at the retail offer of the main towns, the survey also asked respondents about their choice of location for various leisure activities. With 74% of respondents saying they visit the cinema Chepstow has the highest percentage of any of the zones. Of those in the Chepstow catchment area who said they visited the cinema 55% said they usually went to the Cineworld in

Newport, with a further 28% going to the Vue Cinema at Cribbs Causeway, Bristol.

6.10.13 Respondents were also asked which gym or sports/leisure centre they usually used, 59% of those who use this type of facility said they used the Chepstow Leisure centre with a further 6% using the Curves gym in Chepstow, showing the importance of locally available facilities.

6.10.14 In terms of the respondents use of museums, art galleries and theatres people tended to travel further afield for these when they used them. An exception to this was for those in the Chepstow catchment area who normally visit museums, 32% would go to the local museum in Chepstow, with the rest fairly equally split between London (19%), Cardiff (18%) and Bristol (14%). Of those respondents who visit art galleries there was again a fairly equal split between Bristol (30%), London (29%) and Cardiff (26%). For those respondents who go to the theatre 44% would go to Bristol with a further 23% visiting Cardiff.

6.11 Town Centre Initiatives and Regeneration Programmes

6.11.1 A £2.5 million Chepstow High Street Regeneration Scheme, completed in the summer of 2005, dramatically changed the face of Chepstow Town Centre. The increased pedestrian friendliness of the streetscape has drawn praise from around the UK winning a succession of prestigious awards. Receipt of additional funding enabled the scheme to be extended into Moor Street and Welsh Street in 2007, greatly enhancing the public realm of the wider town centre.

6.12 Future Retail Development

6.12.1 At the time of writing this report there are no proposed retail developments with either outline or full planning permission within the CSA of Chepstow.

7 MONMOUTH

7.1 Background

7.1.1 The historic town of Monmouth is situated at the north eastern boundary of the County between the River Wye and the River Monnow. The town acts as the gateway into Wales from the Midlands and the North of England via the A40. The population of Monmouth at the time of the 2011 Census was 10,500, however, its role as a hub serves a wider rural hinterland including parts of the Forest of Dean. The town is linear in form reflecting its medieval street pattern. The town hosts several markets each week. Two at the bottom of Monnow Street on a Friday and a Saturday and one in Agincourt Square outside the Shire Hall on a Saturday, featuring local produce, and attracting visitors from the wider area.

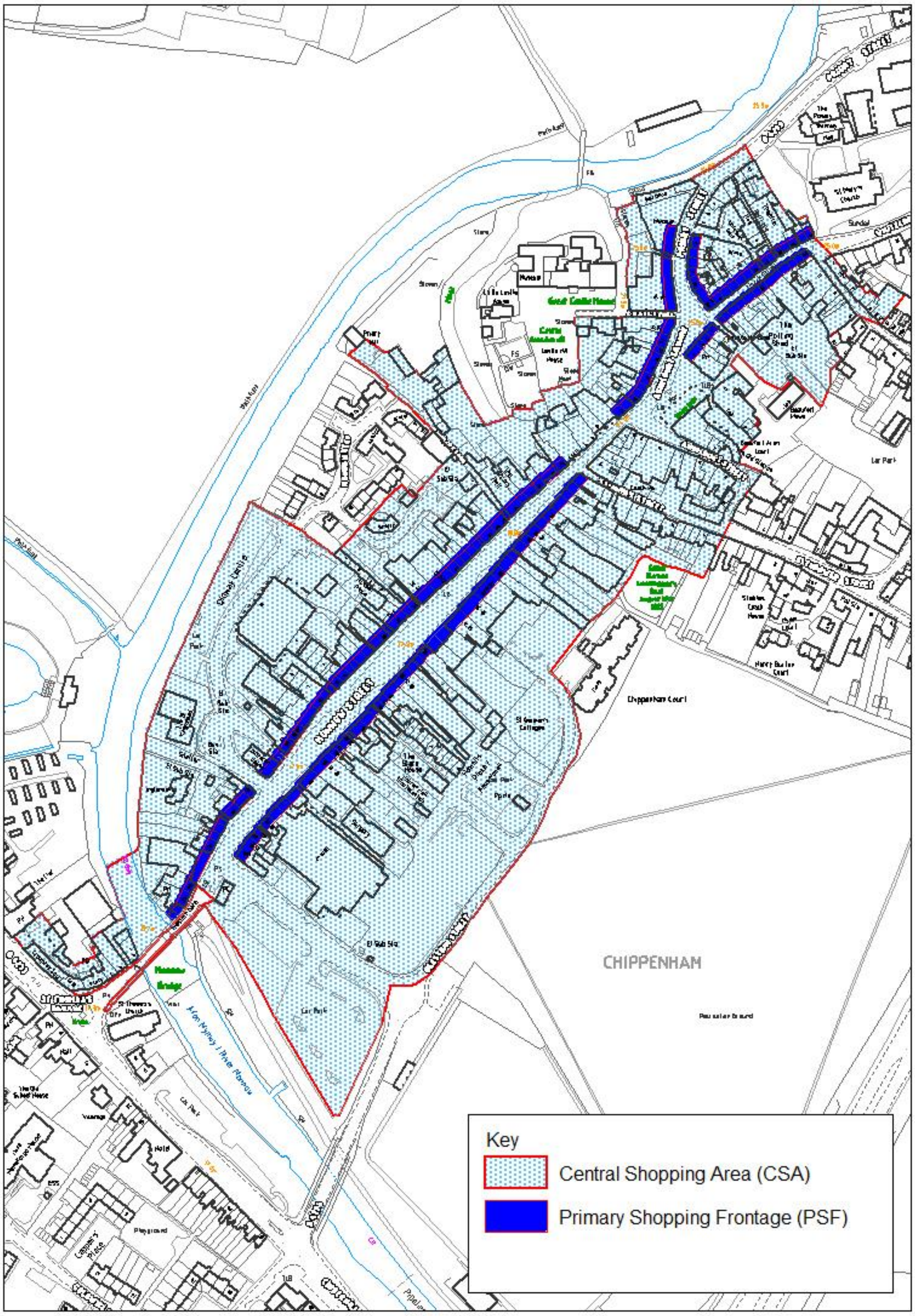
7.1.2 Policy RET2 of the Adopted LDP has defined for planning purposes the retail core of the town centre as a Central Shopping Area (CSA). The CSA relates to the central area, which provides a broad range of facilities and services and fulfils a function as a focus for both the community and public transport. However, the CSA is not exclusive to shopping and retailing activities exist outside of this area.

7.1.3 In addition to the above the Adopted LDP also contains Policy RET1 - Primary Shopping Frontages (PSF) which specifically focuses on primary shopping frontages within the CSA and sets out the criteria for considering non-retail proposals within these frontages. The policy gives priority to retail (A1 uses) in the town centres' primary shopping frontages and seeks to protect the predominant shopping role and character of the main towns by controlling the loss of retail units within such frontages.

7.1.4 The Primary Shopping Frontages Supplementary Planning Guidance (SPG), published in April 2016, provides clarification for both applicants and the Council in the interpretation and implementation of Policy RET1. The SPG assists decision making by setting out guidance on the criteria based approach for assessing proposals for non-retail use classes in the County's primary shopping frontages. In particular, this SPG clarifies the proportion of ground floor units in non-retail use that the Council considers acceptable within the specified frontages. The identified maximum thresholds for non-A1 uses in the County's primary shopping frontages are provided in Appendix D.

7.1.5 The area occupied by the CSA and PSF in Monmouth is shown in figure 7.1 below.

Figure 7.1 Monmouth Central Shopping Area (CSA) and Primary Shopping Frontage (PSF) (LDP)



7.2 Shopping Hinterland

7.2.1 The shopping catchment area for Monmouth extends far beyond the immediate town itself into a wider hinterland. The catchment covers a largely rural hinterland from Raglan in the west towards Coleford in the east. The hinterland extends as far north as Skenfrith and Llangarron and towards Llangwm and Trellech in the south (Appendix A). The 2011 census indicates a resident population of some 26,000 living within 11,000 private households within this area.

7.2.2 Using Paycheck data we are able to look at the profile of this resident population. The Paycheck dataset developed by CACI indexes annual household income from data available from the Census, and other market research including lifestyle surveys. Subsequently, it indicated that the mean income of households in the catchment area of Monmouth in 2020 was £43,609 relative to £45,193 for the county as a whole, and £36,234 for Wales. Out of the households in the Monmouth catchment area, 18% are below 50% of the median income for the UK, and 24% below 60%. This compares to 17% and 22% respectively for Monmouthshire, and 25% and 33% for Wales as a whole (Appendix B).

7.3 Diversity of Uses

The 2020 survey sustains a trend of the decreasing proportion of comparison outlets of which there are now 73 representing 38.8% of outlets within the CSA. In 2005 there were nearly 100 comparison outlets representing over 50% of outlets within the CSA. However, since 2005 their number and proportion has reduced by 26 and over 11% respectively. This trend is also seen in the other County towns of Abergavenny and Chepstow. The number of convenience outlets has remained relatively stable, the 2020 survey recorded their proportion within the CSA at 8.5%, a minor increase on the previous 2 surveys. Whilst service uses still account for a significant proportion (37.2%) and over a third of all outlets within the CSA, their number and proportion has decreased since 2016, unlike in Abergavenny and Usk which have seen increases in service outlets. From a high of 79 in 2016 the 2020 survey recorded 70 service outlets within the CSA.

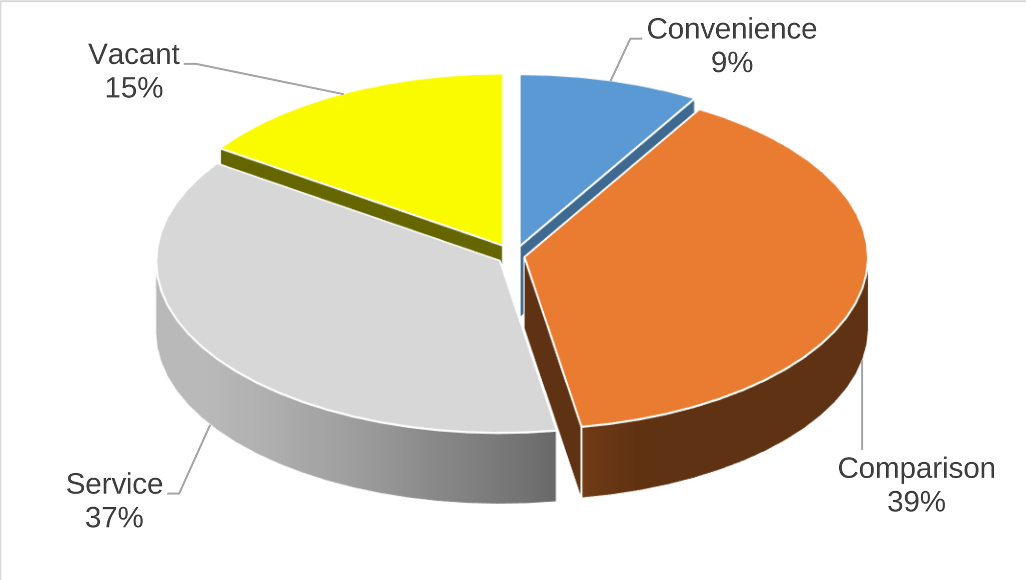
Figure 7.2 Number of Outlets within the CSA by Use Type over Time

	Convenience No.	Outlets %	Comparison No.	Outlets %	Service No.	Outlets %
2002	19	10.2	94	50.3	56	29.9
2005	14	7.9	99	50.3	53	29.9
2006	15	8.7	98	56.6	51	29.5
2007	15	8.7	96	54.2	50	28.2
2008	15	8.5	97	55.1	52	29.5
2009	16	9.1	95	53.9	56	31.8

2010	14	8	88	50.3	59	33.7
2012	14	7.9	89	50	64	35.9
2013	16	8.5	87	46	72	38.1
2014	18	9.3	86	44.6	73	37.8
2015	16	8.5	83	44.6	72	38.7
2016	15	8.1	82	44.3	79	42.7
2017	14	7.5	81	43.3	73	39
2018	15	8.0	80	42.6	74	39.4
2019	15	8.0	77	41.0	69	36.7
2020	16	8.5	73	38.8	70	37.2

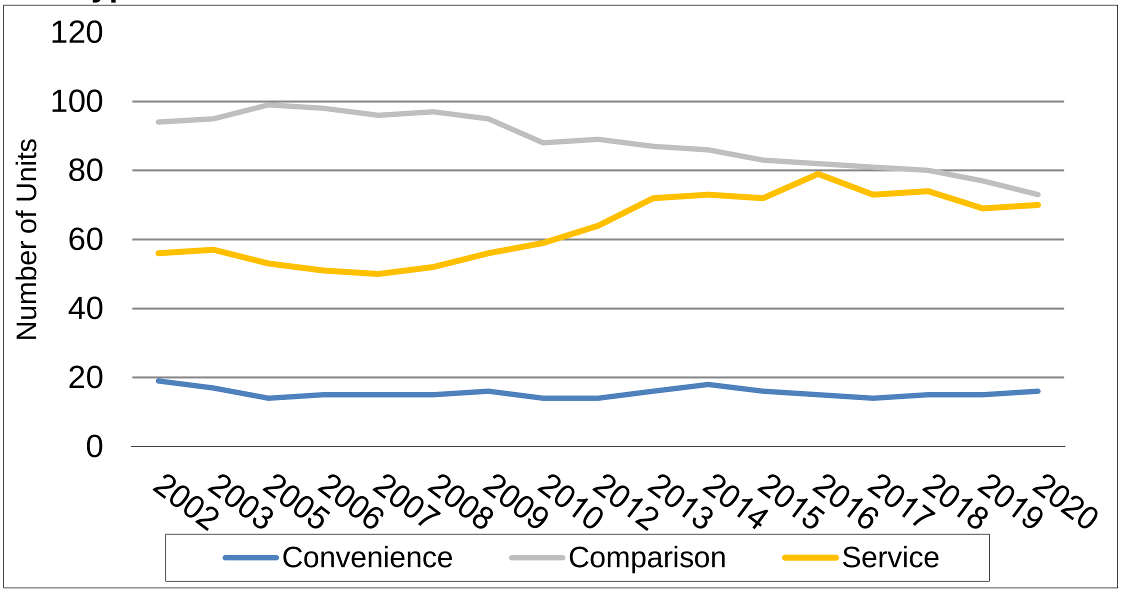
Note: Percentages include vacant units which are dealt with separately in section 7.6

Figure 7.3 Percentage of Outlets by Use Type within the CSA



7.3.2 A comparison of surveys over time shows that the difference between the number of service outlets and comparison goods outlets has narrowed. In more recent years this has been largely due to the decrease in the number of comparison outlets as opposed to an increasing number of service uses which have declined since 2016.

Figure 7.4 Comparison of the Number of Outlets within the CSA by Use Type over time



7.3.3 Figure 7.5 illustrates the diversity of uses within the CSA in regard to floorspace. This data relates to the town centre as defined by the Local Development Plan.

Figure 7.5 Percentage over Time of Floorspace Use within the CSA

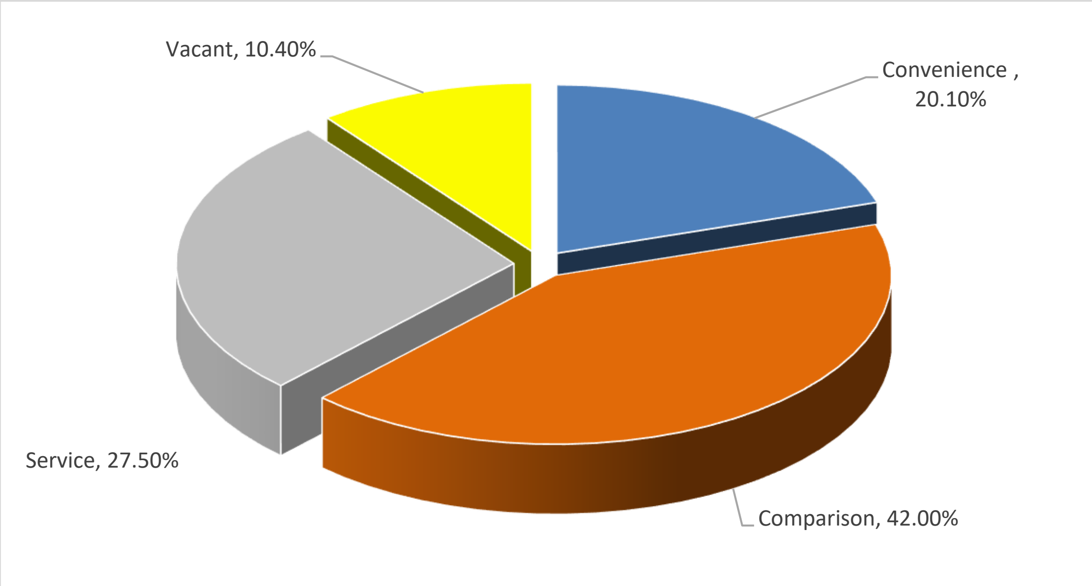
Year	Comparison %	Convenience %	Service %
2002	49	27	16
2005	54	26	18
2006	56	25	15
2008	52	26	19
2010	45	29	21
2012	43	29	23
2013	44	28	24
2014	43	24	27
2015	41	24	27
2016	41	24	31
2017	38	21	29
2018	42	21	29
2019	43	20	28
2020	42	20	28

Note: Total and percentage figures include vacant units which are dealt with separately in section 7.6

7.3.4 Monmouth town centre as defined by the Adopted Local Development Plan has an estimated net retail floorspace of approximately 19,500m^2 in

2020, with comparison floorspace accounting for 42%, convenience 20% and service 28%.

Figure 7.6 Percentage of Floorspace Use by Retail Type



7.3.5 The most recent survey shows that whilst convenience and service floorspace has remained consistent, the comparison proportion has decreased marginally. Vacant floorspace has increased by 0.5% on the previous survey which may, in part reflect the impact of the pandemic on the high street. Convenience uses still account for one fifth of retail floor space but only represent 8.5% of all uses in the CSA. Within the CSA national retailers such as Waitrose, the Marks & Spencer Food Hall and Iceland when combined account for nearly 80% of convenience floorspace and over 15% of floorspace within the CSA in 2020. This reflects that there are relatively few convenience uses within the CSA, but that these occupy reasonably large premises. The 2020 survey recorded a new local convenience outlet on Monnow Street.

7.3.6 In addition to the retail and service uses, the town centre contains a number of important non-retail uses including, the Council offices and Shire Hall, a library, museum, tourist information centre and other tourist attractions. There is a Police station, educational establishments, a doctor’s surgery, churches and chapels, private sector offices and a significant number of residential dwellings both within and adjacent to the commercial core. However, two national banks in Natwest and Santander have relatively recently vacated are no longer represented within the town.

7.3.6 Outside of the central shopping area are a number of small corner shops and one petrol filling station shop and beyond the immediate periphery of the town centre, Neighbourhood Centres exist which provide a retail offer of a local nature. Monmouth has two such centres located at

Overmonnow and Wyesham. Whilst detailed retail surveys of these centres have not been undertaken, the composition of each at the time of the 2020 survey was as follows:

Overmonnow -	*Yummies Takeaway* *Vacant (Previously Bargain Booze Plus)*
Wyesham -	*McColls General Stores & Post Office*

7.3.8 It is noted that since the survey was undertaken, the vacant unit at the Overmonnow centre has become occupied.

7.3.9 A 1286m^2 Lidl foodstore also began trading in 2008, this is located in Wyesham at the junction of Redbrook Road and Staunton Road.

7.3.10 In addition to the above, there is a relatively newly established retail complex on the Rockfield Road featuring a Co-op food store, Fish and Chip Shop, Bike shop and a vets.

7.4 Retailer Representation

7.4.1 Despite the moderate size of the market town, Monmouth has a relatively high proportion of national multiple retailers, accounting for a total of 17% of the outlets in the CSA. Convenience shopping is well represented within the town centre, with a Waitrose, Marks & Spencer Foodhall, and Iceland all represented. Independent convenience retailers remain within the town centre, with two butchers, a greengrocer and 2 bakeries. The comparison sector also features several national retailers including Homebargains, White Stuff, Joules, Fat Face and Jo Jo Maman Bebe in the clothing sector, and Superdrug and Boots in the cosmetic sector. There are several local and independent comparison outlets which tend to occupy smaller units within the CSA away from the concentration of national retailers in Monnow Street.In other sectors the CSA also has a WH Smith (books/stationery), and Specsavers as well as a Vision Express. Since the previous survey no national retailers have established themselves in the CSA. The unit once occupied by Subway was vacant at the time of the survey and the pandemic has resulted in the administration of Peacocks and Edinburgh Woollen Mill, however these were both trading at the time of the survey.

Figure 7.7 Number of National Retailers within the CSA over Time

Year	Number of Outlets
2006	37
2010	36
2012	37
2013	36
2014	35
2015	34
2016	33
2017	33
2018	32
2019	33
2020	32

Note: figures do not include charity shops

7.4.2 There is also a broad range of services within the CSA, including national banks and building societies, travel agents and estate agents. The town is well served by cafes, restaurants, pubs and bars, both national chains and independent. Similar to other town centres in Monmouthshire, a significant trend in recent years has been the growth in representation of chain restaurants and cafes. In Monmouth, the opening of outlets such as Costa, Coffee @1, Café Nero, and Pizza Express reflects a trend seen in both Abergavenny and Chepstow. Figure 7.7 indicates that the representation of national retailers has remained relatively stable since 2016.

7.4.3 In 2020 there were 7 charity shops trading in the CSA, representing 3.7% of all the centres outlets. This figure has remained relatively stable in recent years reflecting the fact that charity shops are an established element of retail in Monmouth's CSA. However, since 9 were recorded in 2018 both the Mind (2019) charity shop and the Age Concern Cymru (2020) charity shops have closed. All of the charity shops are of a national nature.

7.5 Retailer Demand and Intention to Change Representation

7.5.1 The most significant changes to have taken place in the town centre over the last twenty years, have been the opening of a Waitrose supermarket in 1997 as well as the opening of a Marks and Spencer Food hall. These developments are considered as major investments in the town providing high quality anchors for the centre as a whole. Prior to these developments the opening of the Oldway Centre, comprising 8 units and a Somerfield (then Budgens, and now Homebargains) store was completed in 1988. The Beaufort Arms Court development provided 7 small units aimed at specialist retailers, however 2 of the units within this complex were vacant at the time of the 2020 survey.

7.5.2 The information available on retailer demand and intentions to change representation in Monmouth is limited. The main thoroughfare of Monnow Street has seen relatively little difference since the previous survey which noted that a couple of shops had re-located to an alternative premises on the street. The biggest difference in the most recent survey was that some premises had become vacant including Subway, and Tidings Cards and Gifts, however Get Connected had also occupied a previously vacant unit on Monnow Street and a new estate agent had established itself as well. In relatively recent years, the likes of New Look, Natwest, and the original Specsavers premises have all shut. Whilst the original Specsavers premises remains vacant, national chains including White Stuff, Joules, Jojo Maman Bebe, Mountain Warehouse, Card Factory and Home Bargains have established themselves relatively recently demonstrating demand from national retailers.

7.5.3 Other retailers are also investing in the town. There is a long established Wetherspoons at the King's Head Hotel and in more recent years' national chains such as Costa Coffee, Coffee#1, Cafe Nero and Pizza Express have all located in the town occupying prominent positions on Monnow Street at the time this report was written. Some of these chains have been in place in Monmouth for several years now and can be considered as established and a crucial element of retail within the CSA.

7.5.4 Overall, retailer/investor confidence has not shown any signs of decline in recent years and over the long term the addition of key national multiples in the centre has strengthened its position.

7.6 Vacancies

7.6.1 The number of vacant units within a town centre is a useful barometer of the health of the town centre and how well it is trading. However, national planning policy advises that whilst vacancy rates are a useful guide for measuring vitality and viability, vacancies can arise in the strongest of centres.

7.6.2 Figure 7.8 illustrates the current and past vacancy rates for Monmouth's CSA.

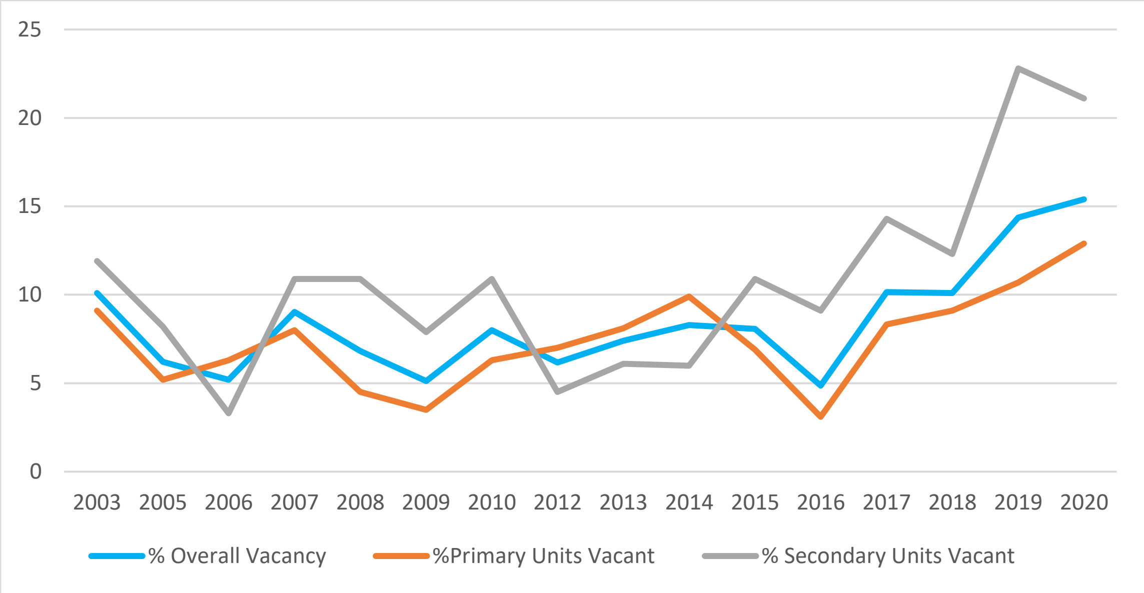
7.6.3 Figure 7.8 illustrates that the number of vacant units within Monmouth's CSA has increased again therefore sustaining the relatively high number of vacant units seen after the significant increase in the previous survey. The 2020 survey found that 15.4% of all units within the CSA were vacant, representing an increase of 1% since the previous survey. This is the highest proportion on record. This may, in part reflect the impact of the pandemic on the high street.

Figure 7.8 Number of Vacant Units Over Time within the CSA

Year	No. Vacant Units	% Overall Vacancy	% Primary Units Vacant	% Secondary Units Vacant
2003	19	10.1	9.1	11.9
2005	11	6.2	5.2	8.2
2006	9	5.2	6.3	3.3
2007	16	9,1	8	10.9
2008	12	6.8	4.5	10.9
2009	9	5.1	3.5	7.9
2010	14	8	6.3	10.9
2012	11	6.2	7	4.5
2013	14	7.4	8.1	6.1
2014	16	8.3	9.9	6
2015	15	8.1	6.9	10.9
2016	9	4.9	3.1	9.1
2017	20	10.4	8.33	14.3
2018	19	10.1	9.1	12.3
2019	27	14.4	10.7	22.8
2020	29	15.4	12.9	21.1

7.6.4 Since 2017, Monmouth CSA has sustained a relatively high number of vacant units, and similar to levels seen in the early 2000s. In 2019 there was a significant increase in the number of vacant units and the 2020 survey records a further increase in the number of vacant units, however this is relatively marginal in comparison to the previous survey. Primary shopping frontages have seen a significant increase of 2.2% this year with several new vacancies including Subway, Tidings Cards and Gifts and The Square all on primary frontages.

Figure 7.9 Vacancy Rates over Time within the CSA



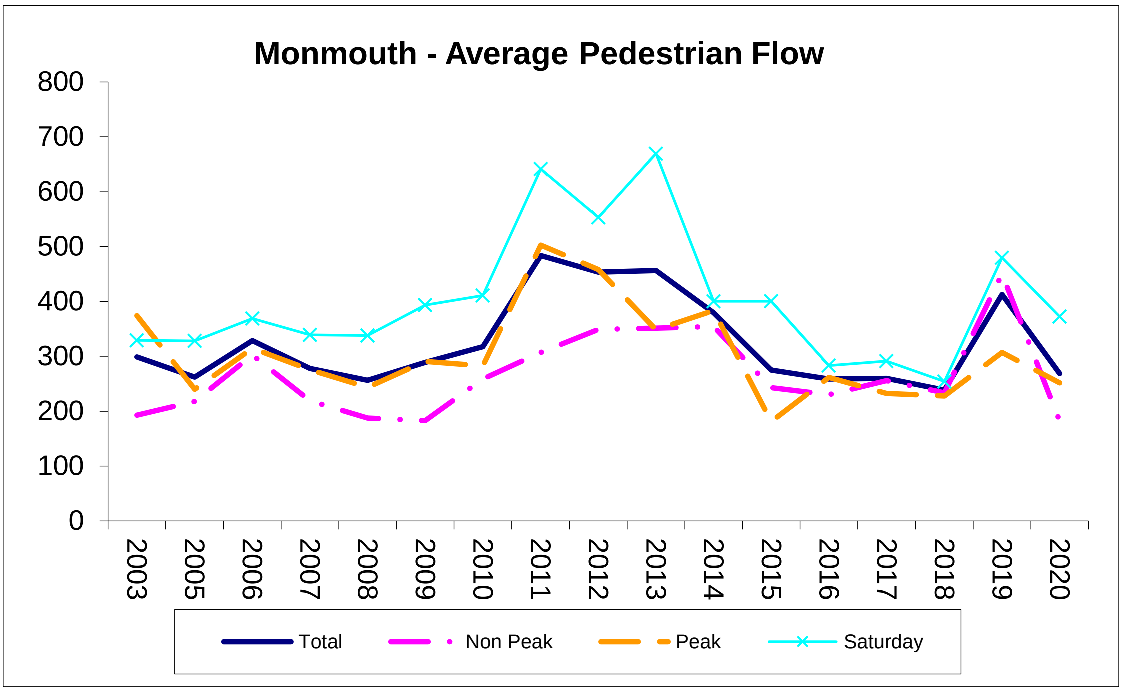
7.7 Pedestrian Flows

7.7.1 As part of the retail survey a pedestrian flow count is undertaken at strategic points within the town; outside Waitrose, Priory Street, Church Street, Agincourt Street, St John's Street, Howells Place, Oldway Centre (Monnow Street), Somerfield (Riverside), Bus Station Access, Cattle Market Access, and Monnow Bridge.

7.7.2 There has been considerable fluctuation in pedestrian flows in Monmouth over the 2003-2020 period. Despite a sharp fall in 2014, and a declining trend since, in 2019 the footfall survey recorded a sharp increase across all counts. However, the 2020 footfall survey recorded a decrease in all counts in particular the non-peak count. The decrease in footfall in 2020, may be influenced by the pandemic.

7.7.3 A large proportion of pedestrian movement in 2020 was between 11am-1pm, largely coinciding with the lunch hour. However this was less than in previous years and may be due to increased numbers working from home in 2020. The areas of the Central Shopping Area with the highest pedestrian footfall were Agincourt Street and St. John's Street. Another count point which sees a higher level of pedestrian footfall is the entrance to the Oldway Centre. This suggests that Home Bargains, now well established, has been a popular addition to the CSA and that people may be using the associated car park. The highest average count in 2020, was recorded on the Saturday as illustrated in figure 7.10.

Figure 7.10 Average Pedestrian Flow Rates over Time



7.8 Accessibility

7.8.1 Accessibility is an important element of a viable, attractive and thriving town centre. Accessibility refers to public transport, car parking provision, and pedestrian and cycle links. The availability and cost of town centre parking can determine what mode of transport to use and can also influence the business performance of the CSA. Monmouth town centre is reasonably well provided for in this respect, with 4 fairly central car parks not including the provision on Monnow Street which provides 39 spaces, 2 of which are disabled spaces. The other 4 car parks provide 363 spaces of which 36 are disabled spaces with 4 electric vehicle charging spaces available at the Glendower Street car park. It appears that the car parks within the town are popular and well used. There is additional parking at the Waitrose store, however this is time limited at 1 hour.

7.8.2 Monmouth also plays a role as an important public transport node. The town bus station is ideally located within the town centre and bus services serve a relatively wide catchment; including Gloucester; Newport; Hereford; Abergavenny and Ross-on-Wye. The town is not served by the rail network.

7.8.3 Although the town centre is built on a slight hill, in terms of pedestrians, Monnow Street retains a relatively gentle topography. The further widening of pavements at the top of Monnow Street as well as the public realm works in Agincourt Square has been advantageous for pedestrians and made the Monmouth CSA more accessible. The pedestrianisation of Church Street, Beaufort Court and The Oldway Centre provides a large area of traffic free shopping. The town is also the nodal point for the public footpath network, with a national cycle route also passing through the town.

7.9 Environmental Quality

7.9.1 Monmouth's commercial core falls within a designated conservation area that retains its 18th Century appearance with large coaching inns and large town houses. The remains of a castle, town wall, medieval street plan and fortified bridge provides an attractive historic environment for the town. The recently completed public realm works in Agincourt Square also enhance the environment at this end of the CSA. The town centre's environmental quality is generally high with limited evidence of litter and graffiti.

7.10 Household Survey

7.10.1 The Council have conducted a series of household surveys over the past 20 years looking at the shopping patterns of people living in our main towns. The first survey was undertaken in 1997, this was then repeated in 2006 and then again in 2009 as part of a larger Retail and Leisure Study which was undertaken as a background study for the Local Development Plan, the latest survey was conducted in November 2015.

7.10.2 In November 2015; 1,005 telephone interviews were carried out within six identified zones based on the County's main retail centres and constructed to reflect the sphere of influence of each centre. A series of questions were asked in an attempt to establish the trade draw of the Counties central shopping areas. The key questions concerned the location of the households' main food shop, the location of any top-up convenience shopping and where local residents shop for a variety of comparison goods.

7.10.3 All of the household surveys which have been undertaken to feed into the Retail Background Paper follow a broadly similar methodology so that whilst they do not allow for an exact comparison they do give some indication, over time, of changing shopping habits.

7.10.4 Of those interviewed for the 2015 survey three quarters do their main food shopping once a week or more often, this is in line with the response from respondents in the Monmouth catchment area.

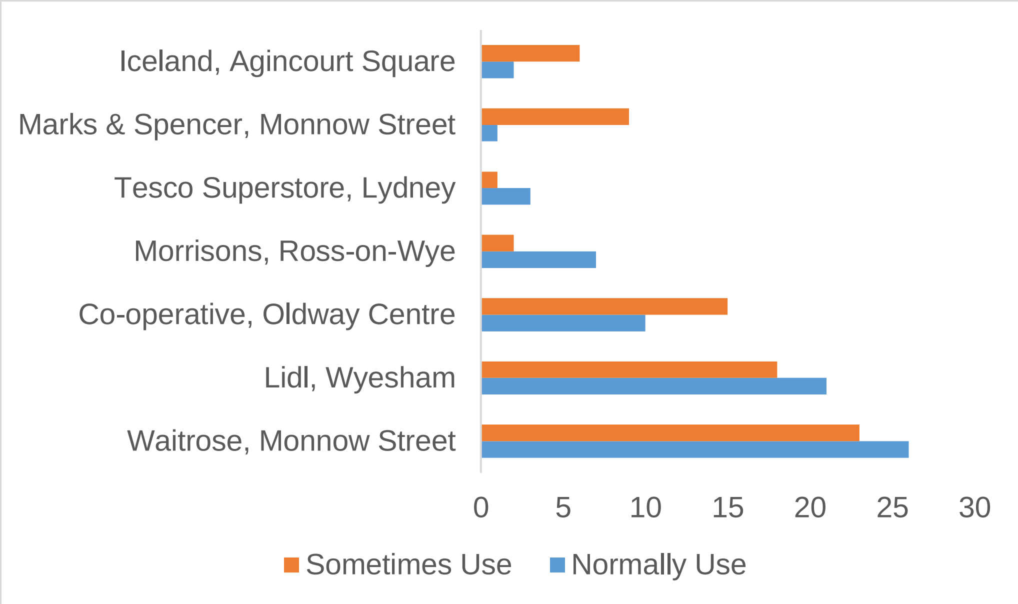
7.10.5 Of those interviewed in the Monmouth zone 61% said they undertake their main convenience shopping in Monmouth, this is lower than for either Abergavenny or Chepstow. The most noticeable recent change is the high percentage of respondents (21%) who are undertaking their main food shop in the Lidl store in Wyesham, from the responses it would appear that it is drawing some trade away from the Waitrose store in the CSA. The rise in the popularity of this type of store mirrors a national trend.

Figure 7.11 Main Convenience Shopping Outlet

Outlet (%)	**1997**	**2006**	**2009**	**2015**
Waitrose	35	41	31	26
Co-operative (Somerfield – 2006)	24	27	12	10
Kwiksave	13	-	-	-
Lidl, Wyesham	-	-	8	21
Marks & Spencer	-	1	1	1
Iceland	-	-	1	2
Local Shops	2	2	1	1
Total Monmouth	74	71	54	61
Other Monmouthshire	8	9	4	3
Outside County	18	16	42	30
Ross-on-Wye	7	7	9	9
Newport	2	2	2	5
Hereford	2	3	4	3
Internet	-	4	-	6

7.10.6 In terms of the stores that the respondents visited for their main food shop, it is noticeable from the chart below that the Waitrose store in Monnow Street (49%), The Lidl store in Wyesham (39%) and the Co-operative in the Oldway Centre (25%) have the largest share. Since the time of the last survey the Co-Operative store has closed meaning that Waitrose and Lidl may now have a larger share as a result.

Figure 7.12 Stores Visited for Main Food Shop



7.10.7 Of those interviewed in the Monmouth zone 72% said they do their top-up convenience shopping within the town, for those shopping elsewhere some of these trips are likely to be linked to place of employment. As with the retail destination for the main convenience shop the out of centre Lidl store at Wyesham appears to be trading well in terms of top-up shopping. The percentage of interviewees who do their top-up shop at local stores and neighbourhood centres shows the continuing importance of these centres to the retail offer of the town.

Figure 7.13 Top up Convenience Shopping Outlet

Outlet (%)	1997	2006	2009	2015
Local Shops	34	12	8	11
Waitrose	24	36	17	26
Co-operative (Somerfield – 2006)	24	27	7	12
Lidl, Wyesham	-	-	5	14
Marks & Spencer	-	5	4	5
Kwiksave	6	-	-	-
Iceland	-	-	2	4
Total Monmouth	88	80	43	72
Other Monmouthshire	4	8	7	9
Outside County	8	12	50	19

7.10.8 The table below shows the percentage of those interviewed in the Monmouth Zone regarding their preferred locations for buying a range of comparison goods, of those shopping for these items outside of the County the other most popular destinations are shown. It can be seen from this that the trade draw away from the town is very dependent on the type of good.

Figure 7.14 Comparison Shopping

%	Monmouth	Other Mon'shire	Internet	Outside County/Other
1st choice clothes, footwear and other fashion goods	10	2	9	79 1. Hereford - 18% 2. Newport, Spytty Retail Park – 17% 3. Cwmbran – 11%
2nd choice clothes, footwear and other fashion goods	7	3	7	83 1. Newport, Spytty Retail Park – 16% 2. Hereford– 13% 3. Bristol Cribbs Causeway - 12% 3. Cardiff – 12%
Books, music, DVDs and toys	31	1	39	29 1. Bristol Cribbs Causeway - 6% 2. Newport, Spytty Retail Park – 5%
Chemist goods, toiletries and cosmetics	67	4	2	27 1. Hereford - 5% 2. Ross-on-Wye – 5%
Furniture, carpets and soft furnishings	20	2	18	60 1. Hereford - 17% 2. Bristol Cribbs Causeway - 11%
Household goods, glass, china and tableware	16	2	10	72 1. Cardiff - 17% 2. Bristol Cribbs Causeway - 13%
Electrical goods	10	1	37	52 1. Cwmbran - 11% 2. Hereford – 9% 3. Cardiff – 9%
DIY, hardware and gardening goods	41	6	4	49 1. Cwmbran – 8%

%	Monmouth	Other Mon'shire	Internet	Outside County/Other
				2. Hereford - 5% 3. Ross on Wye – 5%
Banking, financial and legal services	61	4	20	15 1. Ross-on-Wye – 5% 2. Hereford – 3%

7.10.9 In comparison to the shopping patterns for convenience goods where Monmouth retains a high percentage of the available trade, comparison goods trade is generally being drawn away from the town. Monmouth's location means that the main trade draws away from the town are both locations in Wales but also across the border in England.

7.10.10 In some sectors it can be seen that significant numbers of respondents are shopping on-line, this is particularly noticeable for books, music, DVDs and toys and electrical goods.

7.10.11 As well as looking at the retail offer of the main towns, the survey also asked respondents about their choice of location for various leisure activities. Of those in the Monmouth catchment area who said they visited the cinema 44% said they usually went to the Savoy Theatre and Cinema, with 18% using the Cineworld in Newport and 11% the Studio Cinema in Coleford, showing that where there is a local cinema it is well used.

7.10.12 Respondents were also asked which gym or sports/leisure centre they usually used, 72% of those who use this type of facility said they used the Monmouth Leisure centre, showing the importance of locally available facilities.

7.10.13 In terms of the respondents use of museums, art galleries and theatres people tended to travel further afield for these when they used them. For those in the Monmouth catchment area who normally visit these, 35% would go to London to visit a museum, 41% would go to London to visit an art gallery and 23% would go to London for the theatre. Although the presence of a local theatre in the town means that 20% would visit the theatre in Monmouth.

7.11 Town Centre Initiatives and Regeneration Programmes

7.11.1 In March 2004, a second bridge over the River Monnow into Monmouth town centre was opened providing an improved southern access for shoppers and visitors, as well as vehicles servicing the town centre. The new bridge has taken pressure off of the historic Monnow Bridge, which has been closed to traffic and a pedestrianisation scheme was implemented in 2004.

7.11.2 The Shire Hall Restoration Project has resulted in the renovation of this keynote building in the 'citadel' of the town, and provided a vital community facility for Monmouth as well as pedestrianised area which hosts public art displays and a weekly market.

7.11.3 Monmouthshire County Council, along with Welsh Government funding and Monmouth Town Council have plans to improve Agincourt Square. The aim is to encourage pedestrians into a regenerated public space, that is not only more enhanced but safer for pedestrians. The plans involve widening and improving the paved surfaces as well as installing defined crossing points on a new carriageway. This work was completed in the Autumn of 2020 and has enhanced this area of the town making for a safer and more pleasant experience for shoppers.

7.12 Future Retail Development

7.12.1There are currently no proposed new large-scale retail developments in Monmouth Town CSA.

8 USK

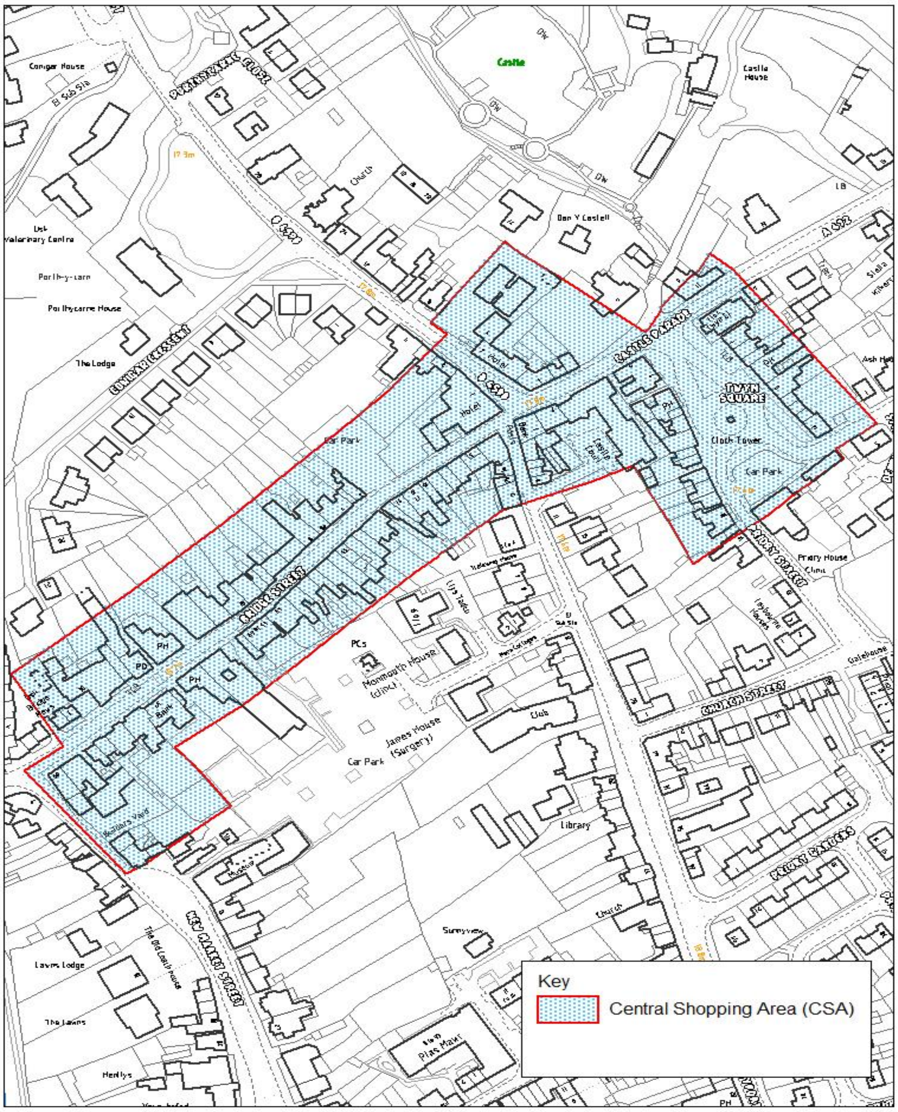
8.1 Background

8.1.1 The relatively small historic town of Usk is located fairly centrally in the County, just off the A449. The population is approximately 2,800 (2011 Census), however it serves an extensive rural hinterland, extending to Raglan to the north east.

8.1.2 Policy RET2 of the Adopted Local Development Plan (LDP) has defined the retail core of the town centre as a Central Shopping Area (CSA) for the purposes of planning. The CSA is a central area with a range of services and facilities, and also functions as a focal point for public transport and the community. However, the CSA is not exclusive to shopping and retailing activities exist outside of this area.

8.1.3 The area occupied by the CSA in Usk is shown in figure 8.1 below.

Figure 8.1 Usk Central Shopping Area (CSA) (LDP)



8.2 Shopping Hinterland

8.2.1 The Usk shopping hinterland is more compact than the large rural catchments that serve the principal market towns. However, the catchment area extends to Raglan in the north east, Llangybi to the south and Llansoy to the east (Appendix A). The 2011 census indicates that approximately 8,000 residents live in 3,400 households in the above area.

8.2.2 Using Paycheck data we are able to look at the profile of this resident population. The Paycheck dataset developed by CACI indexes annual household income from data available from the Census, and other market research including lifestyle surveys. Subsequently, it indicated that the mean income of households in the catchment area of Usk in 2020 was £47,797, relative to £45,193 for the county as a whole, and £36,234 for Wales. Out of the households in the Usk catchment area, 15% are below 50% of the median income for the UK, and 20% below 60%. This compares to 17% and 22% respectively for Monmouthshire, and 25% and 33% for Wales as a whole (Appendix B).

8.3 Diversity of Uses

8.3.1 The 2014 survey revealed that service goods accounted for half of all outlets in the Usk CSA. After a gradually decreasing number and proportion in the period since 2014, service uses now account for over half (52.5%) of uses within the CSA. At the time of the 2020 survey, a number of service uses including microbreweries and pubs as well as beauty salons had established themselves in previously vacant units resulting in an increase in the number and proportion of service uses. The number of convenience uses has remained relatively stable since 2017, however this has also marginally increased this year to 4 outlets representing 6.5% with a new local convenience store opening. Whilst the number and proportion of comparison goods fell in 2018, it has remained relatively stable since, recording a proportion of 31.2% at the time of the 2020 survey and still accounting for just under 1/3 of outlets within the CSA.

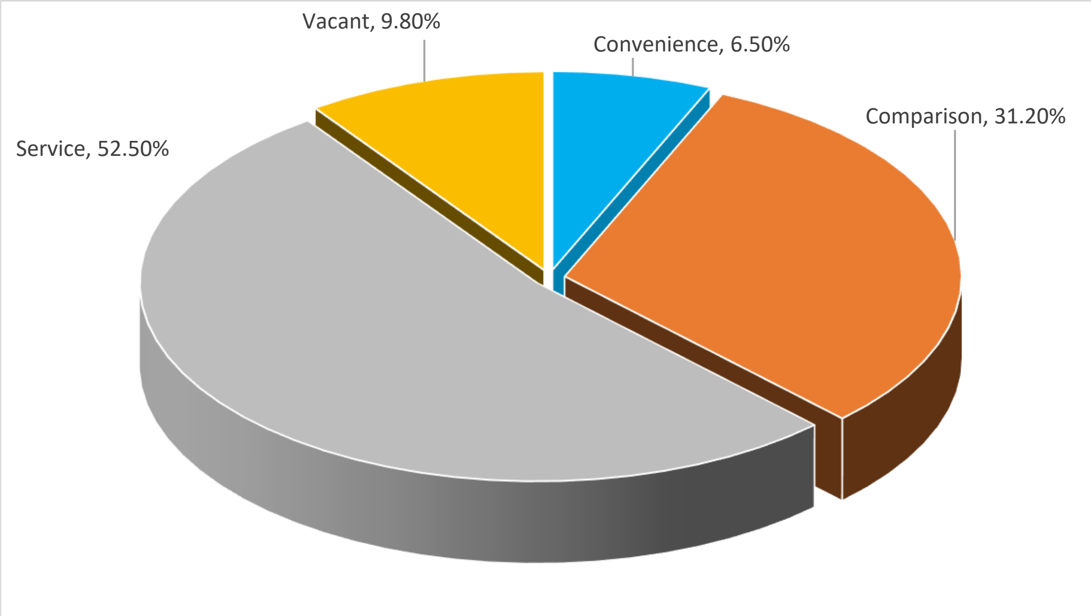
Figure 8.2 Number of Outlets within the CSA by Use Type over Time

Year	Comparison No.	Outlets %	Convenience No.	Outlets %	Service No.	Outlets %
2002	21	38.9	6	11	25	46.3
2005	21	35.6	6	10.2	24	40.7
2006	26	42.6	6	9.8	25	41.0
2008	24	38.1	5	7.9	27	42.9
2010	21	35.6	5	8.5	23	39.0
2012	21	35.6	6	10.2	27	45.8
2013	20	31.3	6	9.4	31	48.4
2014	21	32.8	6	9.4	32	50.0
2015	20	31.8	5	7.9	31	49.2
2016	22	36.1	4	6.6	27	44.3
2017	24	42.1	3	5.26	24	42.1

Year	Comparison No.	Outlets %	Convenience No.	Outlets %	Service No.	Outlets %
2018	19	33.3	3	5.26	26	45.6
2019	19	32.2	3	5	28	47.5
2020	19	31.2	4	6.5	32	52.5

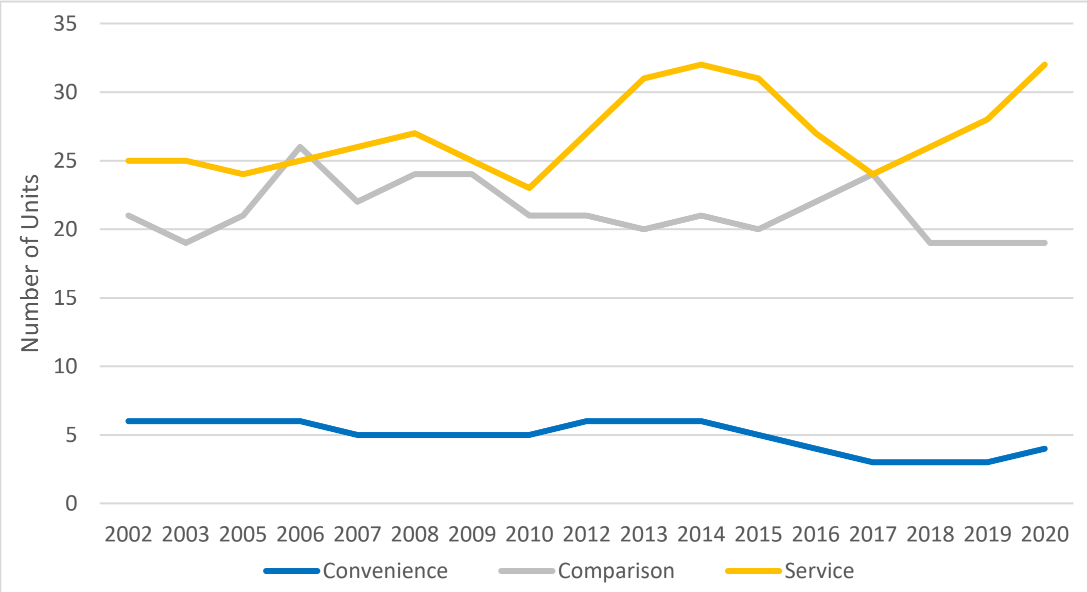
Note: Percentages include vacant units which are dealt with separately in section 8.5

Figure 8.3 Percentage of Outlets by Use Type within the CSA



8.3.2 Figure 8.4 illustrates outlet numbers and their fluctuation within the CSA over time. The 2018 survey was the start of an increasing difference between the number of comparison and service outlets, which has been exacerbated by the 2020 survey which recorded a sharp increase in the number of service outlets whilst the number of comparison outlets remained the same. The number of convenience outlets has remained relatively stable since 2015, and whilst lower than the number seen in the early 2010s, the 2020 survey has recorded a marginal increase in their number.

Figure 8.4 Comparison of the Number of Outlets within the CSA by Use Type over Time.



8.3.3 Figure 8.5 identifies and illustrates the diversity of uses within the town centre with respect to floorspace.

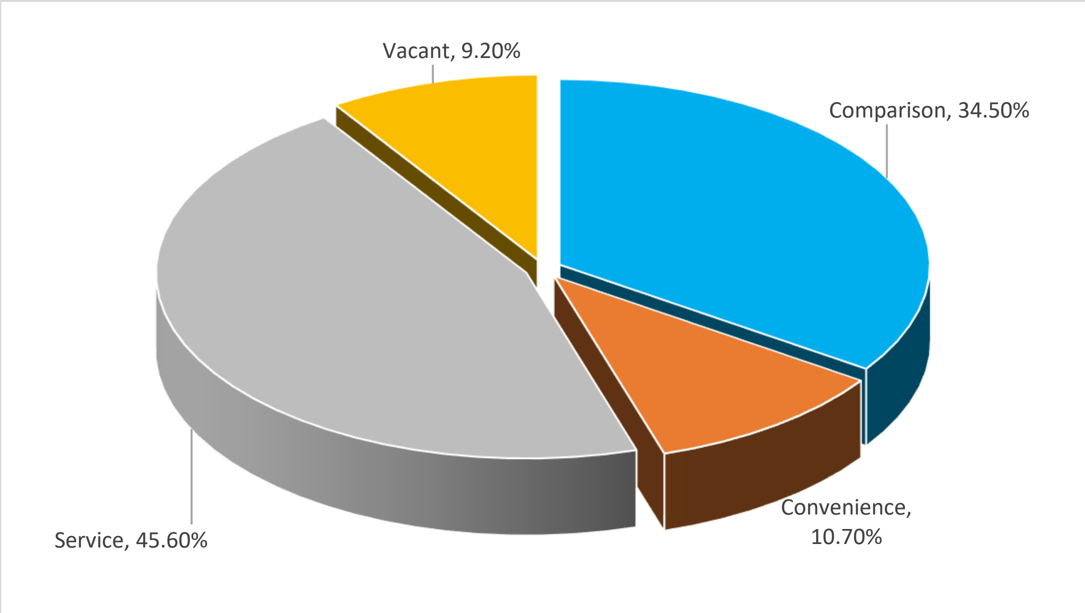
Figure 8.5 Percentage over Time of Floorspace Use within the CSA

Year	Comparison %	Convenience %	Service %
2002	42	15	41
2005	36	16	41
2006	44	18	35
2008	37	18	36
2010	37	18	33
2012	36	21	36
2013	34	21	35
2014	34	16	42
2015	31	15	43
2016	34	14	39
2017	37	14	36
2018	33	11	37
2019	37	11	39
2020	35	11	46

Note: Total and percentage figures include vacant units which are dealt with separately in section 8.5

8.3.4 Usk town centre as defined in the Adopted Local Development Plan has an estimated net retail floorspace of over 3,500m^2 within the CSA of which comparison outlets account for 35%, convenience 11% and service outlets 46%. The proportion of service floorspace has increased significantly since the previous survey in 2019 and now represents nearly half of the floorspace within the CSA. Usk is the highest of all towns surveyed, this reflects the changes discussed at paragraph 8.3.1 and Usk's position as an administrative and service centre for its surrounding rural hinterland.

Figure 8.6 Percentage of Floorspace Use by Retail Type



8.3.5 In addition to the retail and service uses, Usk contains a number of important non-retail uses within or adjacent to its town centre. Notable examples are the library, museum, religious and other community buildings, together with offices and residential properties.

8.4 Retailer Representation

8.4.1 As a small town centre Usk only has two national retailers, the Co-Operative and Parsons Bakery. The majority of retailers are locally owned family run businesses. A number of service outlets are represented, however, the 2018 survey recorded that the only remaining bank (Barclays) was vacant and this remains the case. Other services include several estate agents and a number of restaurants and cafes with several pubs. Usk also has a range of other services including, police and fire stations, a petrol station, prison and industrial estate.

8.5 Retailer Demand and Intentions to Change Representation

8.5.1 Current information on retailer demand and intentions to change representation in Usk is very limited, reflecting the size of the centre. The only significant change in recent years has been the replacement of the Spar with a Co-operative store and the closure of the Nat West, HSBC and Barclays banks. Encouragingly the 2020 survey recorded that 2 new microbreweries and pubs had established themselves along with a new beauty salon and florist.

8.6 Vacancies

8.6.1 The number of vacant outlets within the town centre is often a useful barometer of the health of that town centre and how it is trading. However national planning policy advises that whilst vacancy rates are a useful guide for measuring vitality and viability, vacancies can arise in the strongest of centres.

Figure 8.7 Number of Vacant Units over Time within the CSA

Year	Number of Vacant Units	% Overall Vacancy Rate
2002	2	3.7
2003	5	9.1
2005	8	13.6
2006	4	6.6
2007	9	14.5
2008	7	11.1
2009	6	10
2010	10	16.9
2012	5	8.5
2013	7	10.9
2014	5	7.8
2015	7	11.1
2016	8	13.1
2017	6	10.3
2018	9	15.9
2019	9	15.3
2020	6	9.8

8.6.2 Figure 8.7 illustrates the number of vacant units as well as overall vacancy rates over time for Usk. At the time of the most recent survey there were 6 vacant outlets accounting for 9.8% of all outlets within CSA.

8.6.3 Encouragingly, the number of vacant units and the overall vacancy rate has decreased in the 2020 survey and are the lowest recorded since 2014. Whilst the 2014 survey recorded a lower number of vacant units and overall vacancy rate, it is encouraging to see vacancy decreasing. In 2020, of all the towns surveyed, Usk was the only one to have seen a fall in its vacancy rate. Whilst this is encouraging, there are some units which remain vacant and have been vacant for a sustained period of time including what was Barclays Bank and HSBC.

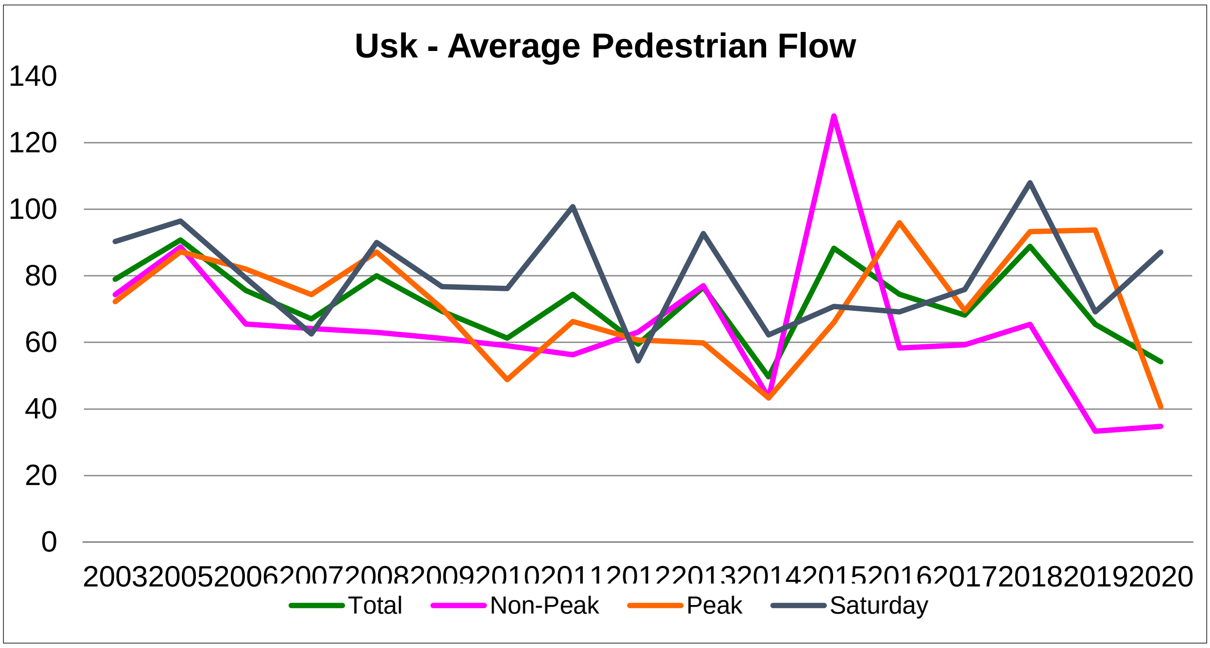
8.7 Pedestrian Flows

8.7.1 One element of the retail surveys is a pedestrian flow count which is conducted at several strategic locations throughout the town; Bridge Street, adjacent to the police station, the Co-operative, unit which was previously Barclays Bank, Castle Parade, Four Ash Street, Priory Street and outside the Three Salmons Hotel.

8.7.2 There has been a lot of fluctuation especially since 2012 in all average footfall flows within Usk. The numbers of pedestrians in Usk is comparatively lower than in other settlements within Monmouthshire where the overall average footfall has declined since 2018. In 2020 whilst the overall flow fell, both the non-peak flow and the Saturday flow increased, and the latter by a significant amount. However the peak flow in 2020 was at its lowest on record, which may be influenced by the pandemic.

8.7.3 The highest pedestrian flows were recorded outside the Co-operative due to its central position at the main entrance to Bridge Street and the location of the nearby car park on Maryport Street. Bridge Street also recorded a noticeably high count on the Saturday in 2020 as well. The fluctuation seen in the pedestrian flows since 2012 are potentially not as pronounced as they appear in figure 8.8. Usk town centre and population is smaller than that of market towns such as Abergavenny, and this must be taken into account when interpreting the graph below.

Figure 8.8 Average Pedestrian Flow Rates over Time



8.8 Accessibility

8.8.1 Accessibility is a fundamental element of an attractive, viable and thriving town centre and has several indicators including public transport links, car parking provision and pedestrian and cycling networks.

8.8.2 Both business performance and transport modal split can be influenced by the quantity and cost of parking provision. Despite its size, Usk is well provided for in terms of parking with 152 spaces in two separate locations in the immediate vicinity of the CSA including 10 disabled bays. Maryport Street (North, and Twyn Square, and further unlined parking on Maryport Street (South), are not subject to charging and appear to be popular and well used.

8.8.3 Usk is well served by public transport with bus services passing through the town serving Monmouth, Abergavenny, Pontypool, Chepstow and Newport.

8.8.4 Equally, Usk's position within easy reach of the A449 (T) also ensures good road links to Newport, Monmouth, Abergavenny and beyond, for car users.

8.8.5 Cycle links with the town are good with 2 National Cycle routes passing through the town.

8.8.6 In terms of pedestrians, the centre has a relatively compact but linear nature, with the majority of retail outlets on Bridge Street. However, as this is the major vehicular route through the town the environment for pedestrians is poor.

8.9 Environmental Quality

8.9.1 The whole of Usk's CSA falls within a designated conservation area. The town retains an historic appearance with many older buildings and a generally high environmental quality. The shopping street itself is the main thoroughfare through the town which leads to conflict between pedestrians and traffic, and Bridge Street; from Twyn square to the bridge, is a designated Air Quality Management Area.

8.10 Household Survey

8.10.1 The Council have conducted a series of household surveys over the past 20 years looking at the shopping patterns of people living in our main towns. The first survey was undertaken in 1997, this was then repeated in 2006 and then again in 2009 as part of a larger Retail and Leisure Study which was undertaken as a background study for the Local Development Plan, the latest survey was conducted in November 2015.

8.10.2 In November 2015; 1,005 telephone interviews were carried out within six identified zones based on the County's main retail centres and constructed to reflect the sphere of influence of each centre. A series of questions were asked in an attempt to establish the trade draw of the Counties central shopping areas. The key questions asked concerned the location of the households' main food shop, the location of any top-up convenience shopping and where local residents shop for a variety of comparison goods.

8.10.3 All of the household surveys which have been undertaken to feed into the Retail Background Paper follow a broadly similar methodology so that whilst they do not allow for an exact comparison they do give some indication, over time, of changing shopping habits.

Figure 8.9 Main Convenience Shopping Outlet

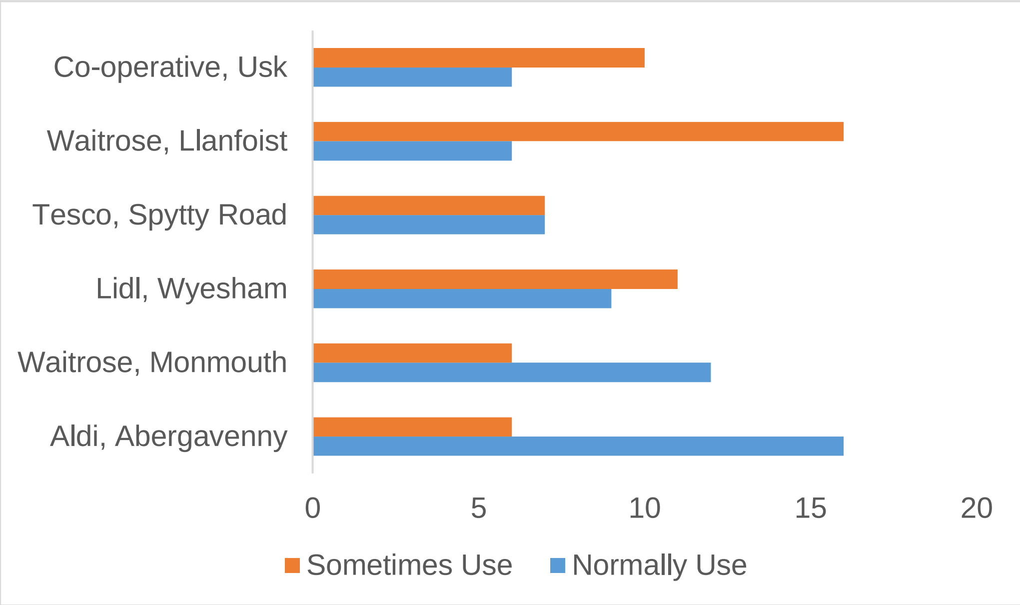
Outlet (%)	1997	2006	2009	2015
Co-operative, Usk (Spar)	7	14	6	6
Waitrose, Monmouth	10	11	12	12
Safeway, Abergavenny	6	-	-	-
Waitrose (Llanfoist) (Safeway – 1997)	4	6	9	6
Aldi, Abergavenny	-	-	-	16
Lidl, Wyesham	-	-	-	9
Nisa, Raglan	1	3	7	1
Other Monmouthshire	13	12	11	3
Outside County	59	53	55	44
Newport	28	13	12	20
Cwmbran	26	29	31	7
Pontypool	1	8	7	7
Internet	-	1	-	6

8.10.4 Of those interviewed for the 2015 survey three quarters do their main food shopping once a week or more often, for the Usk zone it is slightly less with about 68% of respondents doing their main food shopping once a week or more often.

8.10.5 With no large supermarket locally few of the respondents in the Usk Zone said they did their main convenience shop in the town, with the majority of respondents in past surveys going out of the County, primarily to shops in Newport and Cwmbran. At the time of the latest survey, however, the percentage going out of County has dropped with a quarter of respondents choosing to shop in the Aldi in Abergavenny or the Lidl in Wyesham. The rise in the popularity of this type of store mirrors a national trend.

8.10.6 In terms of the stores that the respondents visited for their main food shop, it is noticeable that due to the lack of a large supermarket within the town itself respondents are not tending to favour a particular store, although more people are travelling to Abergavenny for their main food shop than elsewhere.

Figure 8.10 Stores Visited for Main Food Shop



8.10.7 In contrast to the responses for the main convenience shop, the majority of those interviewed in the Usk zone (59%) said they do their top-up convenience shopping within the town, with a further 26% doing their top-up shop in Raglan, although this is likely to be those respondents living in that area. The percentage of interviewees who do their top-up shop at local stores shows the continuing importance of neighbourhood centres.

Figure 8.11 Top up Convenience Shopping Outlet

Outlet (%)	1997	2006	2009	2015
Co-operative, Usk (Spar)	40	59	57	43
Local Shops	18	9	3	16
Nisa, Raglan	15	17	19	26
Other Monmouthshire	16	8	11	15
Outside County	11	7	10	-
Cwmbran	3	5	2	-
Newport	3	1	-	-

8.10.8 The table below shows the percentage of those interviewed in the Usk Zone regarding their preferred locations for buying a range of comparison goods, of those shopping for these items outside of the County the other most popular destinations are shown. It can be seen from this that the majority of respondents are doing their comparison shopping either on line or at centres outside of the County. For Usk the main trade draws away from the town for comparison goods are Cardiff and Cwmbran.

Figure 8.12 Comparison Shopping

%	Usk	Other Mon'shire	Internet	Outside County/Other
1st choice clothes, footwear and other fashion goods	2	0	19	79 1. Cardiff - 30% 2. Cwmbran – 22% 3. Newport – 21%
2nd choice clothes, footwear and other fashion goods	0	16	5	79 1. Bristol Cribbs Causeway – 26% 2. Cardiff – 16% 3. Newport – 16%
Books, music, DVDs and toys	2	6	64	28 1. Cardiff – 6% Cwmbran – 5%
Chemist goods, toiletries and cosmetics	28	15	7	50 1.Cwmbran – 18% 2. Cardiff – 11%
Furniture, carpets and soft furnishings	0	5	17	78 1. Cardiff – 29% 2. Bristol – 12% 3. Newport 12%
Household goods, glass, china and tableware	0	7	10	83 Cardiff – 33% 2. Bristol – 15% Cwmbran – 13% Newport – 13%
Electrical goods	0	1	44	55 1.Cwmbran – 14% 2. Cardiff – 14% 3. Newport – 11%
DIY, hardware and gardening goods	18	12	16	42 1. Cwmbran – 24% 2. Newport – 12%
Banking, financial and legal services	30	29	35	6 1. Cwmbran – 4%

8.10.9 In some sectors significant numbers of respondents are shopping on-line, this is particularly noticeable for books, music, DVDs and toys, electrical goods and banking and finance.

8.10.10 As well as looking at the retail offer of the main towns, the survey also asked respondents about their choice of location for various leisure activities. Of those in the Usk catchment area who said they visited the cinema, 48% said they usually went to the Cineworld in Newport, with 28% using the Vue Cinema in Cwmbran and 12% the Vue Cinema in Cribbs Causeway, Bristol.

8.10.11 Respondents were also asked which gym or sports/leisure centre they usually used, over half of those who use this type of facility said they used one of the County's Leisure centres, showing the importance of locally available facilities.

8.10.12 In terms of the respondents use of museums, art galleries and theatres people tended to travel further afield for these when they used them. For those in the Usk catchment area who normally visit these, 45% would go to Cardiff to visit a museum, 34% would go to London to visit an art gallery and 58% would go to Cardiff for the theatre. Although the presence of local theatres in Abergavenny and Monmouth means that 12% of respondents would visit one of these theatres.

8.11 Future Retail Development

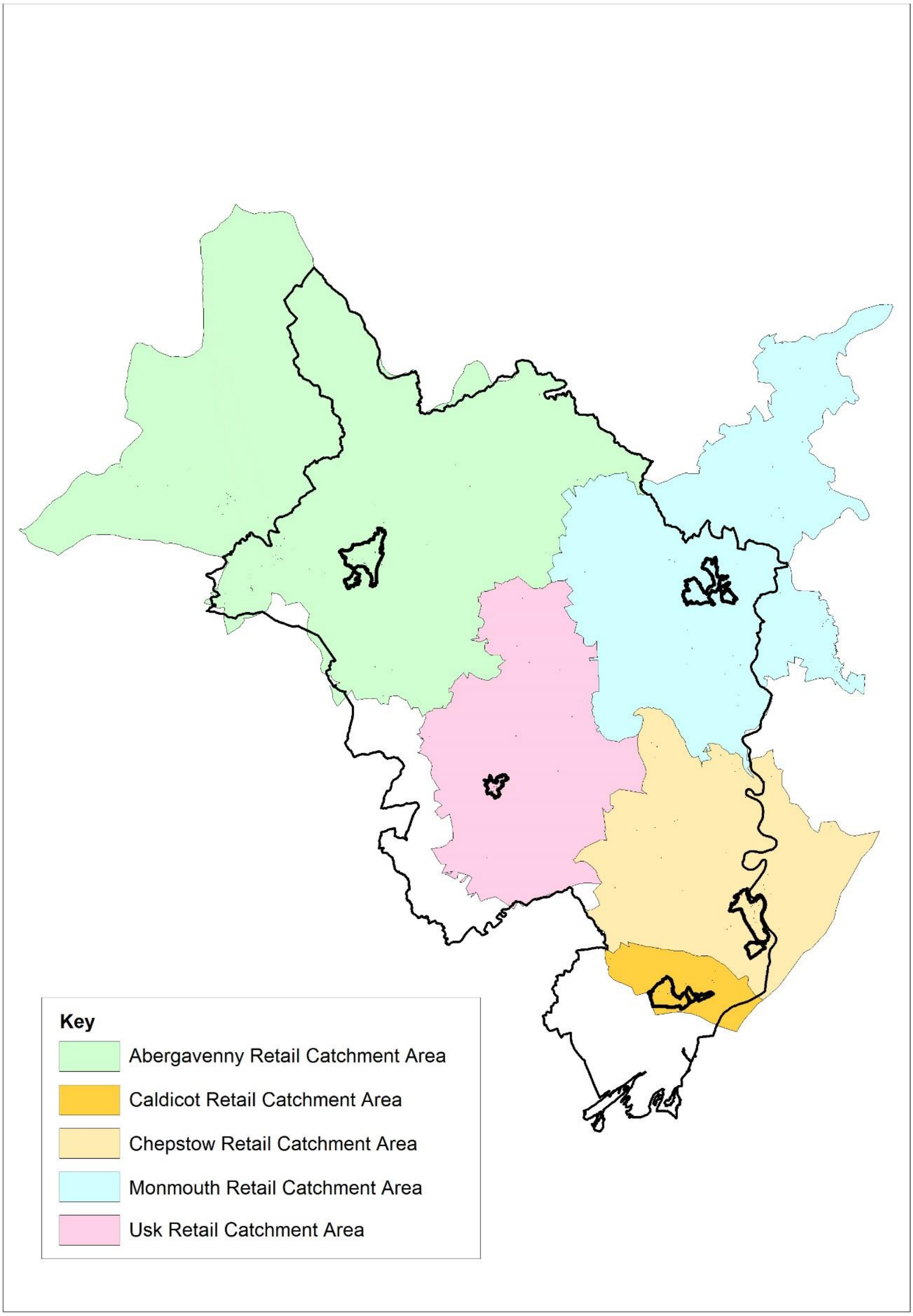
8.11.1 At the time of writing this report there were no proposed new retail developments with either outline or full planning permission within the town of Usk.

Reference Documents

Adopted Monmouthshire Local Development Plan, February 2014
Primary Shopping Frontages Supplementary Planning Guidance, April 2016, Monmouthshire County Council
Monmouthshire Retail & Leisure Study, April 2010, Drivers Jonas Deloitte on behalf of Monmouthshire County Council
Retail Footfall and Consumer Shopping Habits Survey, Beaufort Research, January 2016
Retail Background Paper, 2015, Monmouthshire County Council

Welsh Government Planning Policy Wales, Edition 11 February 2021
Welsh Government Technical Advice Note 4: Retail and Commercial Development, November 2016

Appendix A – Retail Catchment Areas

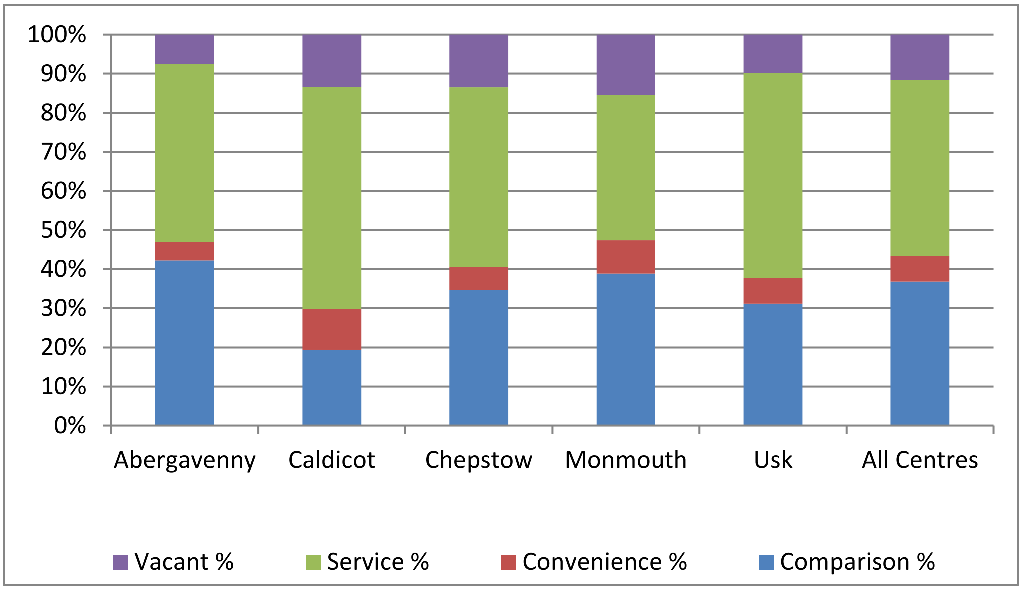


Appendix B – Paycheck Data

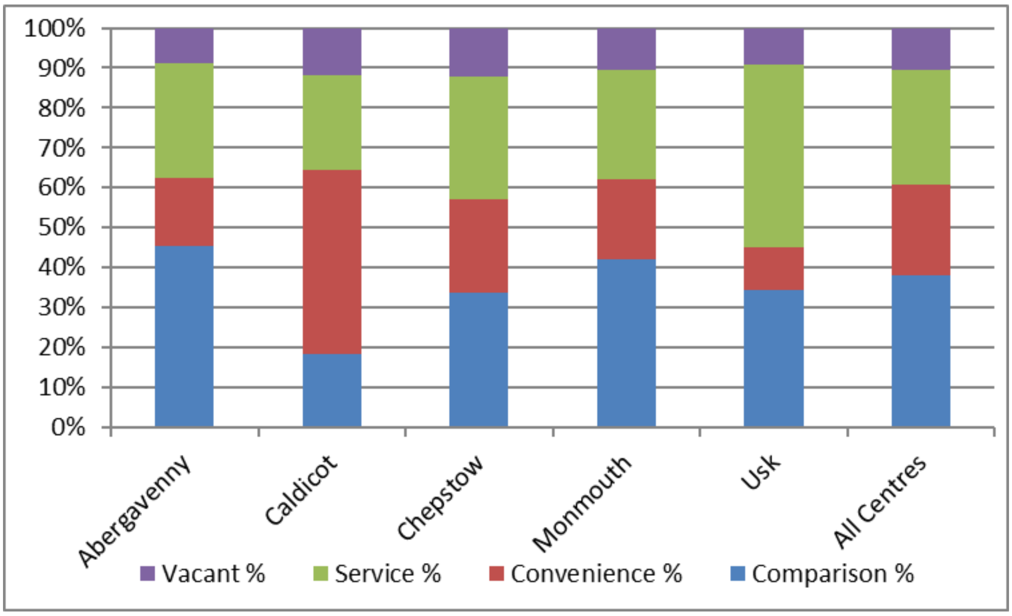
	Mean Income	**% Households below 50% of GB Median Income**	**% Households below 60% of GB Median Income**
Abergavenny	£42,694	18	24
Caldicot	£42,691	18	25
Chepstow	£47,723	15	20
Monmouth	£43,609	18	24
Usk	£47,797	15	20
Monmouthshire	£45,193	17	22
Wales	£36,234	25	33
GB	£41,293		

Appendix C – Comparison of survey results of main towns

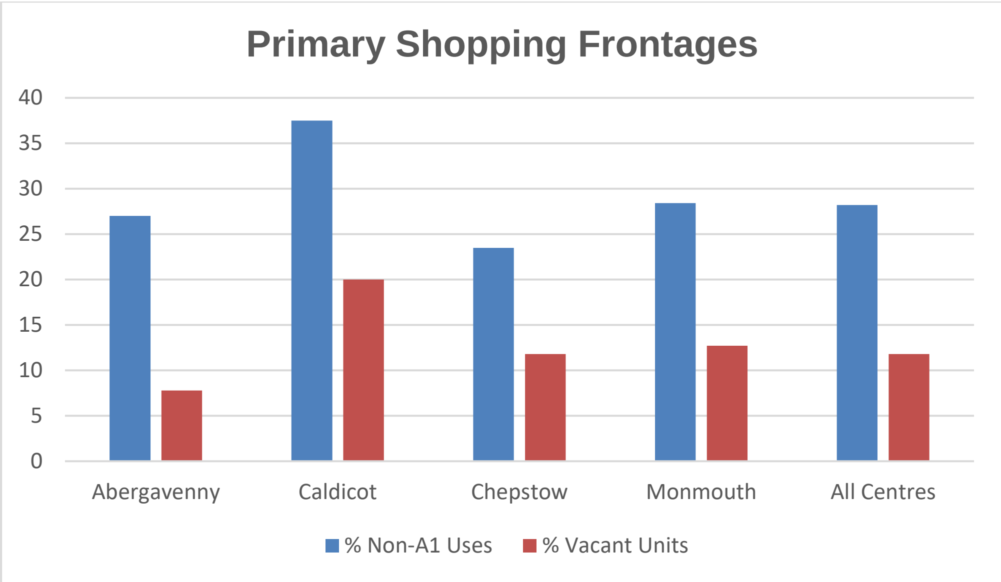
Retail Use - 2020



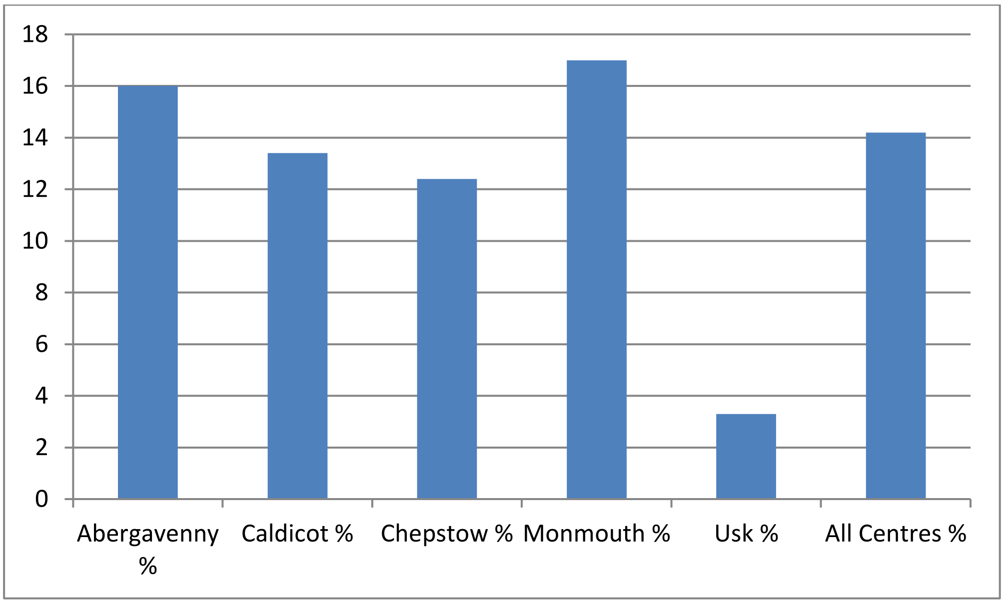
Retail Use – Floorspace - 2020



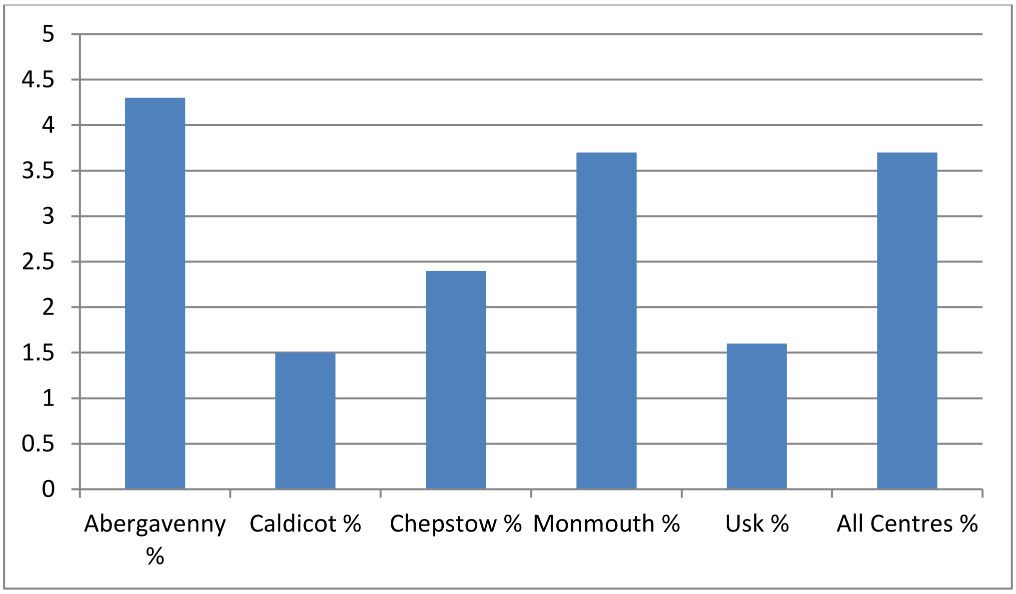
% Non-A1 uses and Vacant Units in Primary Shopping Frontages - 2020



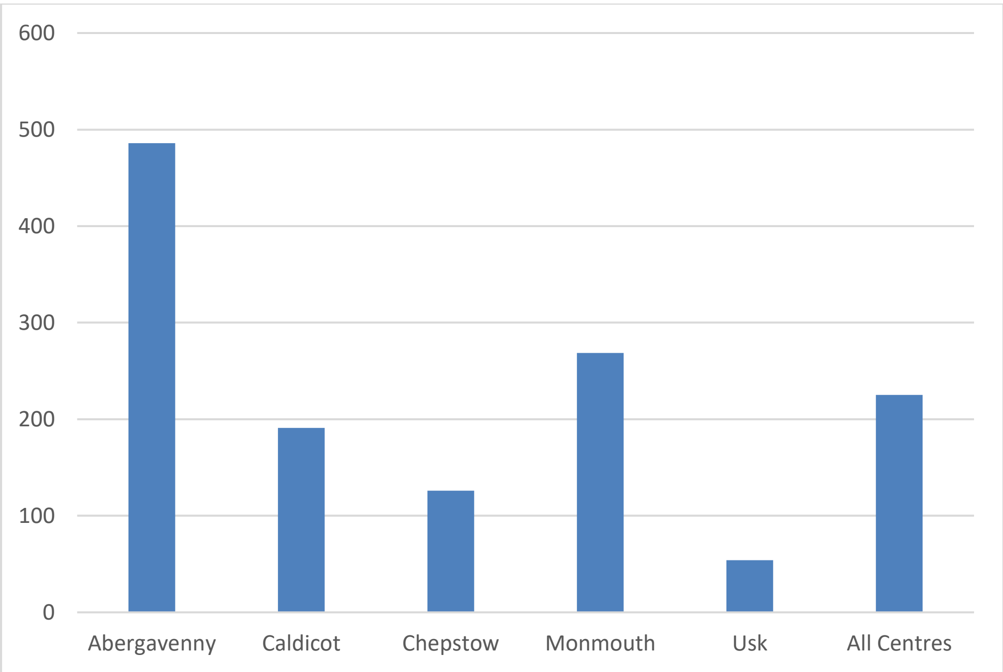
Representation of National Retailers in all Units within the CSA - 2020



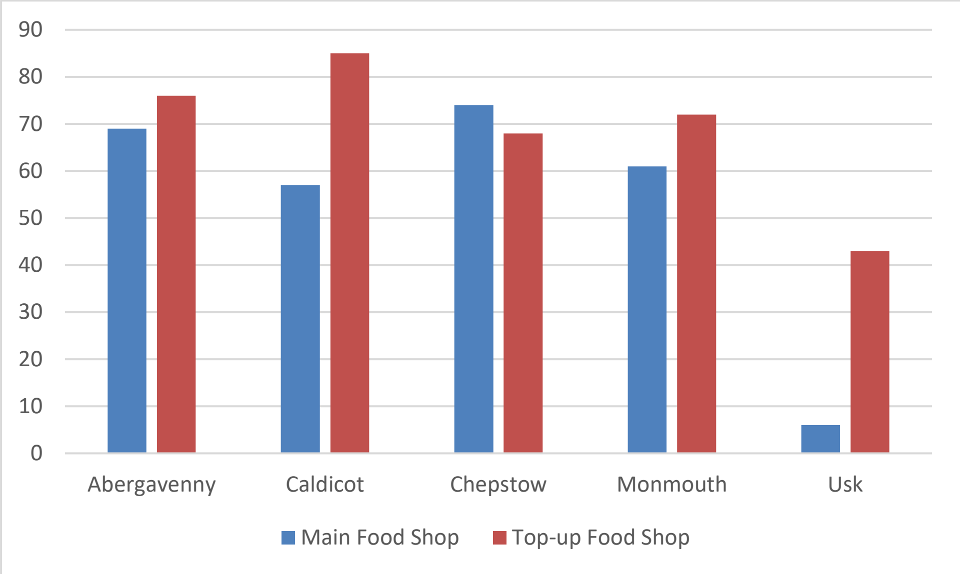
Representation of Charity Shops - 2020



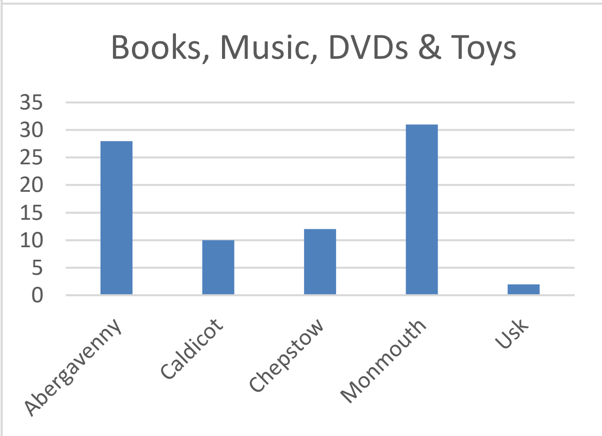
Average hourly footfall – 2020

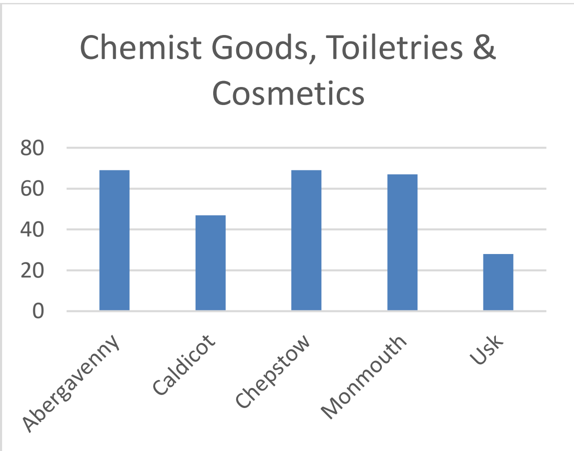


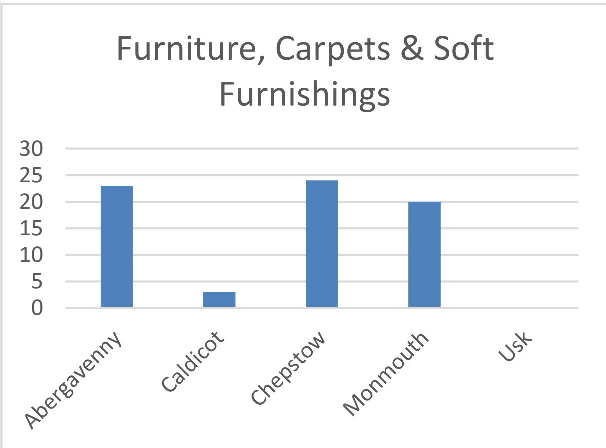
Trade Retention by Town for Convenience Shopping (%)

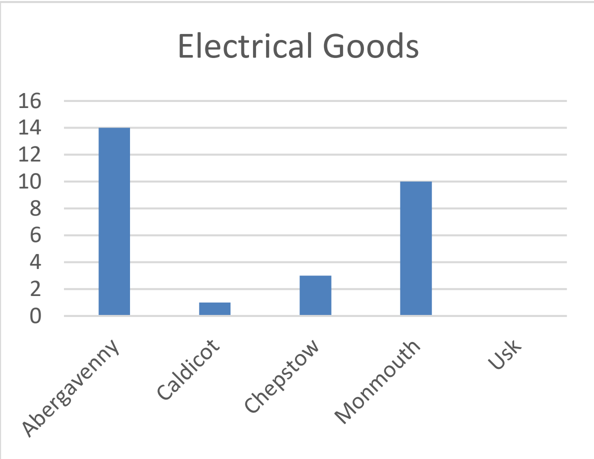


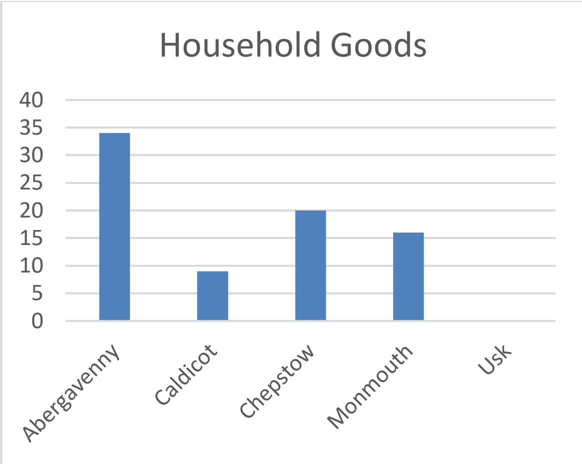
Trade Retention by Town for Comparison Shopping (%)

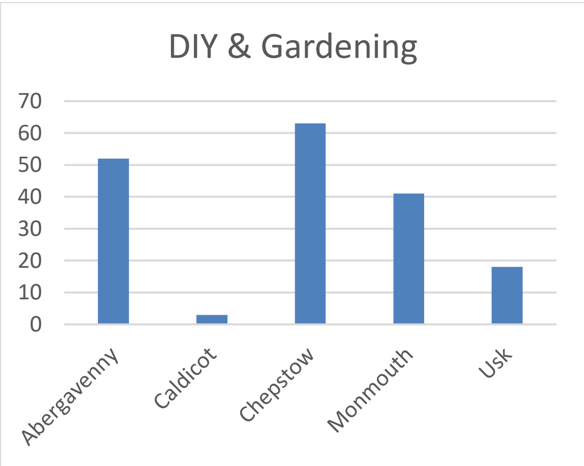


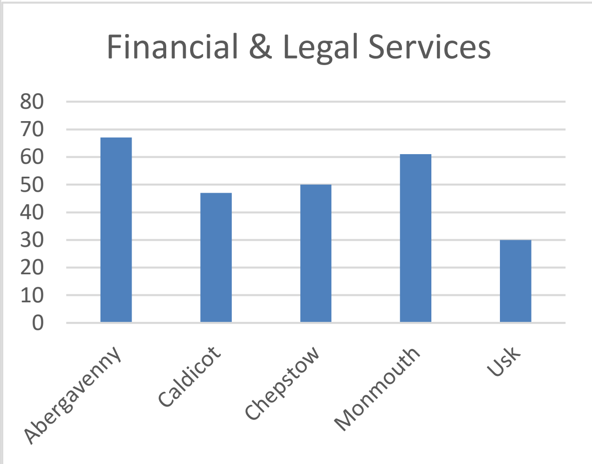





Electrical Goods
16
14
12
10
8
6
4
2
0
Abergavenny
Caldicot
Chepstow
Monmouth
Usk

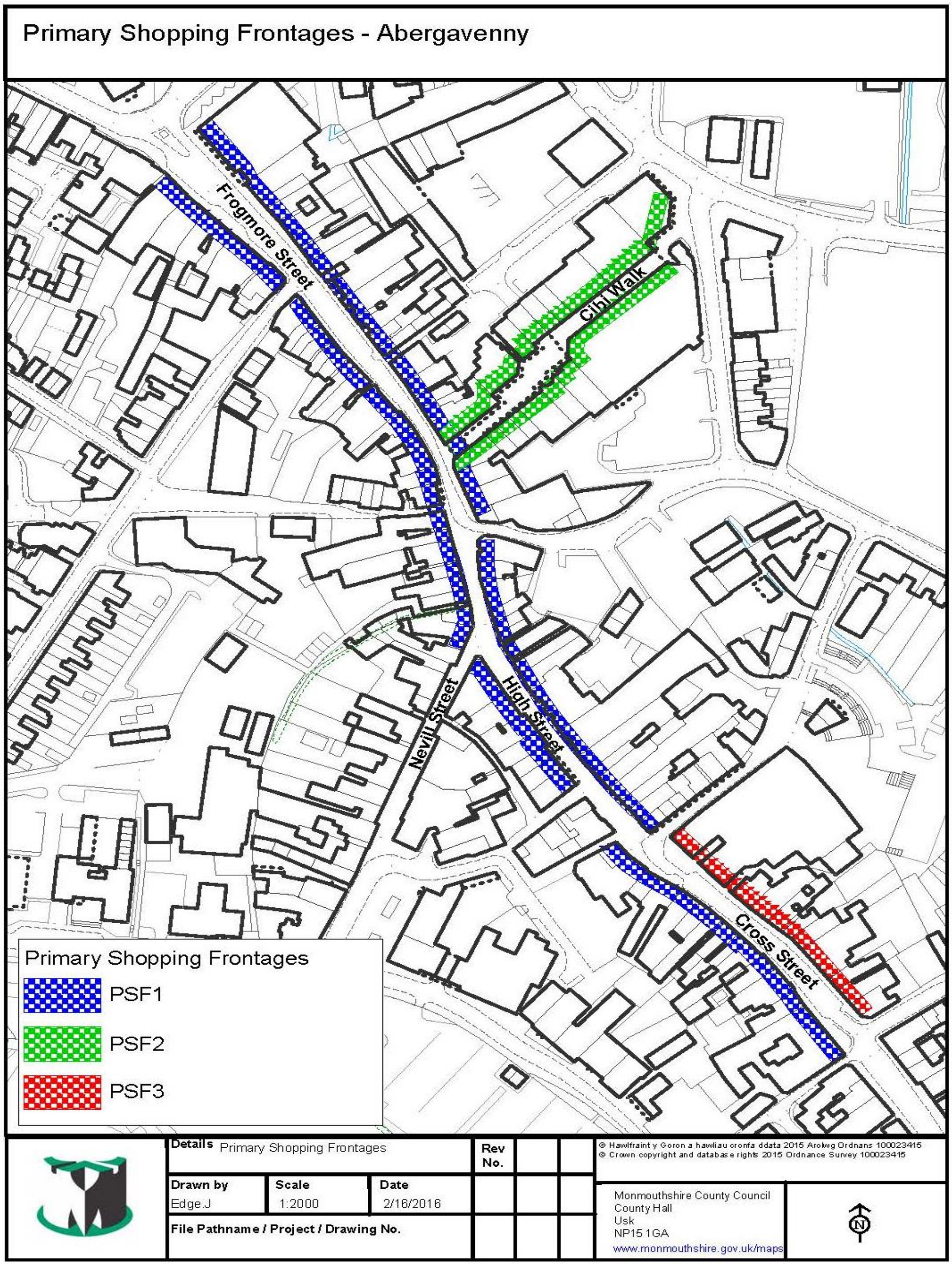

Household Goods
40
35
30
25
20
15
10
5
0
Abergavenny
Caldicot
Chepstow
Monmouth
Usk


DIY & Gardening
70
60
50
40
30
20
10
0
Abergavenny
Caldicot
Chepstow
Monmouth
Usk


Financial & Legal Services
80
70
60
50
40
30
20
10
0
Abergavenny
Caldicot
Chepstow
Monmouth
Usk

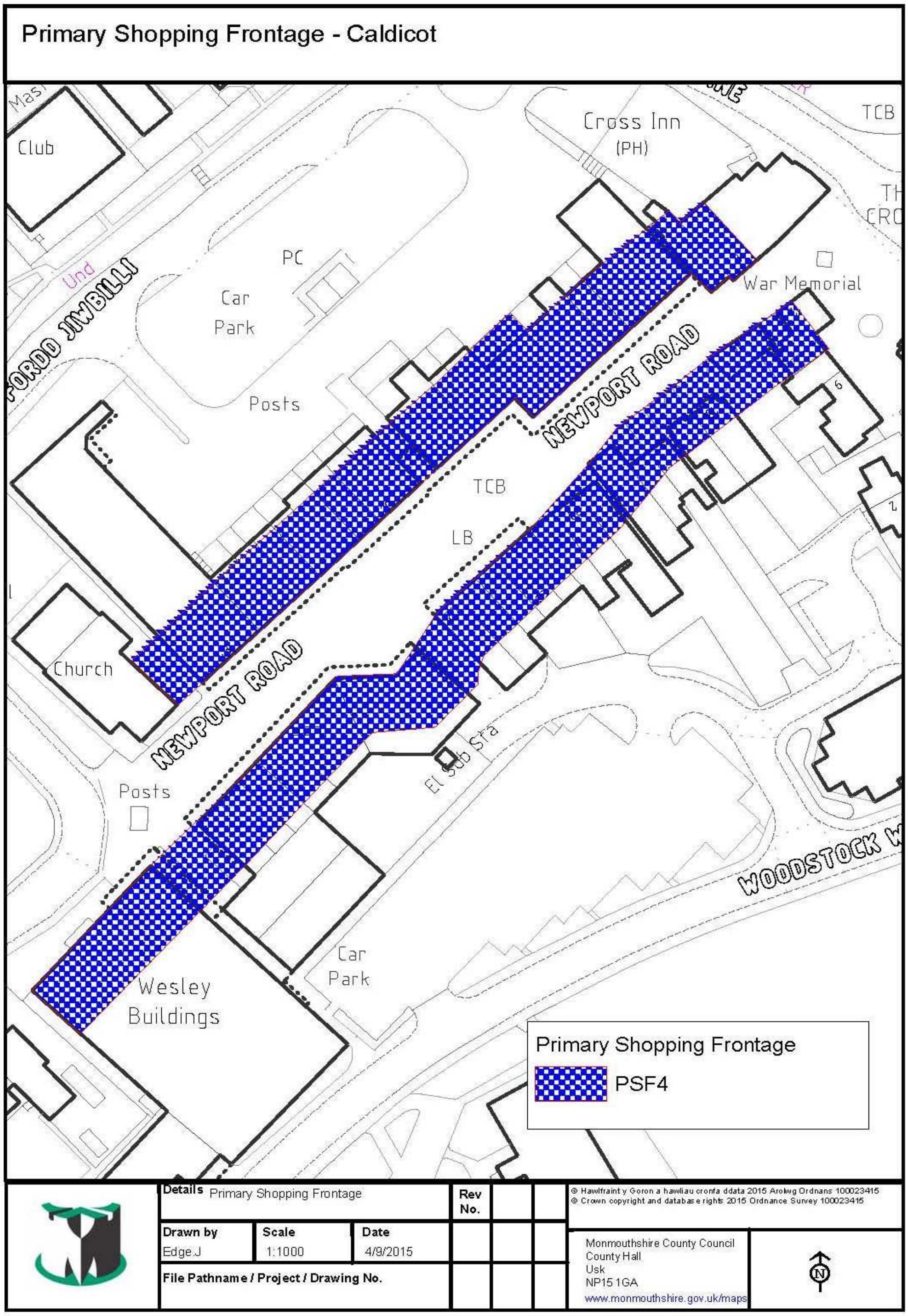
Appendix D: SPG Primary Shopping Frontages and Maximum Thresholds for Non-A1 Uses

Abergavenny



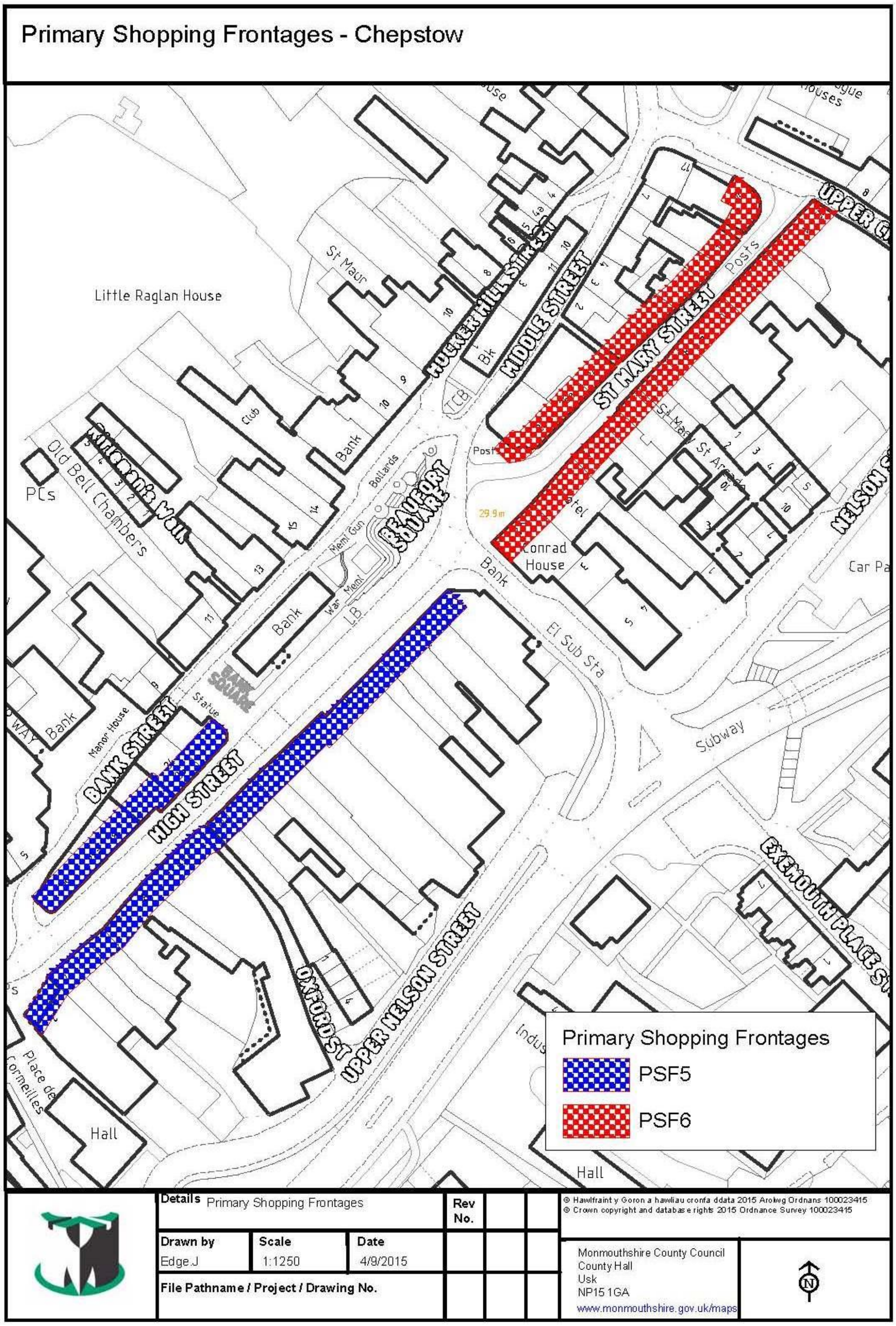
Primary Shopping Frontage		Maximum % of Non-A1 Units
PSF1	Cross Street, High Street & Frogmore Street	25%
PSF2	Cibi Walk	0%
PSF3	Cross Street (51-60 & Town Hall)	45%

Caldicot



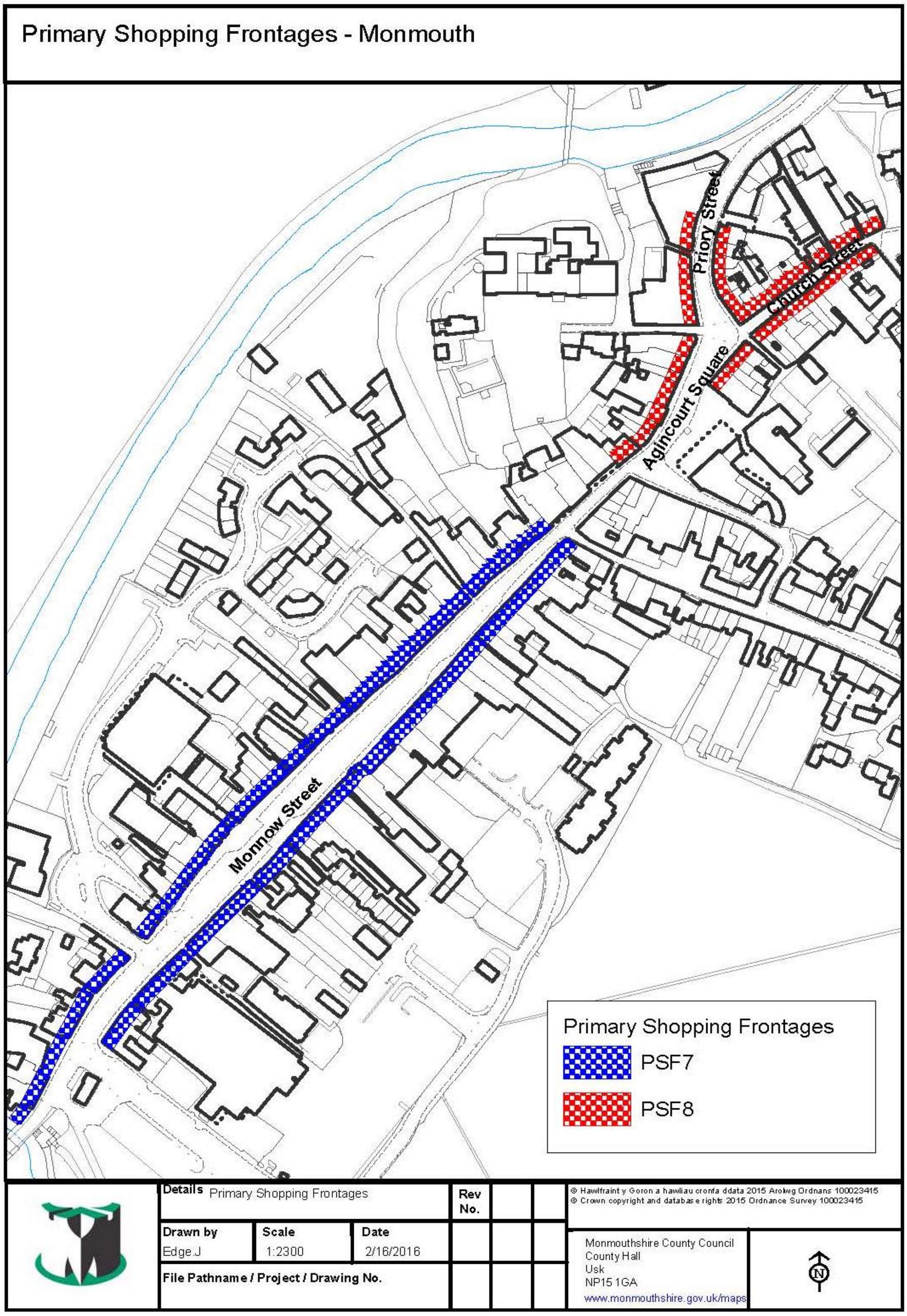
Primary Shopping Frontage		Maximum % of Non-A1 Units
PSF4	Newport Road (7-43 & 14-Wesley Buildings)	35%

Chepstow



Primary Shopping Frontage		**Maximum % of Non-A1 Units**
PSF5	High Street (2-29)	25%
PSF6	St Mary Street	35%

Monmouth



Primary Shopping Frontage		Maximum % of Non-A1 Units
PSF7	Monnow Street (12-126)	25%
PSF8	Church Street, Agincourt Square & Priory Street (1-4)	35%