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Monmouthshire Local Development Plan

2021

RETAIL BACKGROUND PAPER

August 2022

**Monmouthshire County Council
Local Development Plan**

**2021 Retail Background Paper
August 2022**

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Appendix B: Paycheck Data

Appendix C: Comparison of survey results of main towns

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

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 2021.
- 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 2021 town centres across the UK have continued to be 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 2020) acknowledges this. In Monmouthshire, the impact of lockdown restrictions throughout 2020 and 2021 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. The 2021 survey results indicate that retail centres in Monmouthshire have begun to recover with increased overall footfall in all centres and lower vacancy rates in all centres with the exception of Monmouth, where there was a very marginal increase. Equally encouraging is that several vacant premises in the 2020 survey were occupied at the time of the 2021 survey. The on-going impact of the pandemic will continue to be monitored through future reports.
- 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 November 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 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

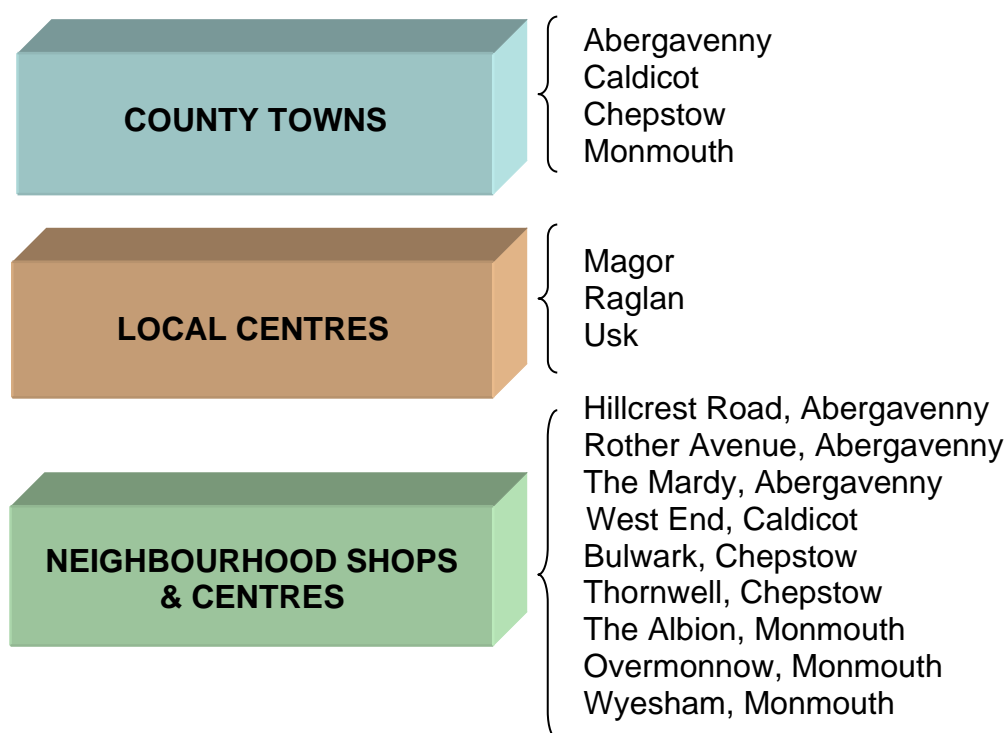
2.7.1 This includes information on air quality, noise, trees, landscaping, open spaces, litter and graffiti, where available.

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 25 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 survey was undertaken again 2015 and most recently in early 2022. 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.



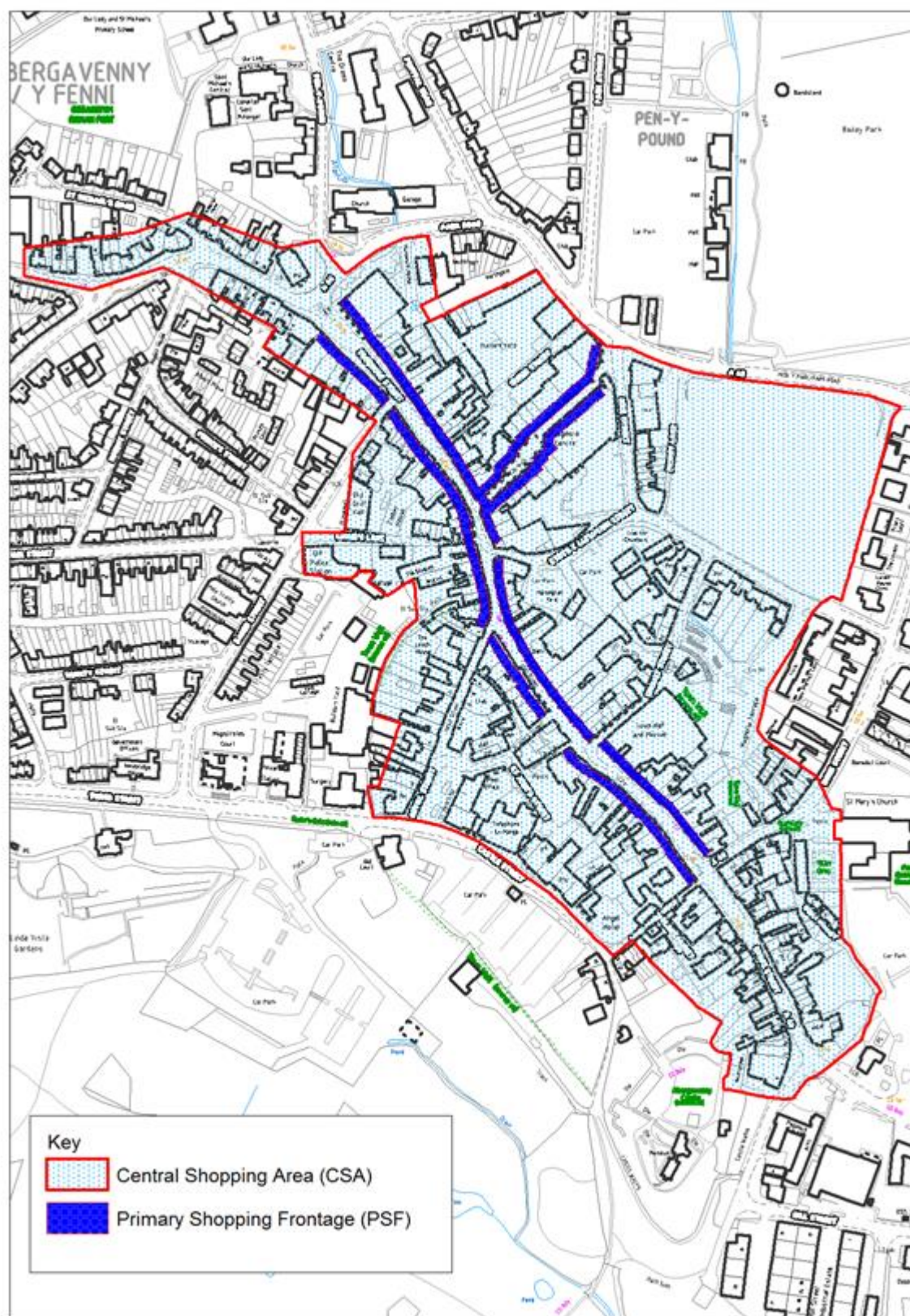
- 3.3 Within Monmouthshire there are four principal County Towns, namely Caldicot and the three traditional market towns of Abergavenny, Chepstow and Monmouth. These towns provide a broad range of facilities and services associated with a traditional town centre and serve an area beyond the immediate 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 northwest 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 2021 was £40,924, relative to £43,266 for the county as a whole, and £34,700 for Wales. Out of the households in the Abergavenny catchment area, 18.7% are below 50% of the median income for the UK, and 25.3% below 60%. This compares to 17.3% and 23.4% respectively for Monmouthshire, and 26.1% and 34% for Wales as a whole (Appendix B).

4.3 Diversity of Uses

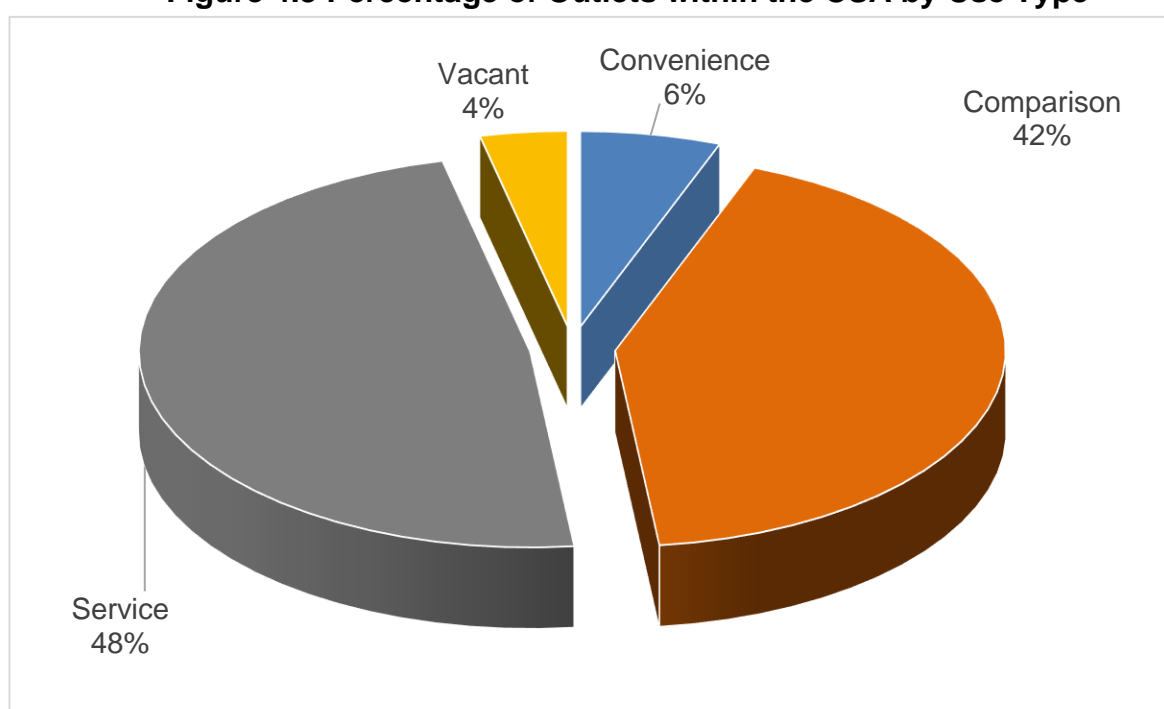
- 4.3.1 The 2021 retail survey demonstrated that comparison goods outlets accounted for 42.4% of Abergavenny town centre's retail and service uses. This proportion is comparatively low in relation to the period 2010 – 2019, however, it represents a marginal increase since the last survey, which recorded the lowest proportion on record. The proportion of service uses within the CSA has increased significantly since the early 2000s and they now account for 48.2% of outlets in the Abergavenny CSA, 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 5.8%. The opening of Morrison's on the old Cattle market site has helped maintain this proportion. The 2021 survey recorded three additional convenience outlets including a bakery and an independent refill, self-serve store.

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
2021	117	42.4	16	5.8	133	48.2

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

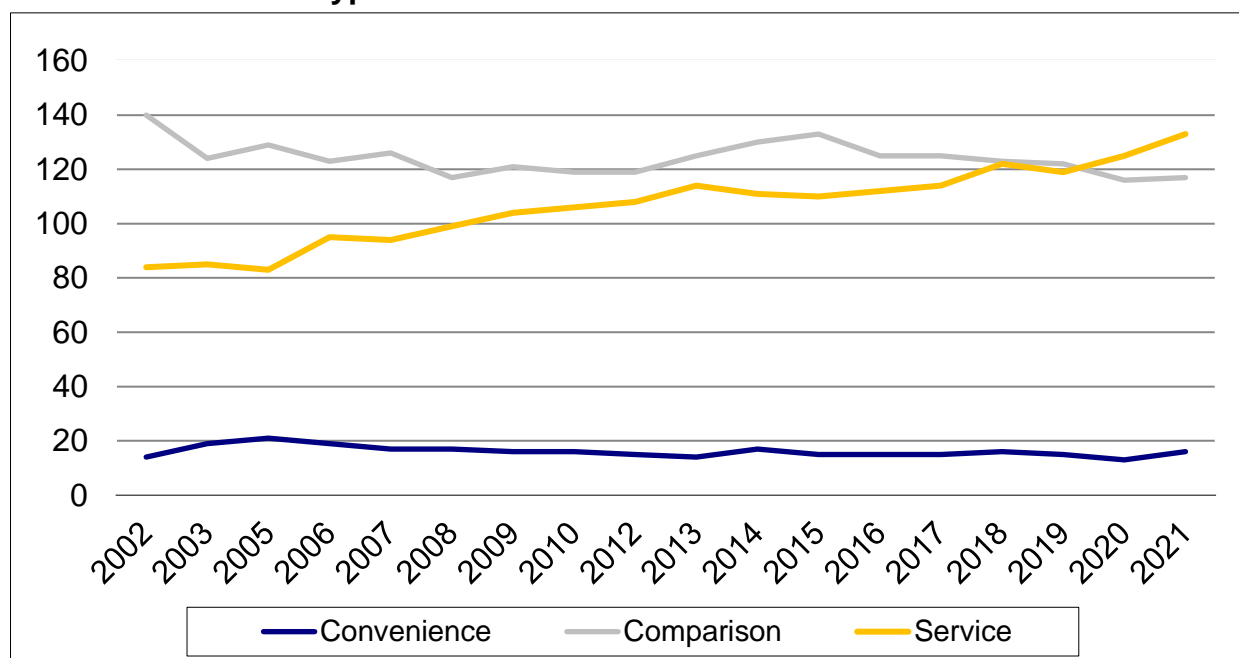
Figure 4.3 Percentage of Outlets within the CSA by Use Type



4.3.2 The results of the 2021 survey continue the trend in the increasing number of service outlets in the Abergavenny CSA since the early 2000s. In comparison, whilst the number and proportion of convenience and comparison outlets have increased marginally, their proportions are lower than that of the service outlets and Figure 4.4 indicates a trend of decline in both comparison and convenience outlets since the early 2000s. Planning Policy Wales Edition 11 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 57.3% of outlets in the Primary Shopping Frontage, this compares to 34.6% in the Secondary Shopping Frontage. In terms of service outlets, they only account for 35.4% of outlets in the Primary Shopping Frontage compared to 60.3% 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



4.3.3 Figure 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

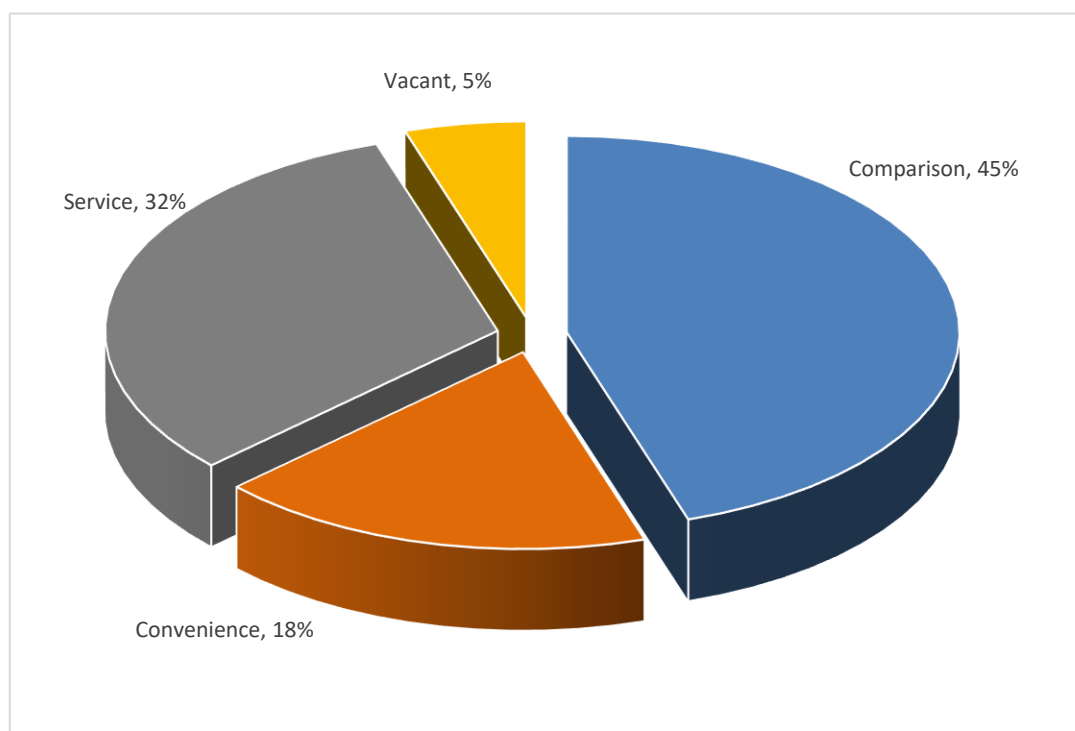
2015	48	11	34
2016	50	11	32
2017	53	12	31
2018	47	19	29
2019	47	17	28
2020	45	17	29
2021	45	18	32

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 approximately 29,700m² in 2021 of which nearly half is occupied by comparison goods outlets. Service uses account for the next largest proportion at nearly one third of retail floorspace at 32%, with convenience goods outlets accounting for 18% 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 42.4% of units in the CSA, however, they account for 45% of net retail floorspace. In contrast service outlets account for 48.2% of all units and only 32% 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, 18% 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 Town 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 m²), Bailey's DIY on Brecon Road (814 m²) and an edge of centre Aldi store (860m²). At the time of writing planning permission had been granted for the extension of the Aldi store and associated car park.
- 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 Trespass Clothing 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 (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 as well as two independent bakeries. 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 43 national retailers, which represent 15.6% 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 Edinburgh Woollen Mill has closed. Since 2010 there has been a net decrease in the number of national retailers of 6 and since 2017 there has been a downward trend, however, the number of chain cafes including Café Nero, Costa Coffee and Coffi Lab has grown since 2010. Whilst Coffee#1 had closed at the time of the previous survey, there are 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	2021
No. of Outlets	49	47	48	48	47	50	47	48	44	43

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 13 accounting for 11% of comparison goods outlets. This is one more than the 2020 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. The application to extend the Aldi store on the A40 referred to in the previous survey was granted planning permission in October 2021. The progress of this application will be monitored through future reports. 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 Waterstones Book Shop, and Mountain Warehouse 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.

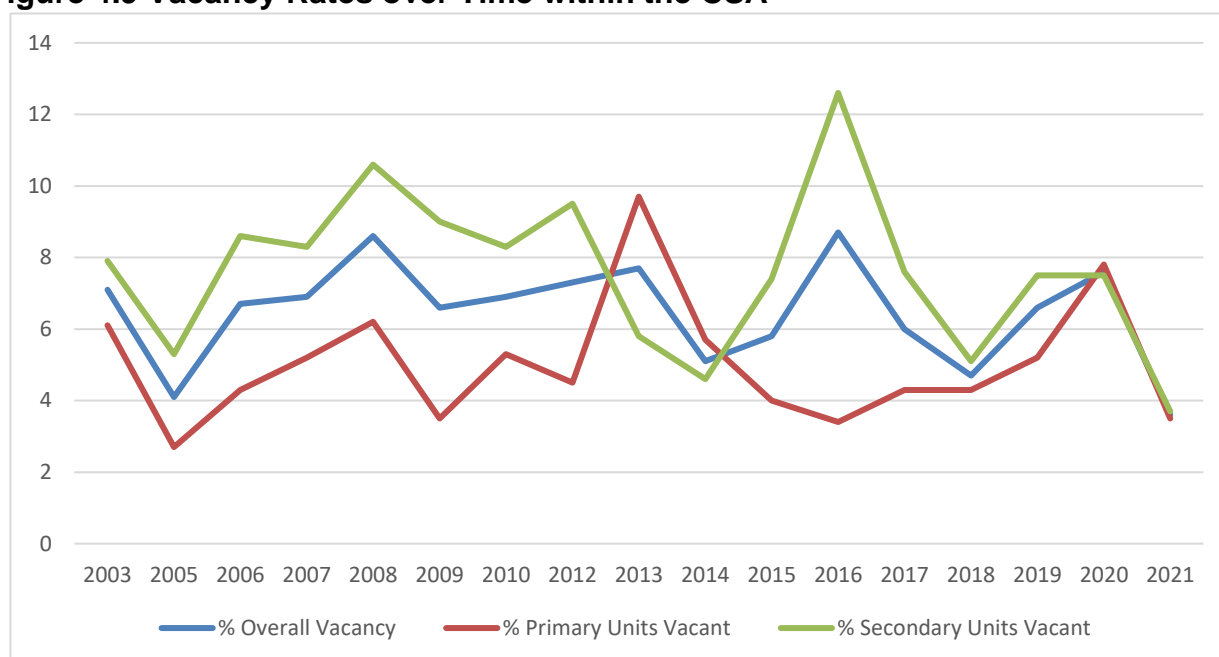
Figure 4.8 Number of Vacant Units over Time within the CSA

	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
2021	10	3.6	3.5	3.7

4.6.2 The 2021 retail survey records a significant decrease of 4% and 11 units in the overall vacancy rate of Abergavenny town centre. After a high (8.7%) in 2016, the overall vacancy rate fell and gradually increased again since 2018 through 2020. The high rate (7.6%) recorded in 2020 likely reflected the initial impact of the pandemic and associated restrictions. However, the 2021 overall vacancy rate is the lowest on record, reflecting that Abergavenny has recovered from the initial impact of the pandemic considerably well and further demonstrates desire to be located in Abergavenny CSA. Vacancy within the Primary Shopping Frontage has also decreased by a significant 4.3%, whilst vacancies in the Secondary Shopping Frontage have decreased 3.8%.

Figure 4.9 Vacancy Rates over Time within the CSA



4.7 Pedestrian Flows

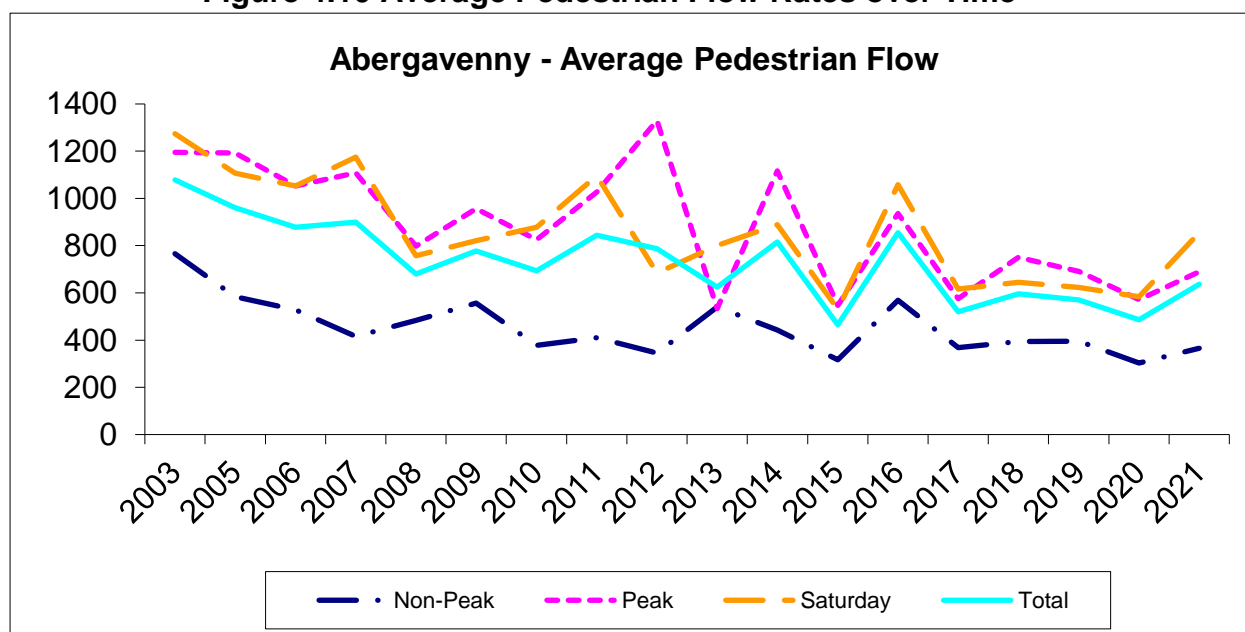
4.7.1 As part of the retail survey a pedestrian flow count is undertaken at several strategic points throughout the town centre, including; Lion Street, the Town Hall, Tesco Store (Frogmore Street), Cibi Walk (King Street end and Frogmore Street end), Lewis's Lane, Nevill Street, St. Johns Street, Flannel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

4.7.2 The graph below indicates that pedestrian flows have gradually declined over the past 18 years within the Abergavenny CSA, with this decline evident at all three times when the survey is undertaken. However, the 2021 footfall survey

indicates an increase in all average flows. Whilst the increase is not to the levels seen in the early 2000s, the increase may in part reflect the impact of removing restrictions associated with the Covid-19 pandemic and the popularity of the Abergavenny CSA to the surrounding catchment, as well as the ambition of consumers to resume some form of normality.

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, in some cases, this was less than in previous years and may be in part due to increased numbers working from home as a result of the pandemic and therefore not going into Abergavenny CSA over lunch breaks. As indicated by Figure 4.10 the largest average pedestrian flow was recorded on a Saturday followed by the peak day and non-peak day. The highest peak average pedestrian flow was recorded at the Frogmore Street End of Cibi Walk which also recorded the highest average pedestrian flow on a Saturday. High Street also recorded high average pedestrian flows on both Saturday and the peak day, where Flannel Street recorded noticeably lower counts.

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 67 are disabled bays and two of the car parks feature electric vehicle charging points. 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 central location with recently improved public realm and 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 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 enhance 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, graffiti, or dilapidated premises. Measures such as the installation of street furniture on Cross Street during the Covid-19 pandemic have potentially increased the appeal of the town centre for pedestrians and appeared to be well-used at the time of the survey.

4.10 Household Survey

4.10.1 The Council have conducted a series of household surveys over the past 25 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 in 2009 as part of a larger Retail and Leisure Study which was undertaken as a background study for the Local Development Plan. The survey was undertaken again 2015 and most recently in early 2022.

4.10.2 For the latest survey a total of 1,000 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 2022 survey just under two thirds of respondents do their main food shopping once a week or more often, this rises to 76% for respondents from the Abergavenny catchment area.

Figure 4.11 Main Convenience Shopping Outlet

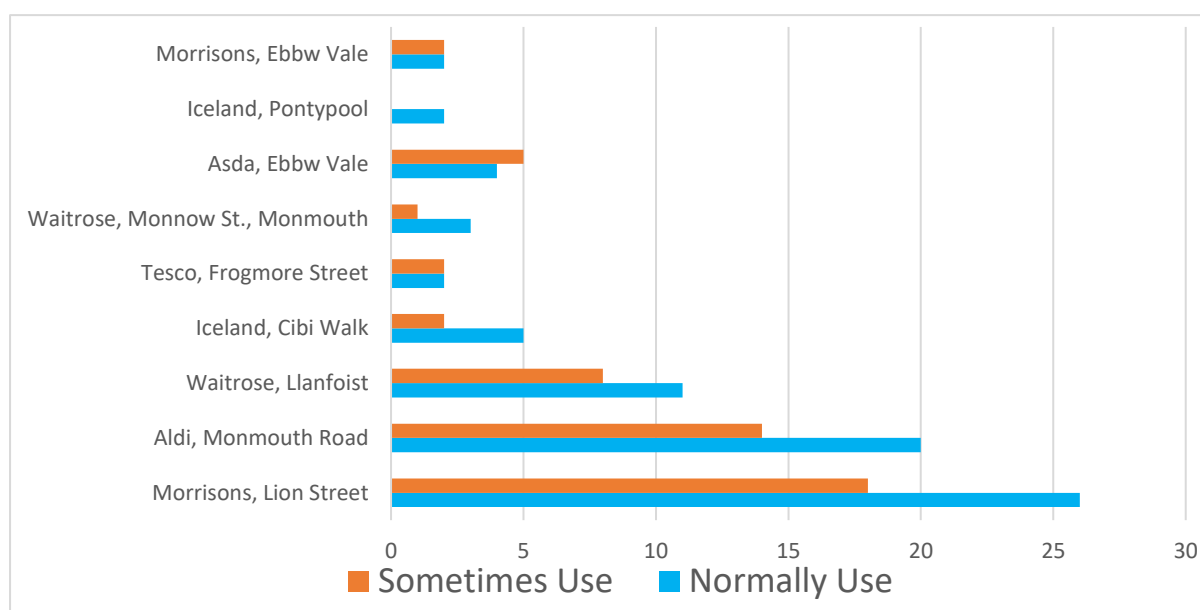
Outlet (%)	1997	2006	2009	2015	2022
Safeway (town centre)	34	-	-	-	-
Morrisons, Lion Street	-	-	-	-	26
Tesco, Frogmore Street	26	36	28	12	2
Waitrose (Llanfoist) (Safeway – 1997)	18	18	27	24	11
Kwiksave (town centre)	3	-	-	-	-
Iceland (town centre)	-	2	3	3	5
Aldi, Monmouth Road	-	-	-	30	20
Other Local Shops	1	1	-	-	-
Total Abergavenny	82	58	58	69	64
Other Monmouthshire	3	2	2	1	9
Outside County	15	40	40	30	22
Cwmbran	6	10	4	6	4
Ebbw Vale	2	14	27	11	7
Newport	2	2	1	1	6
Hereford	3	4	4	2	-

Internet	-	-		5	5
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4.10.5 Of those interviewed in the Abergavenny zone 64% said they do their main convenience shopping in Abergavenny, this is down on the levels recorded in the previous survey, but above levels 2006 and 2009. However, the number respondents who do their main food shop outside of the County has fallen. The most noticeable recent change is the high percentage of respondents (26%) who are undertaking their main food shop in the Morrisons store on Lion Street. From the responses it would appear that it is drawing some trade away from the Tesco and Aldi stores but also from outside the County, in particular outlets in Ebbw Vale.

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 Morrison's store (26%) Aldi store (20%) the Waitrose in Llanfoist (11%) have the largest share, with the Iceland at Cibi Walk with considerably less at 5%.

Figure 4.12 Stores Visited for Main Food Shop



4.10.7 Of those interviewed in the Abergavenny zone, 58% said they do their top-up convenience shopping within the town. This represents an 18% decrease since the previous survey in 2015 where the 2022 survey records that approximately 1/3 are 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.

Figure 4.13 Top up Convenience Shopping Outlet

Outlet (%)	1997	2006	2009	2015	2022
Local Shops / Other Abergavenny	31	11	16	12	10
Safeway (town centre)	19	-	-	-	-
Morrisons	-	-	-	-	12
Tesco	19	22	26	17	9
Waitrose (Llanfoist) (Safeway – 1997)	8	22	17	21	8
Kwiksave	5	-	-	-	-
Iceland	3	5	8	3	1
Aldi, Monmouth Road	-	-	-	21	17
Local Market	1	-	3	2	1
Total Abergavenny	86	60	70	76	58
Other Monmouthshire	7	3	3	4	7
Outside County	7	37	28	20	33
Cwmbran	2	7	1	1	-
Ebbw Vale	1	5	6	4	8
Newport	1	1	1	0	10
Hereford	2	1	2	1	2
Internet	-	-	-	-	2

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 Newport.

Figure 4.14 Comparison Shopping

%	Abergavenny	Other Mon'shire	Internet	Outside County/Other
1 st choice clothes, footwear and other fashion goods	32	3	26	39 1. Cwmbran - 9% =2. Bristol Cribbs Causeway/ Newport Retail Park – 4%
2 nd choice clothes, footwear and other fashion goods	5	6	9	80 1. Hereford – 7% 2. Cwmbran – 6%
Books, music, DVDs and toys	30	3	45	22 1. Cwmbran – 5% 2. Hereford - 3%
Chemist goods, toiletries and cosmetics	61	10	7	22 1.Cwmbran – 4% 2. Friars Walk, Newport – 3%
Furniture, carpets and soft furnishings	32	1	24	43 1. Newport Retail Park – 8% 2. Hereford – 7%
Household goods, glass, china and tableware	52	7	16	25 1. Newport Retail Park– 5% 2. Hereford – 3%
Electrical goods	16	3	38	55 1.Cwmbran – 9% 2. Newport Retail Park – 6%
DIY, hardware and gardening goods	57	8	11	24 1. Cwmbran – 5% 2.Newport Retail Park – 4%
Banking, financial and legal services	51	3	29	17 1. Newport Town Centre – 3% 2. Hereford – 2%

- 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, and electrical goods. Since the 2015 survey, there has been an increase in the proportion of respondents in the Abergavenny zone shopping online for all goods, and in particular, for clothes footwear and other fashion goods and banking, financial and legal services. The increase in proportion of those shopping online has been seen throughout Monmouthshire and reflects a national trend.
- 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, 45% said they usually went to the Baker Street Cinema, with 13% using the Vue Cinema in Cwmbran and 9% the Market Hall in Ebbw Vale, 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. 42% of those who use this type of facility said they used the Abergavenny Leisure centre, with 16% using other leisure facilities in the Town, 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, 42% would go to Cardiff to visit a museum, 51% would go to Cardiff to visit an art gallery and 35% would go to Cardiff for the theatre. Although the presence of a local theatre in the town means that 17% would visit the theatre in Abergavenny.

4.11 Town Centre Initiatives and Regeneration Programmes

- 4.11.1 The 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 2,850m² Morrison's food store together with provision of 233 car parking spaces (including 15 parent & child spaces), 13 disabled spaces and 2 motorcycle spaces was granted. 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. The market in Brewery Yard was noticeably well attended and busy at the time of the 2021 survey in November.

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. This is evidenced by the noticeably high average pedestrian flows recorded on High Street in 2021.

4.11.6 More recently, Monmouthshire County Council has implemented a range of measures through the re-opening town centres project over the past couple of years within the Abergavenny CSA. These include the part-time pedestrianisation of Cross Street; the provision of planters, pods, parklets and outdoor trading space in Cross Street. Cumulatively, the schemes create a safer, more accessible, and enhanced environment for the pedestrian and shopper in light of the Covid-19 pandemic.

4.12 Other Future Retail Development

4.12.1 At the time of writing this report the application for the extension of the Aldi store at the southern end of Cross Street and just off the A40 referred to in the previous survey, had been granted planning permission. 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. 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.

The map illustrates the Central Shopping Area (CSA) and Primary Shopping Frontage (PSF) in Caldicot. The CSA is defined by a red boundary, and the PSF is highlighted in blue. The map includes various landmarks and buildings, such as the Cross Inn (PH), War Memorial, Library, and Wesley Buildings. The streets shown include Sandy Lane, Church Lane, and Wesley Lane. A key in the bottom right corner defines the CSA and PSF areas.

Key

- Central Shopping Area (CSA)
- Primary Shopping Frontage (PSF)

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 2021 was £41,033, relative to £43,266 for the county as a whole, and £34,700 for Wales. Out of the households in the Caldicot catchment area, 18.8% are below 50% of the median income for the UK, and 25.4% below 60%. This compares to 17.3% and 23.4% respectively for Monmouthshire, and 26.1% and 34% for Wales as a whole (Appendix B).

5.3 Diversity of Uses

- 5.3.1 The most recent survey extends an established trend of an increasing number of service outlets, whereby they account for over half of all outlets in the CSA with a proportion of 59.1%. In contrast, comparison outlets, which account for 24.2% of all outlets, have seen a decline since 2010, however the 2021 survey records an increase in their number and proportion after a decrease to an all-time low in the previous survey in 2020. The number and proportion of convenience outlets has remained relatively stable and their proportion of 10.6%, reflects the presence of the ASDA superstore, not currently within the CSA.

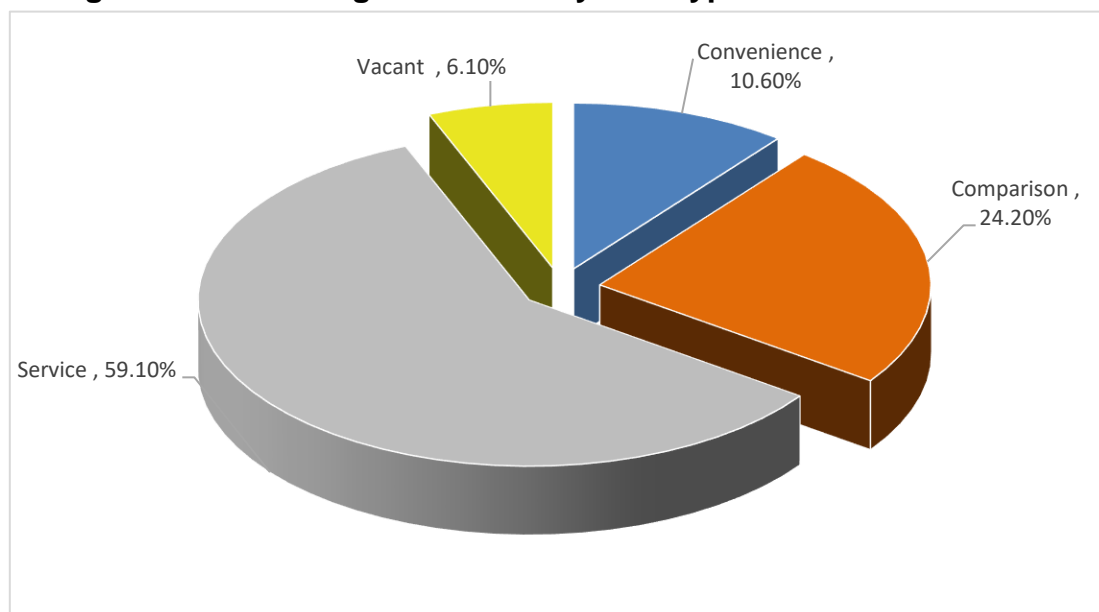
Figure 5.2 Number of Outlets within the CSA by Use Type over Time

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
2021	16	24.2	7	10.6	39	59.1

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

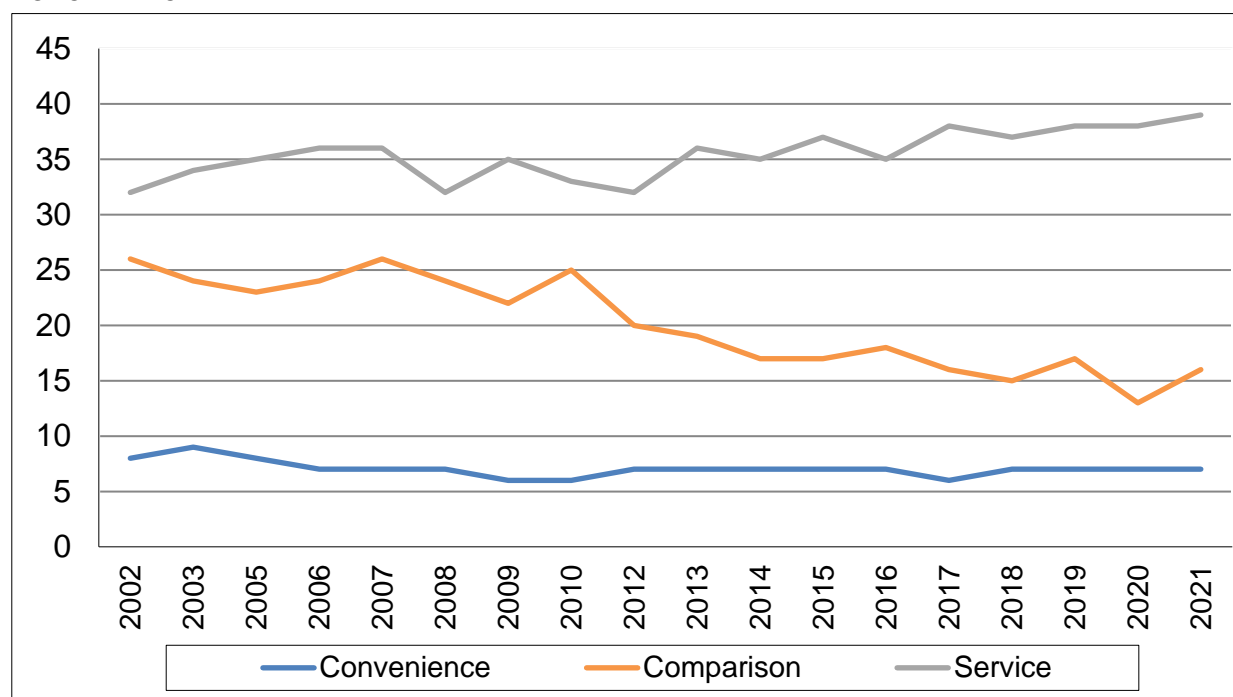
Figure 5.3 Percentage of Outlets by Use Type within the CSA



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 2021 survey indicates that this trend is continuing and records a high of 39 service outlets within the Caldicot CSA. However, the 2021 survey recorded an increase in the number and proportion of comparison outlets where the increase in the number of service outlets was only marginal. Despite this, there is still a substantial difference between the number of comparison and service outlets in the Caldicot CSA.

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 an increase in its service proportion over the past couple of surveys.

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

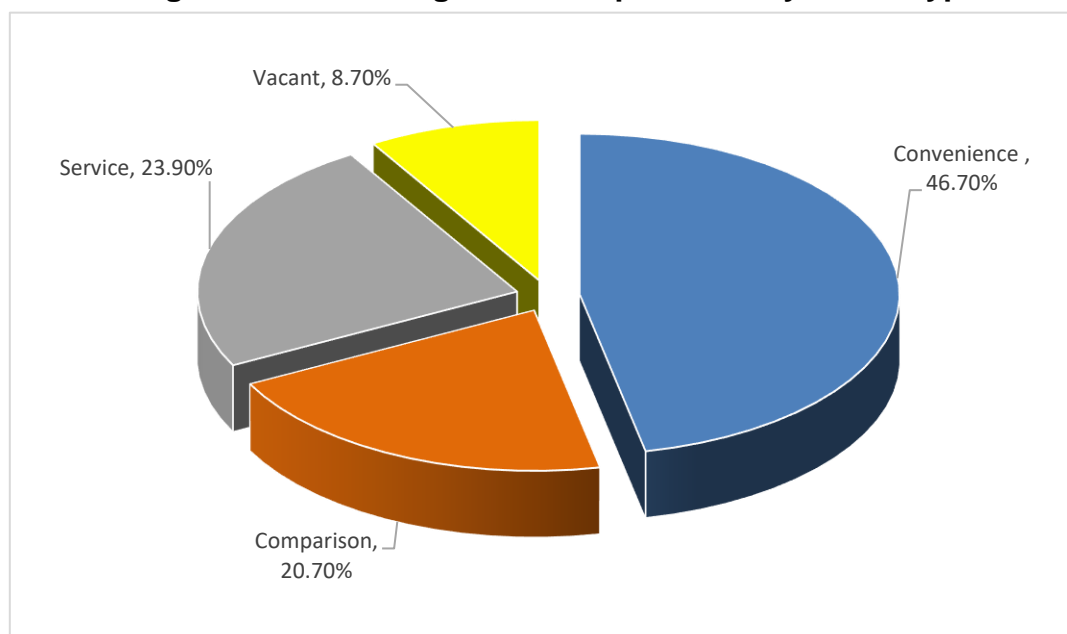
Year	Comparison %	Convenience %	Service %
2002	45	29	24
2005	43	32	24
2006	45	25	28
2008	47	25	25
2010	48	24	25
2012	30	24	24
2013	41	24	28
2014	39	25	29
2015	28	47	22
2016	28	47	20
2017	25	46	25
2018	20	46	24
2019	21	46	24
2020	18	46	24
2021	20.7	46.7	23.9

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 10,000m² in 2021. 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, the comparison proportion 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 over 59% 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 relatively 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 600m² 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); The Cellar (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 retailers, which account for over 13% of all CSA outlets. The convenience sector has the largest representation of national retailers with stores such as Aldi 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, two betting shops, a national bank (Lloyds TSB), estate agents and a couple of 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	2021
Number of Outlets	8	7	6	7	7	9	10	10	9	9	9	9

5.4.3 The 2021 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. This is evidenced by the fact that Waitrose supermarket vacated the CSA in 2021 and was replaced by another convenience store in Aldi. 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 and as noted above, Aldi now occupy the premises at the Wesley Buildings previously occupied by Waitrose until 2021.

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.

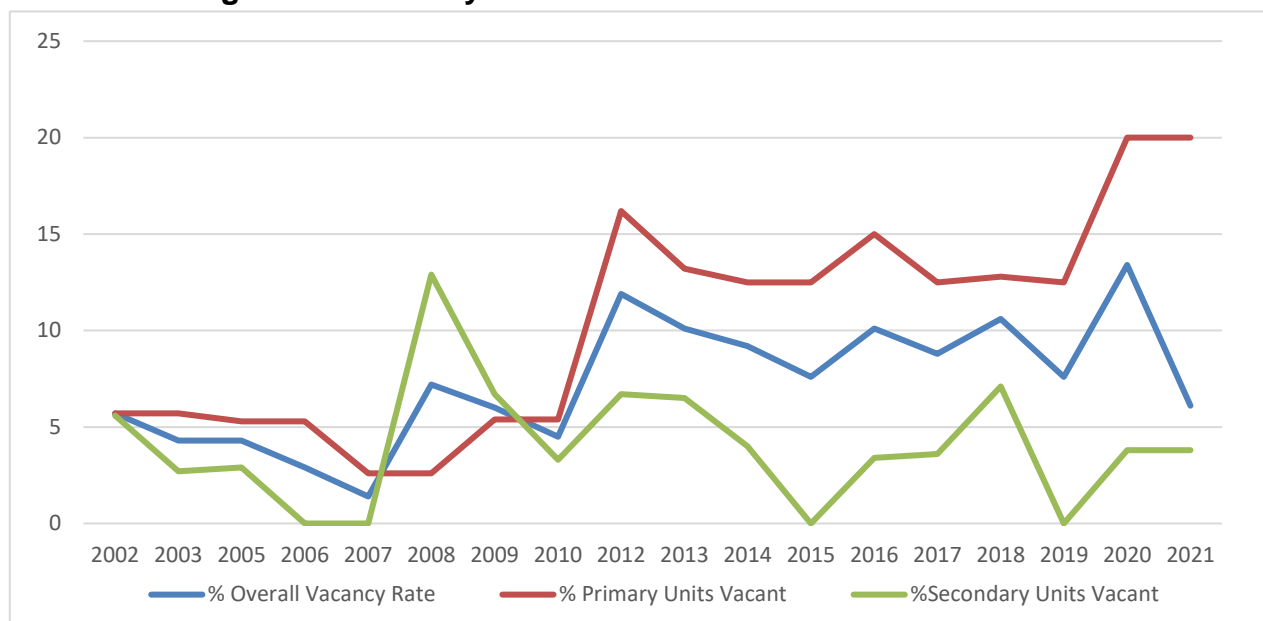
5.6.2 Figure 5.8 illustrates the current and past vacancy rates for the Caldicot CSA.

5.6.3 Caldicot town centre had a total of 4 vacant units at the time of the most recent survey, representing 6.1% of all outlets within the CSA. This is a significant decrease of 5 units and 7.3% respectively on levels recorded in 2020 and is the lowest overall vacancy since 2010. This demonstrates that Caldicot has recovered from the initial impact of the pandemic reasonably well and that there is demand for retail space in the Caldicot CSA. This reduction is also reflected in primary frontage rates, where the vacancy rate decreased considerably to 7.5%. In secondary frontages, one unit was recorded as vacant, representing 3.8% of all units in the secondary frontage, the same as 2020.

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
2021	4	6.1	7.5	3.8

Figure 5.9 Vacancy Rates over Time within the CSA

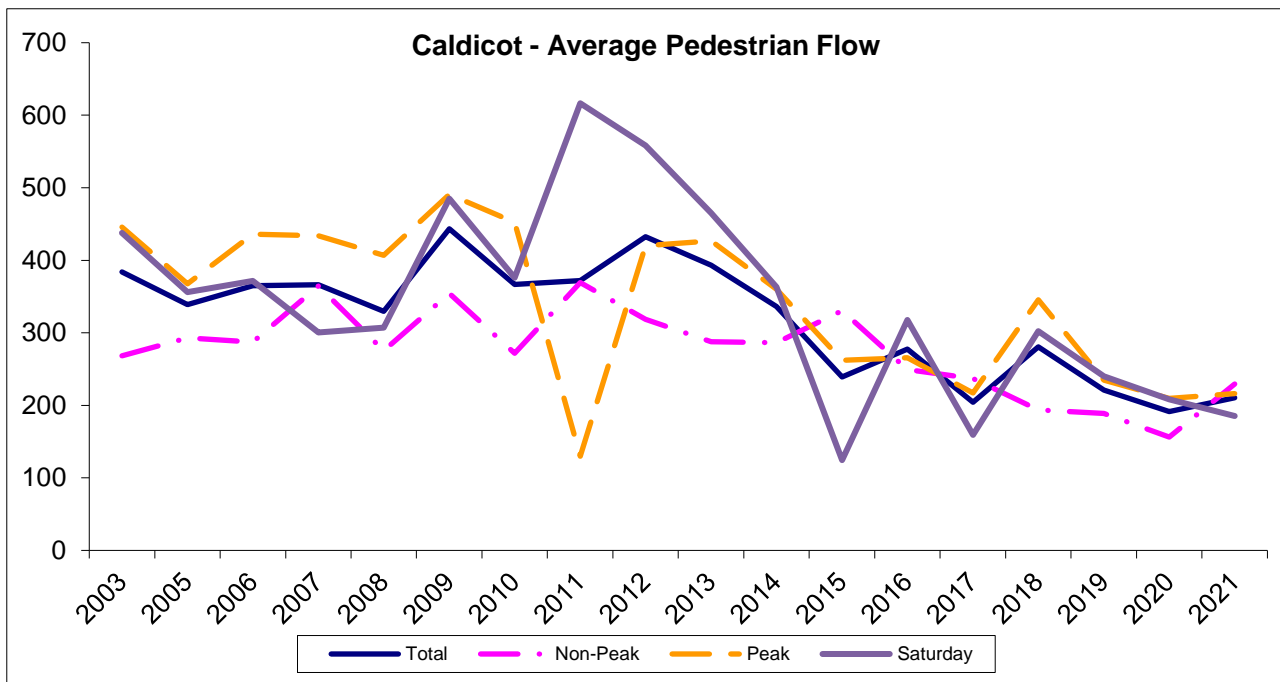


5.7 Pedestrian Flows

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 Aldi.

5.7.2 The graph below shows the average pedestrian flow over time. Total average pedestrian flow remained relatively stable up to 2012 where it started to decline considerably in 2013. In 2021 all average pedestrian flows increased marginally, except for the Saturday average pedestrian flow which fell marginally. With the exception of the Saturday average flow, this increase contrasts the trend of decline seen in more recent surveys. Whilst the increase is only marginal, it may in part reflect the impact of removing restrictions associated with the Covid-19 pandemic and the popularity of the Caldicot CSA to the surrounding catchment, as well as the ambition of consumers to resume some form of normality. As seen in figure 5.10 below, in 2021, the non-peak average flow was the highest of the three flows. Whilst only marginal, this has not been the case since 2017, where the Saturday average pedestrian flow was also the lowest and had fallen since the 2016 survey.

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, in some cases, this was less than in previous years and may be in part due to increased numbers working from home as a result of the pandemic and therefore not going into Caldicot CSA over lunch breaks. The areas with highest pedestrian flows are outside Car Park Lane and Aldi, both count points have sustained relatively high counts for several years. Since 2011 there has been a considerable decline in the Saturday average pedestrian flow where the survey recorded an average flow of 616. In 2012 this was just over 558, and then 363 in 2014. The 2016 survey recorded an average pedestrian flow on a Saturday of 318, which then fell again to 159 in 2017. After a sharp increase in 2018 to 302, the average flow on a Saturday declined again in 2019 to 240 and then to 208 in 2020. The 2021 survey recorded the Saturday average pedestrian flow as 185. Over this period, there has been a net decrease of 431 in the average pedestrian flow on a Saturday. The 2021 average pedestrian flow for Saturday in Caldicot is the second lowest of all settlements surveyed.

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

12 disabled bays and electric vehicle charging capacity) in two locations both managed by the Council. 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 $\frac{3}{4}$ 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. The recently completed public realm works at 'The Cross' end of Newport Road in the CSA also enhance the environmental quality of the town centre.

5.10 Household Survey

5.10.1 The Council have conducted a series of household surveys over the past 25 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 survey was undertaken again 2015 and most recently in early 2022.

5.10.2 In January 2022; 1,000 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.

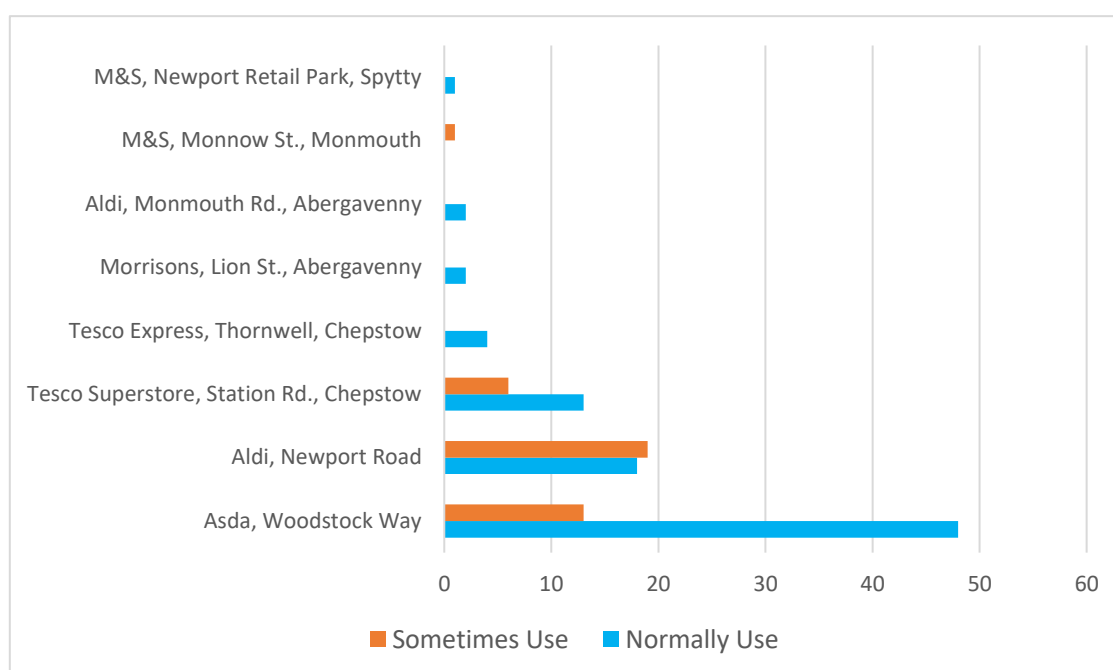
- 5.10.3 All of the household surveys which have been undertaken to feed into the Retail Background Paper follow a broadly similar methodology so that whilst they do not allow for an exact comparison they do give some indication, over time, of changing shopping habits.
- 5.10.4 Of those interviewed in the Caldicot zone, 66% said that they do their main convenience shopping in Caldicot, a 9% increase on the previous survey. The opening of the Asda store on Woodstock Way has appeared to have increased trade retention in the town with 48% 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	2022
Aldi (Waitrose – 2007,2021) (Somerfield – 1997, 2006)	39	21	23	10	18
Co-op (West End)	-	-	2	2	0
Kwiksave	9	-	-	-	-
Asda (Woodstock Way)	-	-	-	45	48
Total Caldicot	48	21	25	57	66
Other Monmouthshire	14	61	43	23	28
Outside County	38	18	32	20	3
Internet	-	-	-	-	3

- 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 48% 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, 53% said they do their top-up convenience shopping within the town, with 11% of those undertaking their top up shop at local stores.

Figure 5.13 Top Up Convenience Shopping Outlet

Outlet (%)	1997	2006	2009	2015	2022
Local Shops	16	3	18	5	11
Aldi (Waitrose – 2007,2021) (Somerfield – 1997, 2006)	35	38	40	17	25
Co-op (West End)	-	2	19	20	4
Kwiksave	16	-	-	-	-
Asda Woodstock Way	-	-	-	43	13
Total Caldicot	67	43	77	85	53
Other Monmouthshire	18	48	13	12	31
Outside County	15	9	10	3	15
Internet	-	-	-	-	1

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 Spytt Retail Park at Newport although Bristol Cribbs Causeway is also drawing trade away from the town.

Figure 5.14 Comparison Shopping

%	Caldicot	Other Mon'shire	Internet	Outside County/Other
1 st choice clothes, footwear and other fashion goods	1	4	47	48 1. Newport Retail Park - 17% 2. Bristol Cribbs Causeway – 14%
2 nd choice clothes, footwear and other fashion goods	6	4	18	72 1. Newport Retail Park – 14% 2. Bristol Cribbs Causeway 12%
Books, music, DVDs and toys	4	15	56	25 1. Bristol Cribbs Causeway – 8% 2. Friars Walk, Newport – 6%
Chemist goods, toiletries and cosmetics	55	25	2	18 1. Bristol Cribbs Causeway – 11% 2. Friars Walk, Newport – 5%
Furniture, carpets and soft furnishings	2	8	21	69 1. Newport Retail Park – 37% 2. Bristol Cribbs Causeway – 9%
Household goods, glass, china and tableware	13	18	40	29 1. Newport Retail Park – 8% 2. Bristol Cribbs Causeway – 5%
Electrical goods	1	6	52	41 1. Newport Retail Park – 13%

%	Caldicot	Other Mon'shire	Internet	Outside County/Other
				2. Bristol Cribbs Causeway – 8%
DIY, hardware and gardening goods	44	34	10	12 =1. Cardiff City Centre/Friars Walk, Newport– 1%
Banking, financial and legal services	22	11	43	24 1. Newport Town Centre – 7% 2. Friars Walk, Newport – 6%

- 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 clothes, footwear and other fashion goods. Since the 2015 survey, there has been an increase in the proportion of respondents in the Caldicot zone shopping online for goods. This is with the exception of furniture carpets and soft furnishings and DIY, hardware and gardening goods which both fell. The largest increase in the proportion shopping on the internet was for clothes, footwear and other fashion goods, which rose by over 50% since the previous survey.
- 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, 23% said they normally visited the Vue Cinema at Bristol Cribbs Causeway with 14% usually visiting the Everyman Cinema in Cardiff. The most popular cinema in 2015, the Cineworld at Newport Retail Park, is the fifth most popular in the latest survey.
- 5.10.10 Respondents were also asked which gym or sports/leisure centre they usually used. 21% of those who use this type of facility said they used Caldicot Leisure centre, which was equal with Chepstow and Monmouth Leisure Centres.
- 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, 79% would go to Cardiff to visit a museum. 34% would go to Monmouth, which had the same proportion as Newport, to visit an art gallery and 32% would go to

Bristol for the theatre, although the presence of a more local theatre in Newport means that 10% 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 (now Aldi) 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 2,900m², 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, Newport Road and shopfront and property enhancements. The Caldicot Town Centre Regeneration Strategic Project Framework sets out the key projects in detail. Work on the area of 'the Cross' is now complete and has enhanced that part of the CSA. The Newport Road works involve creating a pedestrian friendly environment that encourages active travel such as cycling and walking and develops and upgrades links to local historic and environmental assets. The shopfront and property enhancements involve improving the appearance of premises in the town centre and intends to bring vacant properties back into use. 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

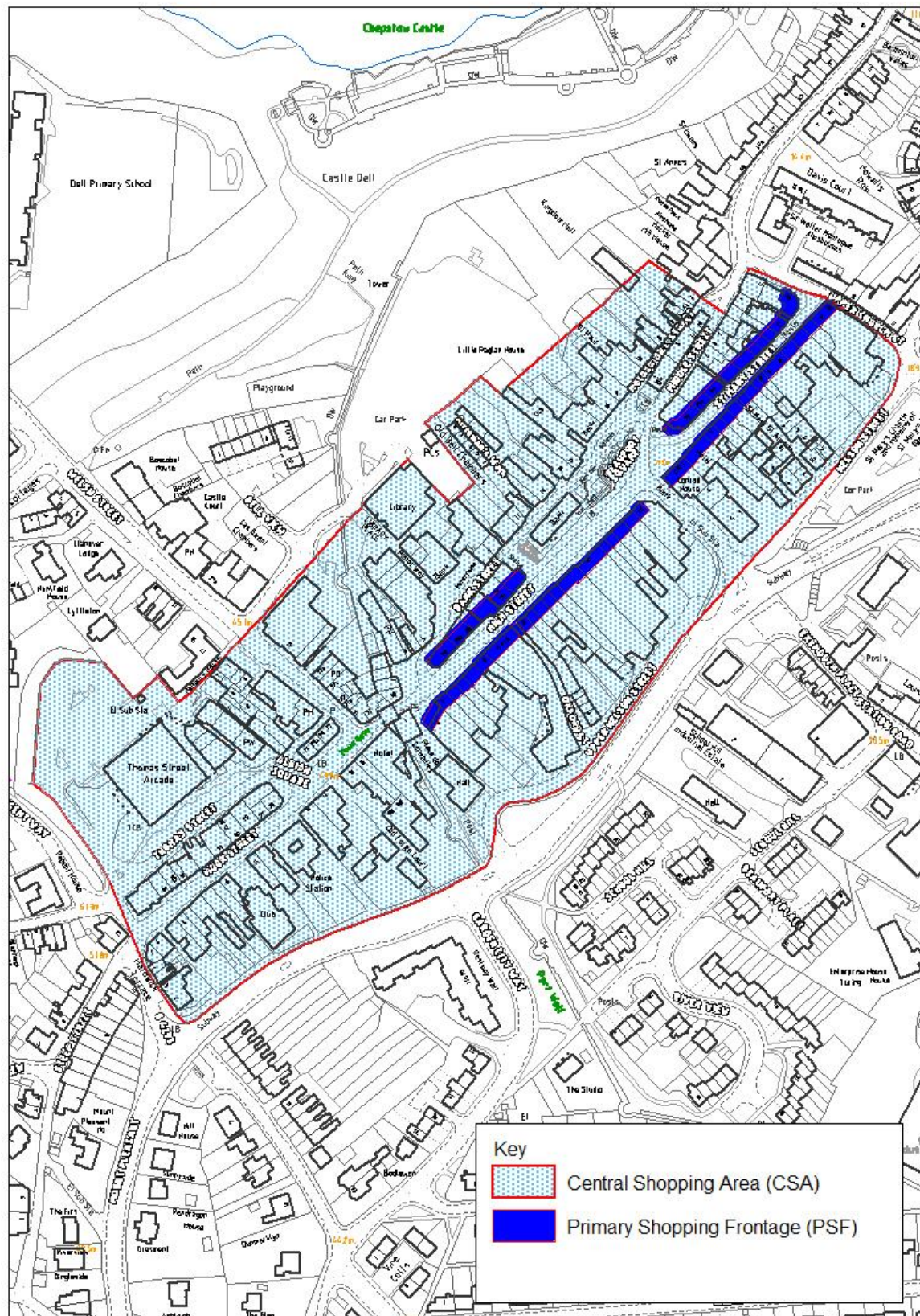
- 5.12.1 At the time of writing this report there are no proposed retail developments with either outline or full planning permission within the CSA of Caldicot. As noted previously, Aldi now occupy the premises at Wesley Buildings, previously held by Waitrose until 2021.

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 once a week on Sunday.
- 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. 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 2021 was £46,263, relative to £43,266 for the county as a whole, and £34,700 for Wales. Out of the households in the Chepstow catchment area, 15.3% are below 50% of the median income for the UK, and 20.9% below 60%. This compares to 17.3% and 23.4% respectively for Monmouthshire, and 26.1% and 34% for Wales as a whole (Appendix B).

6.3 Diversity of Uses

6.3.1 Similarly to previous surveys, the 2021 survey indicates that the majority of outlets within the Chepstow CSA are service outlets which account for 47% of outlets. The number of comparison outlets has gradually decreased since 2016 and after a relatively sharp decline recorded in 2019, comparison outlets represented 34.7% of outlets within the CSA in 2020. However, the 2021 survey records a marginal increase in their number and proportion, whereby they represent 35.9% of outlets in the Chepstow CSA. Service outlets 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.

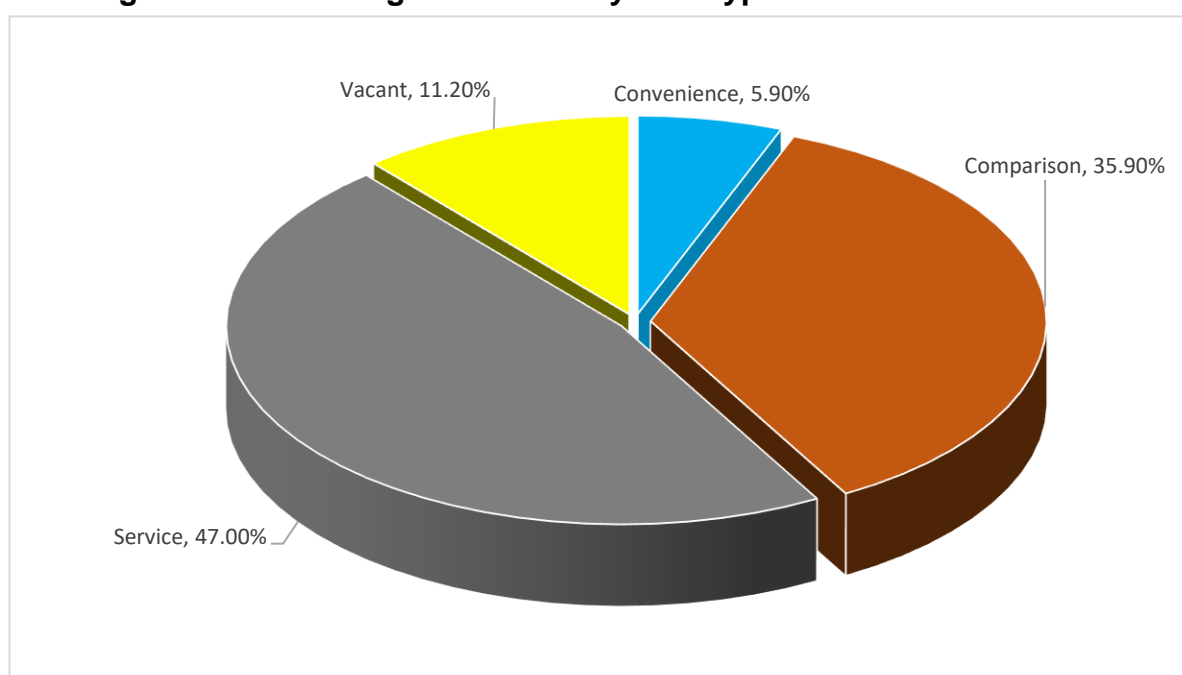
Figure 6.2 Number of Outlets within the CSA by Use Type over Time

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
2021	61	35.9	10	5.9	80	47.0

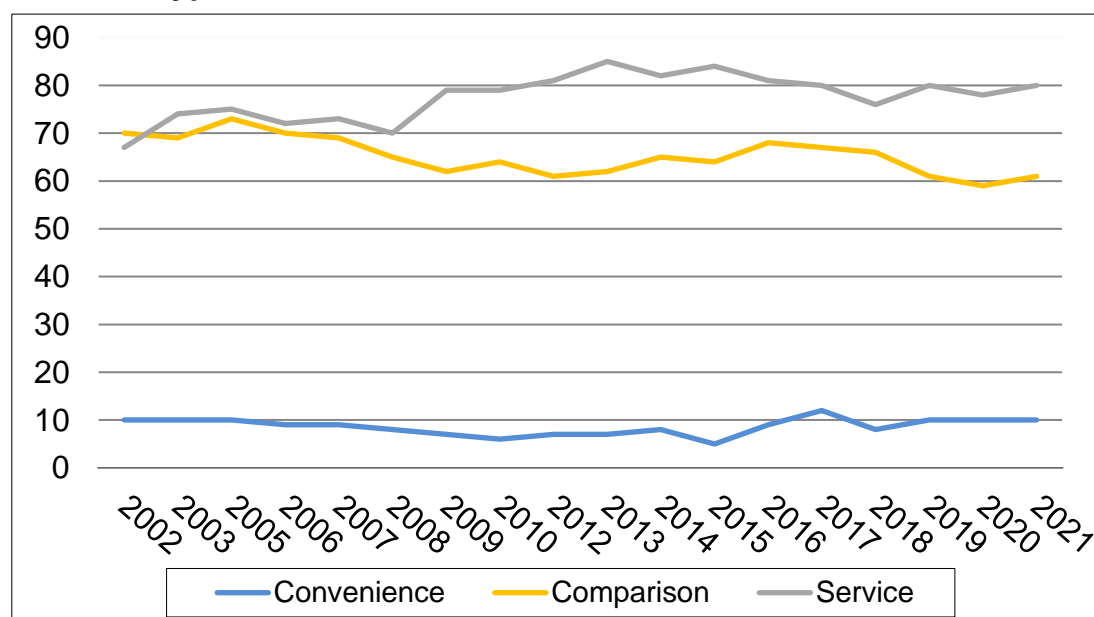
Note: Percentages include vacant units that are dealt with separately in section 6.6

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 relative 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. The proportion of convenience outlets has been consistent over the past three surveys as indicated by figure 6.4. 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%) in 2020. The 2021 records an increase in their number and proportion to 35.9%, however this is only marginal and not at levels seen in the early to mid-2000s. 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 outlets in the CSA, 38.5% in 2002, against 49.4% at the time of the 2015 survey. The 2021 survey records a further increase in their proportion after a slight decline in 2020, where they now represent 47% of outlets. Service outlets still have the majority proportion 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
2021	35	24	31

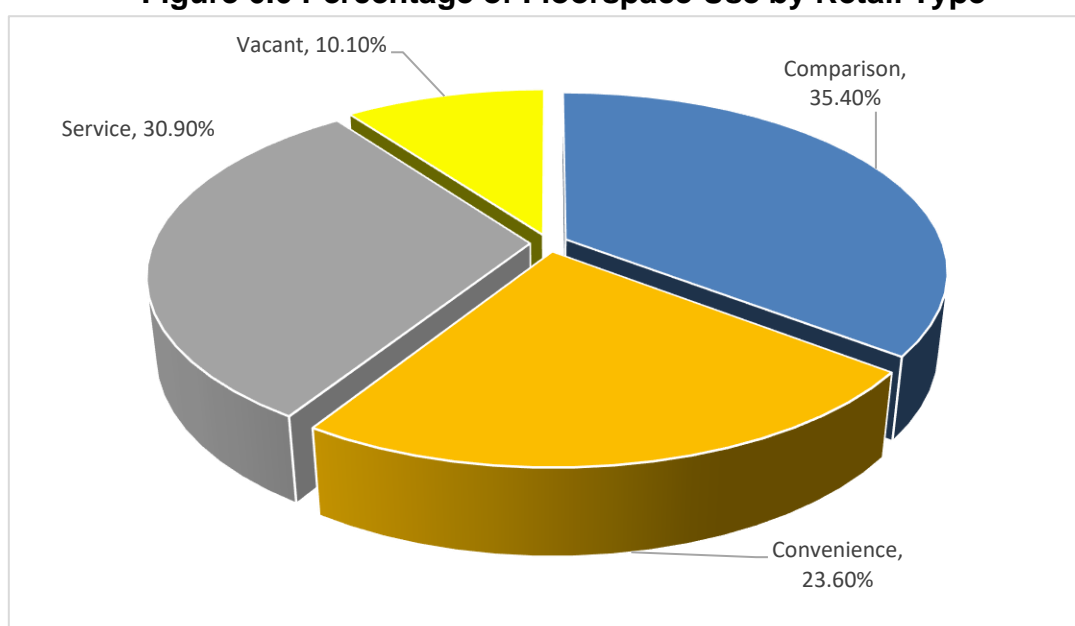
Note: Total and percentage figures include vacant units which are dealt with separately in section 6.6

6.3.4 Chepstow town centre has an estimated net retail floorspace of just over 18,200m² in 2021, of which 35% 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 to a lesser extent, convenience uses has declined over time. The 2021 survey records a minor increase in floorspace proportion for comparison goods (35%) after an all-time low in 2020. However, this increase is only marginal and the proportion is still lower than that seen for comparison outlets in the early 2000s. This trend of decline over time is also reflected in other Market towns. Both comparison and convenience floorspace have seen a net decline since 2002 of 5% 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 47% 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, Town Council offices, a library, museum, tourist information centre and other tourist attractions. There is a police station, a doctor's 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 (300m²) 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 3,000m² 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. At the time of writing, an application was pending determination for the relocation of the aforementioned Lidl store to the opposite side of the road and to the north at the former Severn Bridge Social Club.

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 11.8% at the time of the most recent survey, which is lower than Abergavenny (15.6%), 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 and Parsons Bakery also feature 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 Clothes, 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
2021	20

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 and newsagent.
- 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 over the past 18 months. However, the lifting of restrictions may help encourage increased tourism. 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, the 2021 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 2021. This figure is the same as the 2020 survey, however, is lower than in 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. The 2021 survey also recorded that the premises formerly occupied by All About Eve was now occupied by newly establish tea rooms. 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 2021 survey, was fully occupied. This perhaps reflects its popularity within the town and its location as a link between the town centre and the Tesco store. Another development, Rifleman's Walk, off Bank Street, perhaps has a higher popularity than St. Mary's Arcade as it is ideally located next to the main car park and town library with links into the town centre and an offering of a range

of units. Reflecting potential popularity and accessibility is that at the time of the survey, all premises within the development were occupied.

- 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 (now tea rooms) 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 Bidmead Cook Estate Agents, Tui Travel Agents and CCR Vape Bar whilst the Herbert Lewis store remains 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 2021 survey recorded a decrease in the number of vacant units and overall vacancy rate by 4 and 2.3% respectively. Overall vacancy (11.2%) is now the same as at 2019. Whilst the reduction is relatively small, it is encouraging and reflects that Chepstow may be starting to recover from the initial impact of the pandemic and associated restrictions and demonstrates desire to be located in Chepstow CSA. However, of the market towns in the County, Chepstow (11.2%) has the second highest overall vacancy rate and a considerably higher rate than Abergavenny (3.6%).

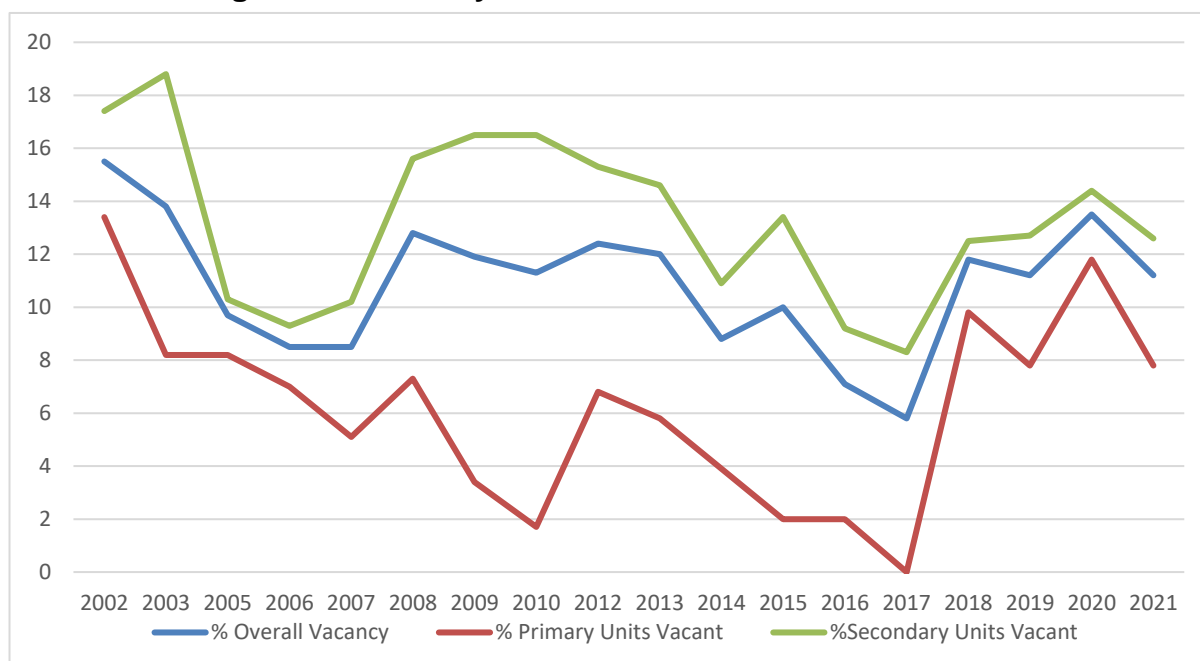
Figure 6.8 Number of Vacant Units over Time within the CSA

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
2021	19	11.2	7.8	12.6

6.6.4 At the time of the most recent survey, there were several vacant units within primary frontages representing 7.8% of outlets within this designation, a 4% decrease upon the previous survey. 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, at 12.6% as per the most recent survey, however, this represents a 1.8% decrease on the previous survey. Units that were vacant at the time of the 2021 survey within primary frontages, included; Herbert Lewis Department Store, CCR Vape Bar, Tui Travel Agents and the Principality & Bidmead Cook estate agents.

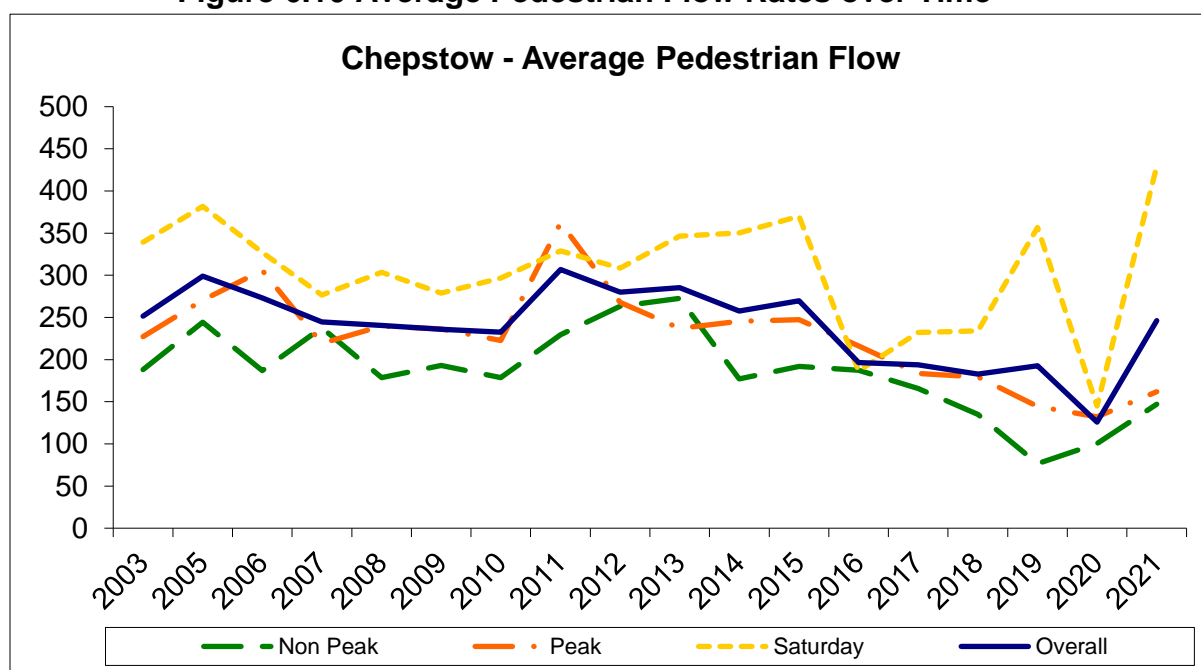
Figure 6.9 Vacancy Rates over Time within the CSA



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 the Library Arcade.
- 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 decreased again in 2020. However, average pedestrian flow increased across all measures in 2021 and in particular, the Saturday average pedestrian flow, which in 2021 was the highest on record. The increase may in part reflect the impact of removing restrictions associated with the Covid-19 pandemic and the popularity of the Chepstow CSA to the surrounding catchment, as well as the ambition of consumers to resume some form of normality. Of note, is that the Saturday average pedestrian flow is almost always consistently higher than other flows. On the Saturday, St Mary's Arcade recorded the highest average pedestrian flow followed by Welsh Street and then Upper Church Street.

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.. 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 car parks are subject to charging and at the time of the 2021 survey appeared to be popular and well used.
- 6.8.3 In addition to the above, 98 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 (169 spaces, including 11 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 and across the A48 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. St Mary's Street continues to record some of the highest average pedestrian flows in the town. 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. Measures such as the temporary pedestrianisation of High Street implemented during the Covid-19 pandemic help create a safer environment for pedestrians and foster more active travel.

6.10 Household Survey

6.10.1 The Council have conducted a series of household surveys over the past 25 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 survey was undertaken again 2015 and most recently in early 2022.

6.10.2 In January 2022; 1,000 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	2022
Tesco (town centre)	-	62	62	45	32
Somerfield (now Co-operative) (town centre)	28	12	9	-	-
Lidl (Bulwark)	-	2	7	15	10
Spar (Bulwark)	-	-	-	-	-
Tesco Express (Thornwell)	-	-	2	14	2
Kwiksave (town centre)	9	-	-	-	-
Marks & Spencer, Thomas Street	-	-	-	-	1
Total Chepstow	38	76	81	74	45
Other Monmouthshire	29	12	5	11	29
Outside County	34	12	15	15	20
Newport	24	8	7	3	9
Bristol	3	2	-	7	-
Cwmbran	2	-	1	-	5
Lydney	2	1	-	-	1
Internet	-	-	-	4	6

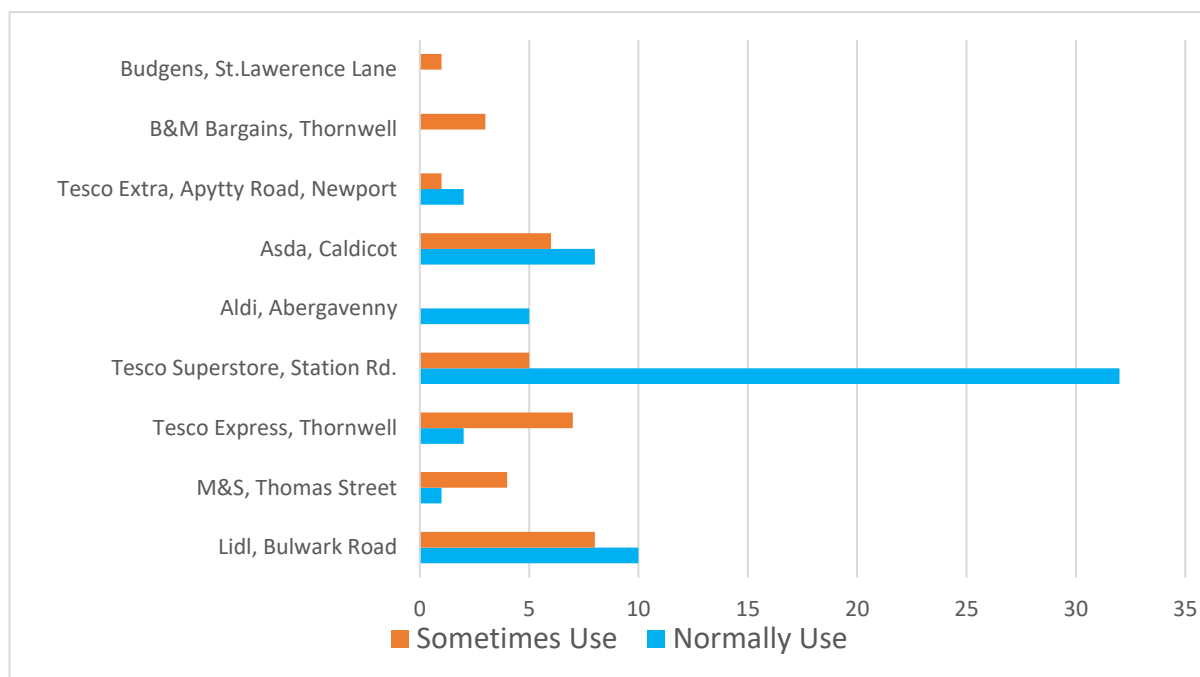
6.10.4 Of the people interviewed for the 2022 survey, just under two thirds do their main food shopping once a week or more often, this falls slightly to 62% of respondents in the Chepstow catchment area.

6.10.5 Of those interviewed in the Chepstow zone 45% said they undertake their main convenience shopping in Chepstow, this is higher than for Monmouth but lower than for Abergavenny. Chepstow is also acting as a trade draw to other settlements in the south of the County, with 18% of those interviewed in the Caldicot Zone and 24% of those in the Magor zone saying that they do their main food shop in Chepstow.

6.10.6 Whilst the edge of centre Tesco store continues to dominate and trade strongly, both its' and the Lidl on Bulwark Road shares have decreased in the latest survey with a 29% reduction in trade retention for the main convenience shop. At the same time the proportion of those doing their main convenience shop elsewhere in the County has increased by 18%. The most popular locations outside of Chepstow for the main convenience shop include the Asda in Caldicot, the Aldi in Caldicot and the Aldi in Abergavenny. Together these stores account for 18% of the 29% of respondents doing their main convenience shop outside of Chepstow and elsewhere in Monmouthshire.

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 (37%) and the Lidl in Bulwark Road (18%) have the largest share. However, this is reasonably closely followed by the Asda in Caldicot.

Figure 6.12 Stores Visited for Main Food Shop



6.10.8 Of those interviewed in the Chepstow zone, 37% 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 percentage of interviewees who do their top-up shop at local stores has fallen, however their continued use demonstrates the importance that neighbourhood centres have in the retail offer of the town. The proportion carrying out a top up shop elsewhere in Monmouthshire is largely similar, however there has been a significant increase in those doing their top up shop outside the County.

Figure 6.13 Top up Convenience Shopping Outlet

Outlet (%)	1997	2006	2009	2015	2022
Local Shops	15	3	5	11	5
Tesco Station Road	-	19	20	11	8
Somerfield (now Co-Operative) (town centre)	28	25	18	-	-
Kwiksave (town centre)	5	-	-	-	-
Lidl (Bulwark)	-	10	8	13	-
Spar (Bulwark)	8	2	9	2	9
Tesco Express (Thornwell)	-	-	8	14	5
Spar, St Lawrence Road	-	-	-	17	4
Marks & Spencer, Thomas Street	-	-	-	-	4
B&M Bargains, Thornwell					2
Total Chepstow	56	59	68	68	37

Other Monmouthshire	25	29	7	25	23
Outside County	19	12	24	7	38
Internet	-	-	-	-	2

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
1 st choice clothes, footwear and other fashion goods	9	9	25	57 1. Bristol Cribbs Causeway - 23% 2. Newport Retail Park – 8%
2 nd choice clothes, footwear and other fashion goods	4	7	14	75 1. Bristol City Centre - 12% 2. Bristol Cribbs Causeway - 10%
Books, music, DVDs and toys	21	9	38	32 1. Bristol Cribbs Causeway - 15% 2. Friars Walk, Newport - 4%
Chemist goods, toiletries and cosmetics	41	28	4	27 1. Bristol Cribbs Causeway - 10% 2. Friars Walk Newport - 3%
Furniture, carpets and soft furnishings	7	4	37	52 1. Bristol Cribbs Causeway - 14% 2. Cardiff City Centre – 5%
Household goods, glass,	23	9	22	46

%	Chepstow	Other Mon'shire	Internet	Outside County/Other
china and tableware				1. Bristol Cribbs Causeway - 20% 2. Newport Retail Park – 6%
Electrical goods	4	4	41	51 1. Bristol Cribbs Causeway - 15% 2. Newport Retail Park – 12%
DIY, hardware and gardening goods	57	17	7	19 1. Newport Retail Park – 7% 2. Bristol Cribbs Causeway - 2%
Banking, financial and legal services	28	15	31	26 1. Bristol Cribbs Causeway – 6% 2. Cwmbran – 4%

6.10.10 Figure 6.14 demonstrates that comparison good trade is being drawn away from Chepstow. Whilst some goods have seen retention increase since the 2015 survey, such as, clothes, footwear and other fashion goods and books, music DVDs and toys, the increase is only marginal. 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 Spytt Retail Park in Newport. In the DIY sector, however, Chepstow retains the joint highest percentage (with Abergavenny) of any of the towns.

6.10.11 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. Since the 2015 survey, there has been an increase in proportion of residents in the Chepstow zone shopping online for most goods, with the exception of books, music, DVDs and toys and banking, financial and legal services. There has been a particular increase in online shopping for clothes, footwear and other fashion goods. The increase in proportion of those shopping online has been seen throughout Monmouthshire and reflects a national trend.

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. 37% of respondents in the Chepstow zone said they visit the cinema with 28% of these usually visiting the Vue Cinema at Bristol Cribbs Causeway. The next most popular cinema was the Cineworld at Friars Walk, Newport (17%).

6.10.13 Respondents were also asked which gym or sports/leisure centre they usually used, 36% of those who use this type of facility said they used the Chepstow Leisure centre with a further 15% using the Marriott St Pierre Hotel & Country Club.

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. Of respondents in the Chepstow zone, 44% said they would visit Cardiff City Centre to visit a museum, with 10% staying in Chepstow to visit museums. Of those respondents who visit art galleries Cardiff was once again the most popular destination (43%) followed by Bristol (15%), however, 29% said that it varied. For those respondents who go to the theatre 48% would go to Cardiff and 25% would visit Bristol.

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.

6.11.2 More recently, Monmouthshire County Council has implemented a range of measures through the re-opening town centres project over the past couple of years within the Chepstow CSA. These include the part-time closure of High Street to vehicular traffic, on Bank Street; changes to the crossing areas, on Moor Street/Welsh Street and at Beaufort Square; the provision of planters, pods, parklets and outdoor trading space; and infrastructure to support and promote active travel. Cumulatively, the schemes create a safer, more accessible, and enhanced environment for the pedestrian and shopper in light of the Covid-19 pandemic.

6.12 Future Retail Development

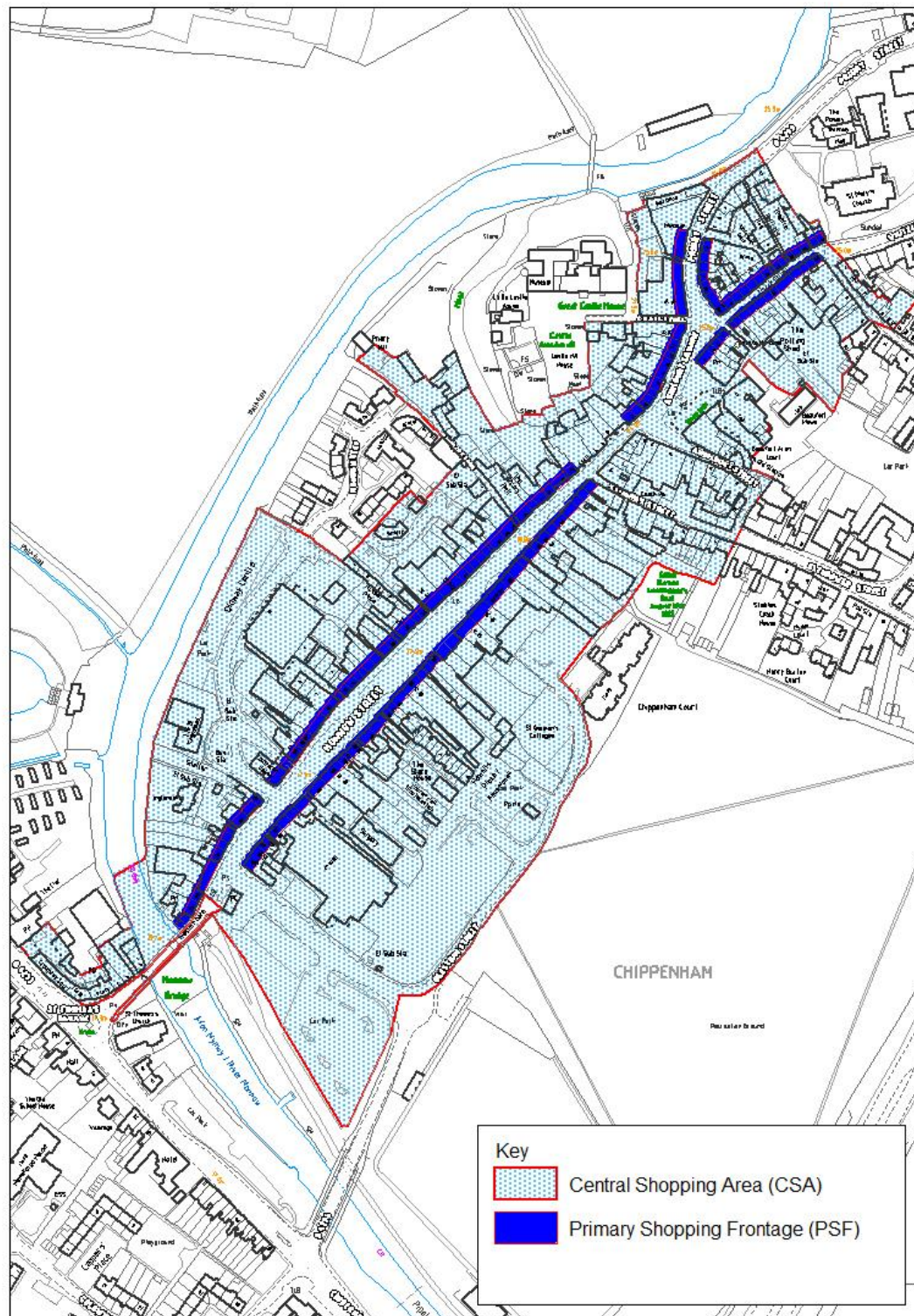
6.12.1 At the time of writing this report there are no proposed retail developments with either outline or full planning permission within the CSA of Chepstow.

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 two in Agincourt Square outside the Shire Hall on a Friday and 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 2021 was £42,072 relative to £43,266 for the county as a whole, and £34,700 for Wales. Out of the households in the Monmouth catchment area, 18.4% are below 50% of the median income for the UK, and 24.8% below 60%. This compares to 17.3% and 23.4% respectively for Monmouthshire, and 26.1% and 34% for Wales as a whole (Appendix B).

7.3 Diversity of Uses

The results of the 2021 survey record an increase in the number of comparison outlets and a decrease in the number of service outlets. This counters the results seen in the other market towns of Abergavenny and Chepstow. The number of convenience outlets also reduced marginally and in 2021 represented 7.5% of all outlets where comparison outlets represented 41.7% and service outlets 35.3%. The proportion of service outlets in the Monmouth CSA in 2021 was the lowest of all centres surveyed. However, of the three market towns, Monmouth has the highest proportion of convenience outlets at 7.5% despite the marginal decline recorded in 2021. Equally, despite general decline over the past 10 years and unlike the other market towns, in 2021, the largest proportion of outlets within the Monmouth CSA was accounted for by comparison outlets, however, in both Abergavenny and Chepstow the largest proportion was service outlets. Comparatively, the number and proportion of service outlets in the Monmouth CSA is at its lowest since the early 2010s.

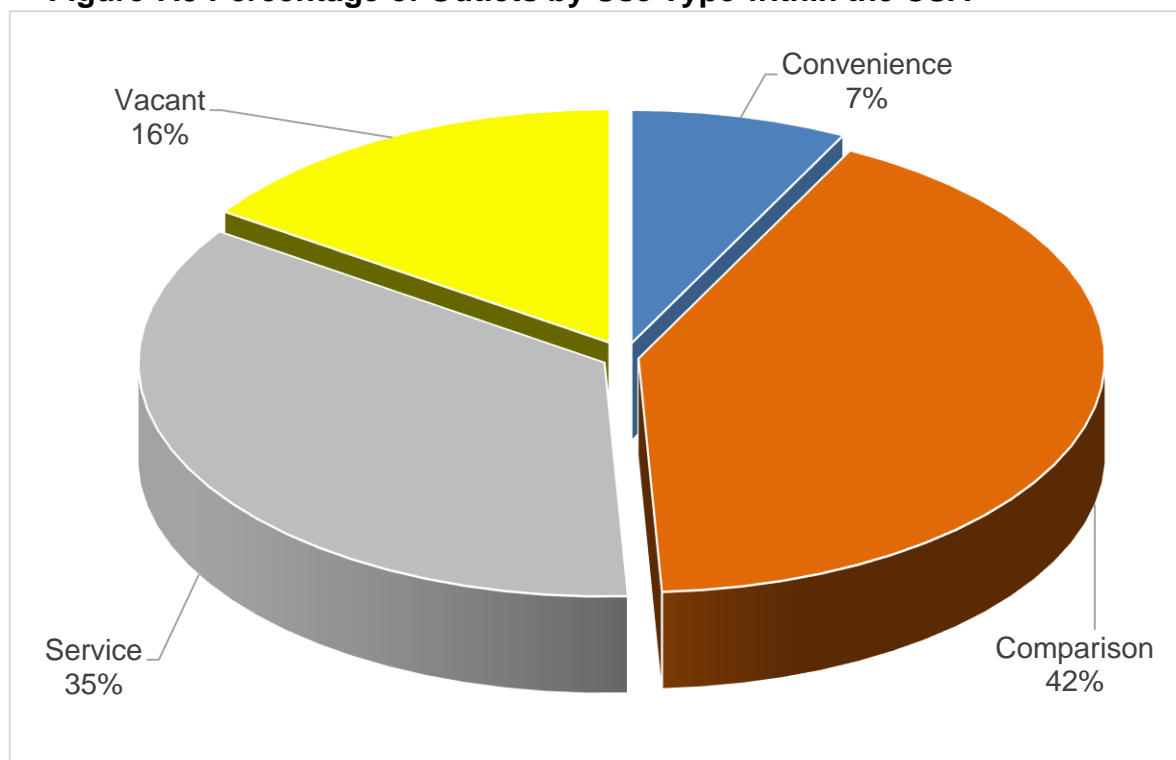
Figure 7.2 Number of Outlets within the CSA by Use Type over Time

	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
2021	14	7.5	78	41.7	66	35.3

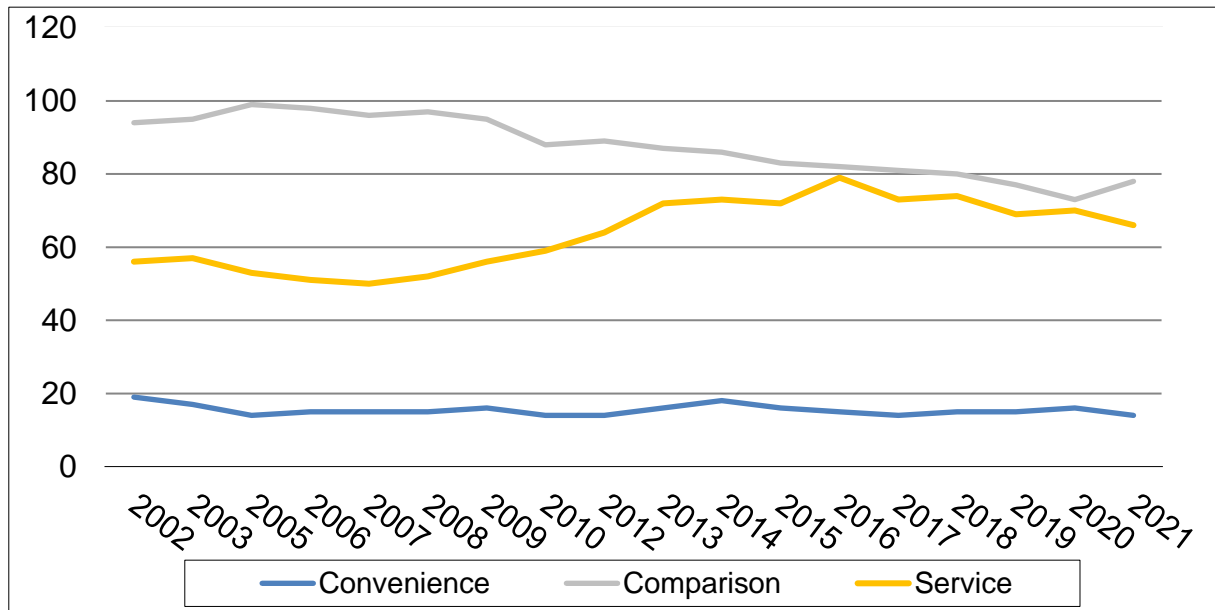
Note: Percentages include vacant units which are dealt with separately in section 7.6

Figure 7.3 Percentage of Outlets by Use Type within the CSA



7.3.2 A comparison of surveys over time indicates 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. However, in 2021, the number of service outlets decreased whilst the number of comparison outlets increased, increasing the difference, after it fell in 2020.

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.

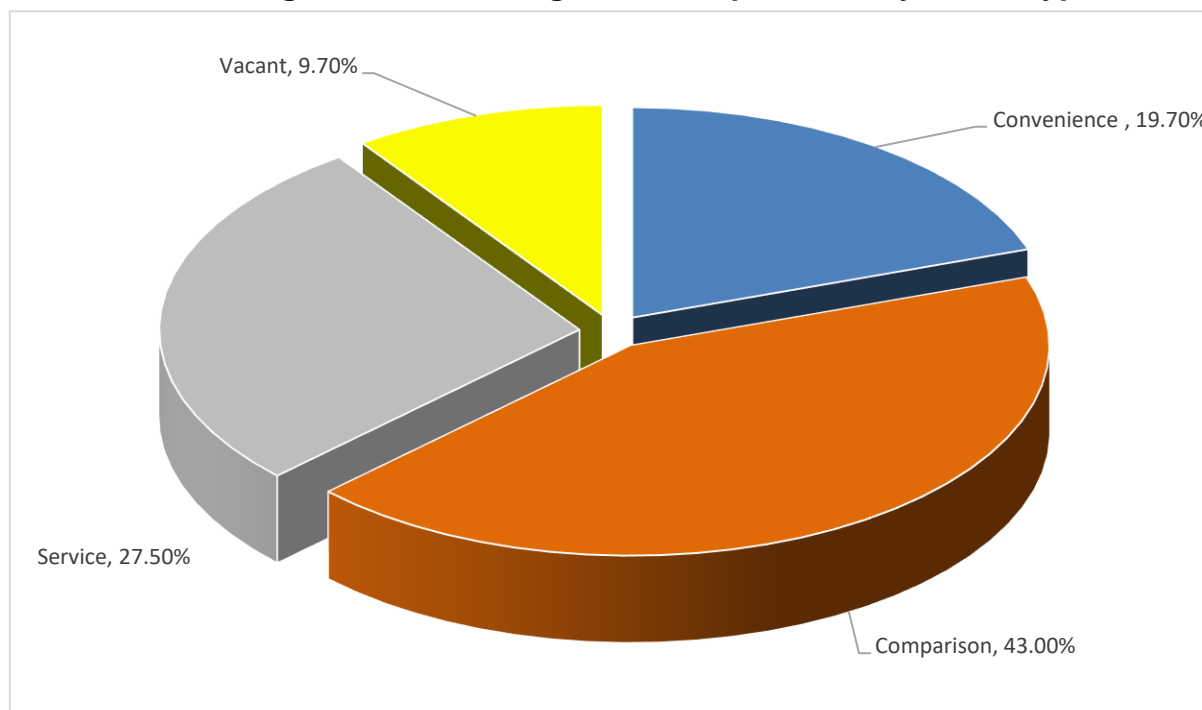
Figure 7.5 Percentage over Time of Floorspace Use within the CSA

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
2021	43	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 just under 19,500m² in 2021, with comparison floorspace accounting for 43%, 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 increased marginally to levels previously seen in 2019. Vacant floorspace has decreased by 0.7% on the previous survey despite their number remaining the same and reflects that some vacant outlets in the 2020 survey have since become occupied, however, some new vacancies were recorded as part of the 2021 survey. Convenience uses still account for one fifth of retail floor space but only represent 7.5% 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 2021. This reflects that there are relatively few convenience uses within the CSA, but that these occupy reasonably large premises.

7.3.6 In addition to the retail and service uses, the town centre contains a number of important non-retail uses including, the Town 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 2021 survey was as follows:

*Overmonnow - Yummies Takeaway
The Albion Off-License*

Wyesham - McColls General Stores & Post Office

- 7.3.7 A 1286m² Lidl foodstore also began trading in 2008, this is located in Wyesham at the junction of Redbrook Road and Staunton Road.

- 7.3.8 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 veterinary practice.

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 over 17% of all 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 and 2 bakeries. However, the 2021 survey noted that premises on Church Street occupied by an independent greengrocer for a sustained period were now vacant. The comparison sector also features several national retailers including Home Bargains, White Stuff, Joules, Fat Face, M&Co 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. The premises occupied by Subway on Monnow Street in the 2019 survey was vacant at the time of the survey in 2020 and 2021.

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
2021	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. The 2021 survey noted that a new chain coffee shop had opened in the premises previously occupied by Edinburgh Woollen Mill. The same chain, 'Coffi Lab', had also opened in Abergavenny at the time of the 2021 survey. Figure 7.7 indicates that the representation of national retailers has remained relatively stable since 2016.

7.4.3 In 2021 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 or so 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 6 units including a Somerfield (then Budgens, and now Home Bargains) store was completed in 1988. The Beaufort Arms Court development

provided 7 small units aimed at specialist retailers. Whilst one of the units in this development was vacant at the time of the 2021 survey, this was less than in the 2020 survey where two vacancies were recorded.

- 7.5.2 The information available on retailer demand and intentions to change representation in Monmouth is limited. Previous surveys have noted the relocation of premises within the CSA, however, the 2021 survey highlights some long-standing vacancies which are discussed further below. Whilst there are some long-standing vacancies, the most recent survey notes, premises previously occupied by Edinburgh Woollen Mill had become occupied by a chain coffee store and premises once occupied by the 'Mind' charity shop, that have been vacant for the past couple of surveys were occupied by an independent interior design store. This has undoubtedly increased the attractiveness and vitality of this part of the CSA and Monnow Street PSF, where both units are located towards the Monnow Bridge end of Monnow Street and more or less opposite each other. However, two premises further down the street also opposite each other remain vacant and have been for at least 2 surveys. In relatively recent years, the likes of Natwest, Subway and Oasis Hair Salon have all vacated premises further up Monnow Street in the relatively concentrated vicinity of the junction with St Johns Street. Other relatively long-standing vacancies include in Agincourt Square at premises once occupied by 'Santander', 'Ruby Tuesday's', 'Shirtbox' and 'The Square' as well as the original 'Specsavers' and 'Bella Couture' premises on Monnow Street. However, stores such as Mountain Warehouse 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, Pizza Express, Coffi Lab and Mountain Warehouse 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. More recently, Home Bargains have also occupied premises off Monnow Street in the Oldway Centre.
- 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 since 2018 and the 2021 survey recorded 29 vacant units representing 15.5% of all units within the CSA. Whilst the number remains the same as in the 2020 survey the overall vacancy in 2021 is the highest on record and may in part reflect the impact of the pandemic on the high street and that Monmouth may not have recovered from the pandemic and associated restrictions as well as the other market towns of Abergavenny or Chepstow. It may also reflect that many premises have been vacant for a sustained period within the Monmouth CSA, as discussed at paragraph 7.5.2. In 2021, Monmouth had the highest overall vacancy of all centres surveyed.

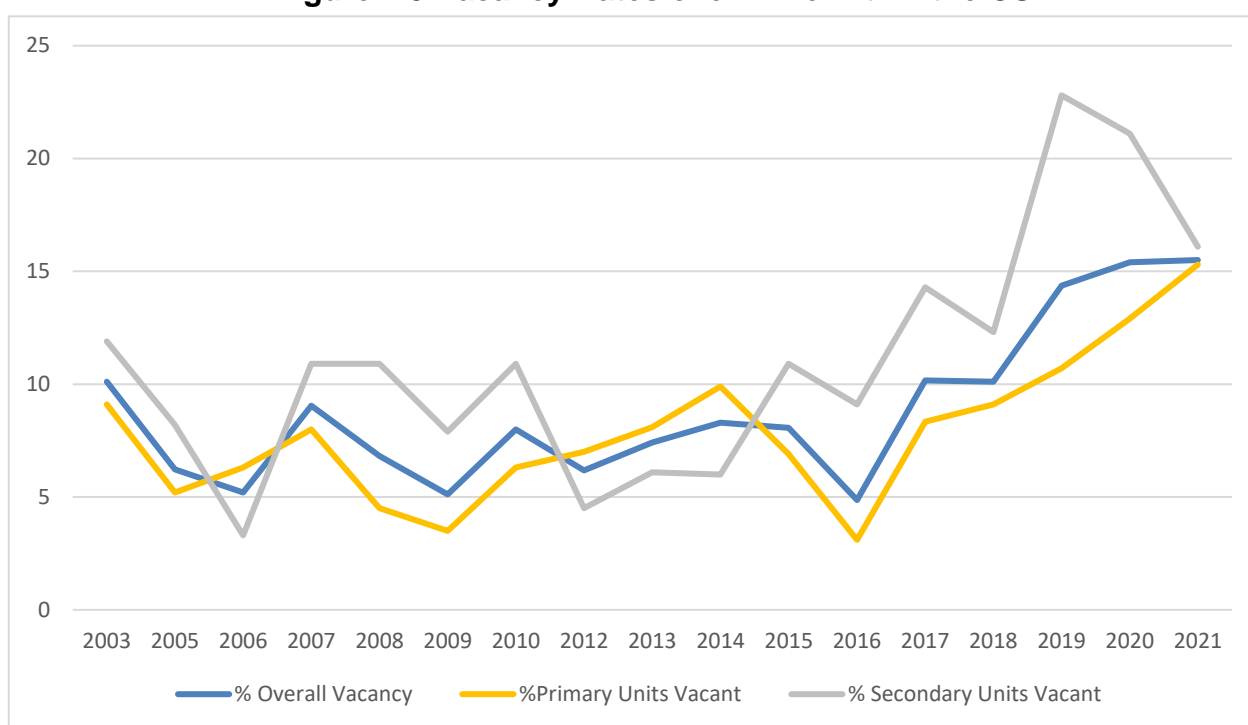
Figure 7.8 Number of Vacant Units Over Time within the CSA

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
2021	29	15.5	15.3	16.1

7.6.4 Since 2017, Monmouth CSA has sustained a relatively high number of vacant units, particularly in the last two surveys in 2020 and 2021. Of the three market towns Monmouth has the highest overall vacancy rate by a relatively substantial margin: Chepstow (11.4%) and Abergavenny

(3.6%). In 2021 there was a notable increase of 2.4% in the proportion of vacant units located on primary frontages which stood at 15.3%, the highest on record. In contrast, the proportion in secondary frontages fell by 5%. As well as some of the long-standing vacancies discussed at paragraph 7.5.2, new vacancies on primary shopping frontages in the 2021 survey included a barbers in Agincourt square and a barber and greengrocer on Church Street.

Figure 7.9 Vacancy Rates over Time within the CSA



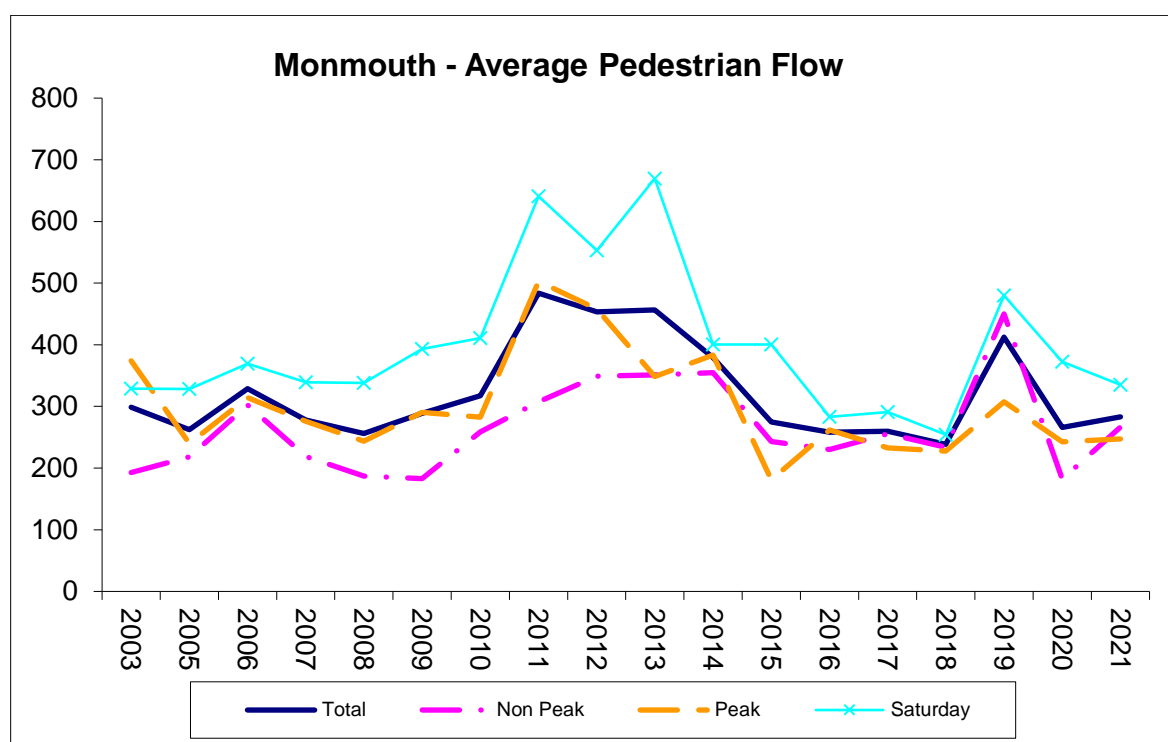
7.7 Pedestrian Flows

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), Oldway Centre (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 2003-2021 period. Despite declining in 2014 and 2015, levels then stabilised before 2019, where the footfall survey recorded a sharp increase across all counts. In 2020 footfall flow fell again which was likely due to the impact of the pandemic and associated restrictions. The decline in footfall flows in 2020 was experience across all town centres in Monmouthshire. However, the 2021 footfall survey indicates an increase in all average flows with the exception of Saturday flow. Whilst the increases are only marginal, they may in part reflect the impact of removing restrictions associated with the Covid-19 pandemic and the popularity of the Monmouth CSA to the surrounding catchment, as well as the ambition of consumers to resume some form of normality.

7.7.3 Whilst a large proportion of pedestrian movement in 2021 was between 11am-2pm on peak and non-peak days, there is a wider distribution of higher counts across all five time periods in Monmouth. This may be due to increased working at home and therefore a reduction in town centre footfall over the lunch hour. The distribution of higher counts across the day is particularly noticeable on the Saturday and may reflect the popularity of Monmouth to tourists who visit throughout the day and increased resident visits. The areas of the Central Shopping Area with the highest pedestrian footfall were the entrance to the Oldway Centre, Church Street, Waitrose and Priory Street. The high counts at the Oldway Centre suggest that Home Bargains, now well established, has been a popular addition to the CSA and that people may be using the associated car park. Despite the decrease since 2020, the highest average pedestrian flow in 2021 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 5 fairly central car parks not including the provision on Monnow Street. The 5 central car parks provide 402 spaces of which 38 are disabled spaces

with 4 electric vehicle charging spaces available at the Glendower Street car park. It appeared that the car parks within the town were popular and well used at the time of the 2021 survey. 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 provide 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 provide 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 at the time of the 2021 retail survey.

7.10 Household Survey

7.10.1 The Council have conducted a series of household surveys over the past 25 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 in 2009 as part of a larger Retail and Leisure Study which was undertaken as a background study for the Local Development Plan. The survey was undertaken again 2015 and most recently in early 2022.

7.10.2 In January 2022; 1,000 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 2022 survey just under two thirds do their main food shopping once a week or more often, this falls to 55% amongst respondents in the Monmouth catchment area.

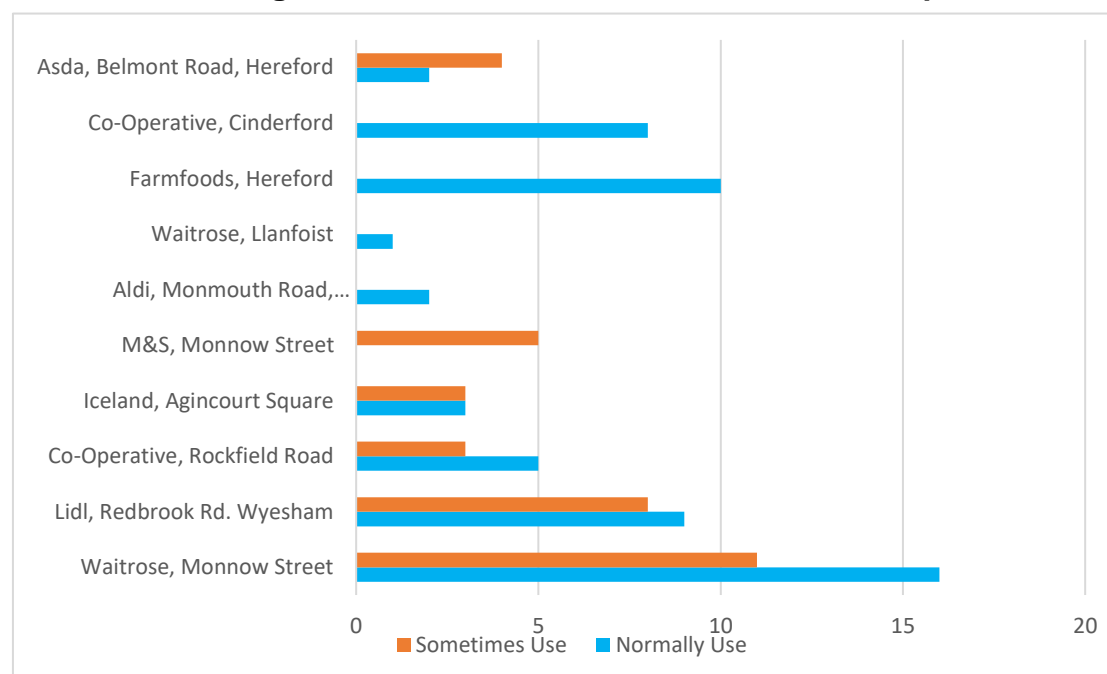
7.10.5 Of those interviewed in the Monmouth zone 33% said they undertake their main convenience shopping in Monmouth, this is a 28% decrease on the previous survey and lower than for either Abergavenny or Chepstow. The most noticeable recent change is the high percentage of respondents (52%) who are undertaking their main food shop outside of Monmouthshire, which has increased 22% since 2015. This reflects the location of the town and access to nearby Hereford and Ross On Wye amongst other locations. Within the town, the Waitrose on Monnow Street has the largest proportion (16%) followed by the Lidl in Wyesham (9%), however both stores have seen an considerable reduction in their proportion since 2015.

Figure 7.11 Main Convenience Shopping Outlet

Outlet (%)	1997	2006	2009	2015	2022
Waitrose	35	41	31	26	16
Home Bargains (Co-operative – 2018) (Somerfield – 2006)	24	27	12	10	0
Kwiksave	13	-	-	-	-
Lidl, Wyesham	-	-	8	21	9
Marks & Spencer	-	1	1	1	0
Iceland	-	-	1	2	3
Co-operative Rockfield Road	-	-	-	-	5
Local Shops	2	2	1	1	0
Total Monmouth	74	71	54	61	33
Other Monmouthshire	8	9	4	3	6
Outside County	18	16	42	30	52
Ross-on-Wye	7	7	9	9	3
Newport	2	2	2	5	1
Hereford	2	3	4	3	27
Internet	-	4	-	6	9

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 (16%), The Lidl store in Wyesham (9%) and the Co-operative on Rockfield Road (5%) have the largest share. However as above, these shares have decreased substantially.

Figure 7.12 Stores Visited for Main Food Shop



7.10.7 Of those interviewed in the Monmouth zone 27% 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. In terms of top up shopping it is the Co-operative on the Rockfield Road that has the largest share, followed by Waitrose, Monnow Street and then Lidl in Wyesham. The percentage of interviewees who do their top-up shop at local stores and neighbourhood centres has decreased considerably reflecting the large increase in those undertaking top up shopping outside the County.

Figure 7.13 Top up Convenience Shopping Outlet

Outlet (%)	1997	2006	2009	2015	2022
Local Shops	34	12	8	11	1
Waitrose	24	36	17	26	6
Home Bargains (Co-operative – 2018) (Somerfield – 2006)	24	27	7	12	1
Co-operative, Rockfield Road	-	-	-	-	10
Lidl, Wyesham	-	-	5	14	3
Marks & Spencer	-	5	4	5	3
Kwiksave	6	-	-	-	-

Iceland	-	-	2	4	1
Spar, Kings Fee	-	-	-	-	2
Total Monmouth	88	80	43	72	27
Other Monmouthshire	4	8	7	9	5
Outside County	8	12	50	19	66
Internet	-	-	-	-	2

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
1 st choice clothes, footwear and other fashion goods	13	3	21	63 1. Hereford - 32% 2. Bristol Cribbs Causeway – 14%
2 nd choice clothes, footwear and other fashion goods	8	2	17	73 =1. Bristol City Centre/Bristol Cribbs Causeway – 11%
Books, music, DVDs and toys	18	3	40	39 1. Hereford – 16% 2. Bristol Cribbs Causeway - 13%
Chemist goods, toiletries and cosmetics	34	7	5	54 1. Hereford - 26% 2. Bristol Cribbs Causeway – 11%
Furniture, carpets and soft furnishings	19	1	20	60 1. Hereford - 16% 2. Newport Retail Park - 13%

%	Monmouth	Other Mon'shire	Internet	Outside County/Other
Household goods, glass, china and tableware	23	3	36	38 1. Hereford - 17% 2. Bristol Cribbs Causeway - 11%
Electrical goods	2	0	41	57 1. Newport Retail Park - 22% 2. Hereford – 11%
DIY, hardware and gardening goods	30	6	6	58 1. Hereford - 28% 2. Bristol Cribbs Causeway – 9%
Banking, financial and legal services	23	3	26	48 1. Hereford – 26% 2. Bristol Cribbs Causeway – 9%

7.10.9 As with convenience goods, 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. Since the 2015 survey, there has been an increase in the proportion of respondents in the Monmouth zone shopping online for all goods, and in particular, for clothes footwear and other fashion goods and household goods. The increase in proportion of those shopping online has been seen throughout Monmouthshire and reflects a national trend.

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 19% said they usually went to the Savoy Theatre and Cinema, with 33% using The Loft Cinema, Hereford and 18% the Sherborne Cinema in Gloucester, showing that where there is a local cinema it is reasonably well used.

7.10.12 Respondents were also asked which gym or sports/leisure centre they usually used, 7% of those who use this type of facility said they used the Monmouth Leisure centre, with 5% using facilities elsewhere in the

County. A total of 88% of respondents suggested they use facilities outside the County, with 65% of that in Hereford.

7.10.13 In terms of the respondents use of museums, art galleries and theatres respondents suggested this varied. However, 19% of respondents suggested they normally visit museums in the town with 5% visiting an art gallery in the town and 26% visiting the theatre in Monmouth. Other than this, the most popular destinations for these activities included Cardiff, Hereford and Bristol.

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 Most recently, Monmouthshire County Council, along with Welsh Government funding and Monmouth Town Council have completed a public realm development scheme in Agincourt Square. The work that was completed in the Autumn of 2020 involved the widening and improving of all the paved surfaces, in order to create a safer and more pleasant environment for pedestrians and shoppers.

7.11.4 Monmouthshire County Council has implemented a range of measures through the re-opening town centres project over the past couple of years within the Monmouth CSA. These include the widened pavements on Monnow Street and the associated provision of planters, pods, parklets and outdoor trading space in Monnow Street and Agincourt Square. Cumulatively, the schemes create a safer, more accessible, and enhanced environment for the pedestrian and shopper in light of the Covid-19 pandemic.

7.12 Future Retail Development

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

8 USK

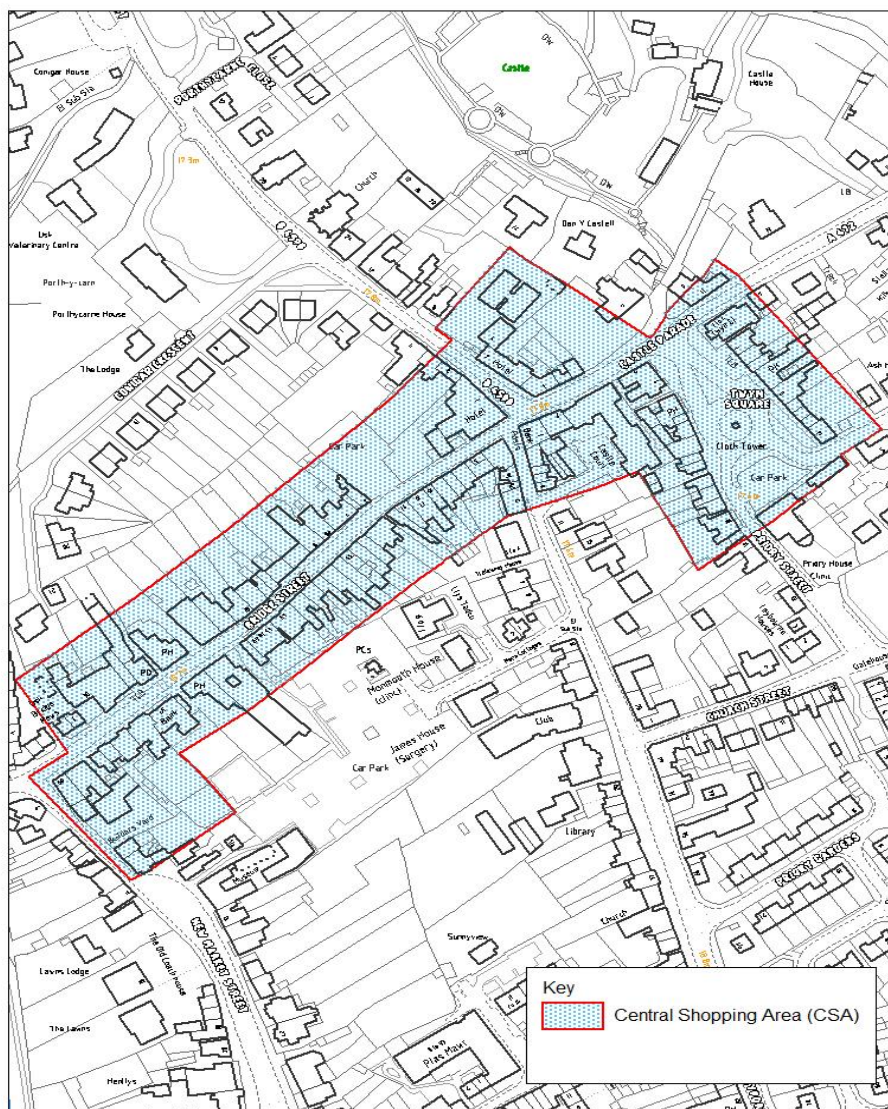
8.1 Background

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 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 2021 was £45,556 relative to £43,266 for the county as a whole, and £34,700 for Wales. Out of the households in the Usk catchment area, 15.5% are below 50% of the median income for the UK, and 21.2% below 60%. This compares to 17.3% and 23.4% respectively for Monmouthshire, and 26.1% and 34% 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 gradually decreasing in the period since their proportion began to rise again in 2018. The 2021 survey reveals that their proportion is 52.5% which is the same as the 2020 survey and over half the outlets within the CSA. The recent rise in the number and proportion of service outlets can be attributed to uses including microbreweries and pubs as well as beauty salons establishing themselves in previously vacant premises within the Usk CSA at the time of the 2020 survey. The number of convenience uses has remained relatively stable since 2017, however this had also marginally increased in 2020 as a result of a new local convenience store opening. At the time of the 2021 survey there were 4 convenience outlets, however their proportion had increased marginally due to changes elsewhere in the CSA. Whilst the number and proportion of comparison goods fell in 2018, it has remained relatively stable since, recording a proportion of 32.2% at the time of the 2021 survey where comparison outlets accounted for just under 1/3 of outlets within the CSA.

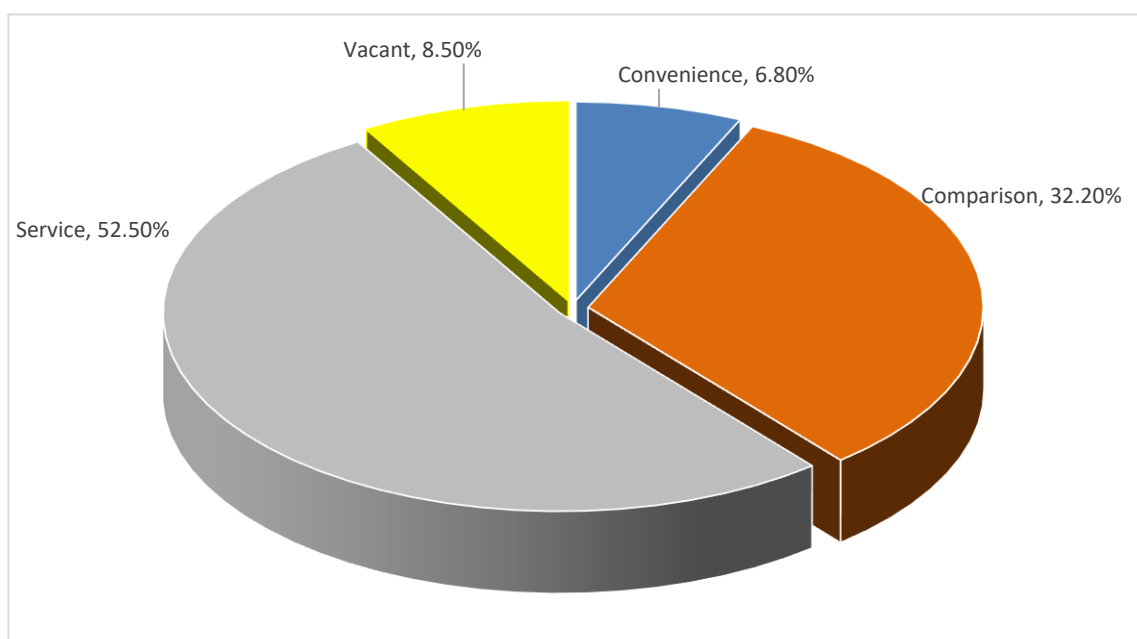
Figure 8.2 Number of Outlets within the CSA by Use Type over Time

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

Year	Comparison No.	Outlets %	Convenience No.	Outlets %	Service No.	Outlets %
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
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
2021	19	32.2	4	6.8	31	52.5

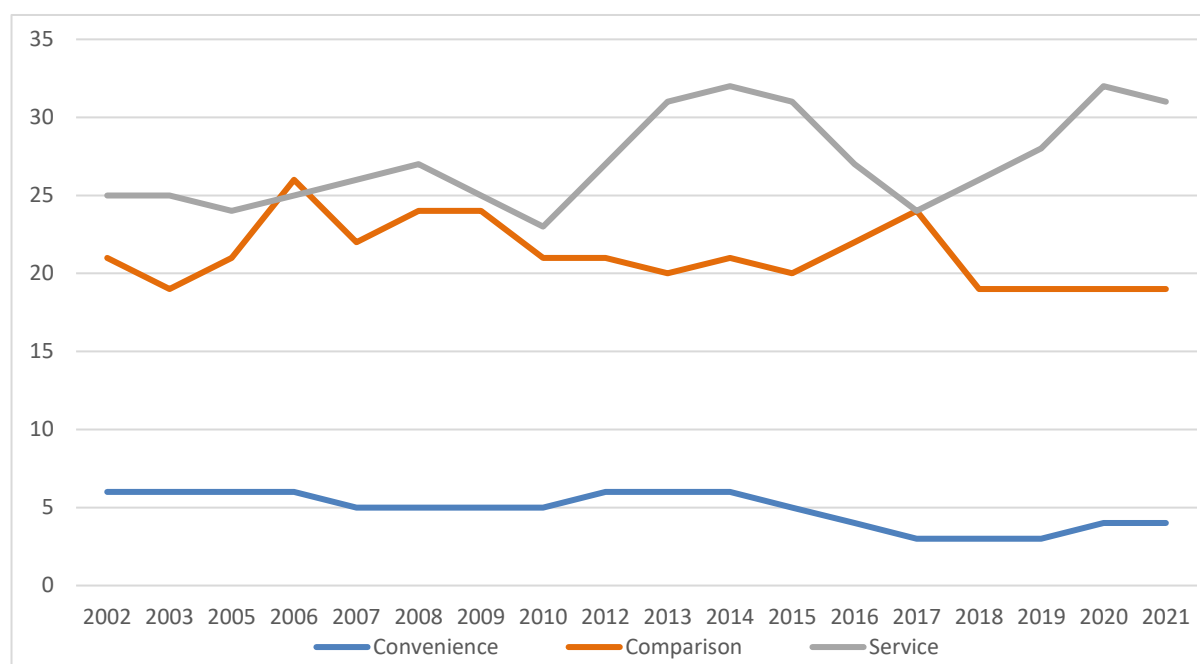
Note: Percentages include vacant units which are dealt with separately in section 8.5

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, however, the 2021 survey records a reduction in this gap where the number of comparison outlets has remained the same and the number of service outlets has declined. However, the decline in the number of service outlets was very marginal and the difference remains evident. The number of convenience outlets has remained relatively stable in comparison since 2015, and whilst lower than the number seen in the early 2010s, the previous survey recorded a marginal increase in their number. Their number remains the same in the 2021 survey.

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.

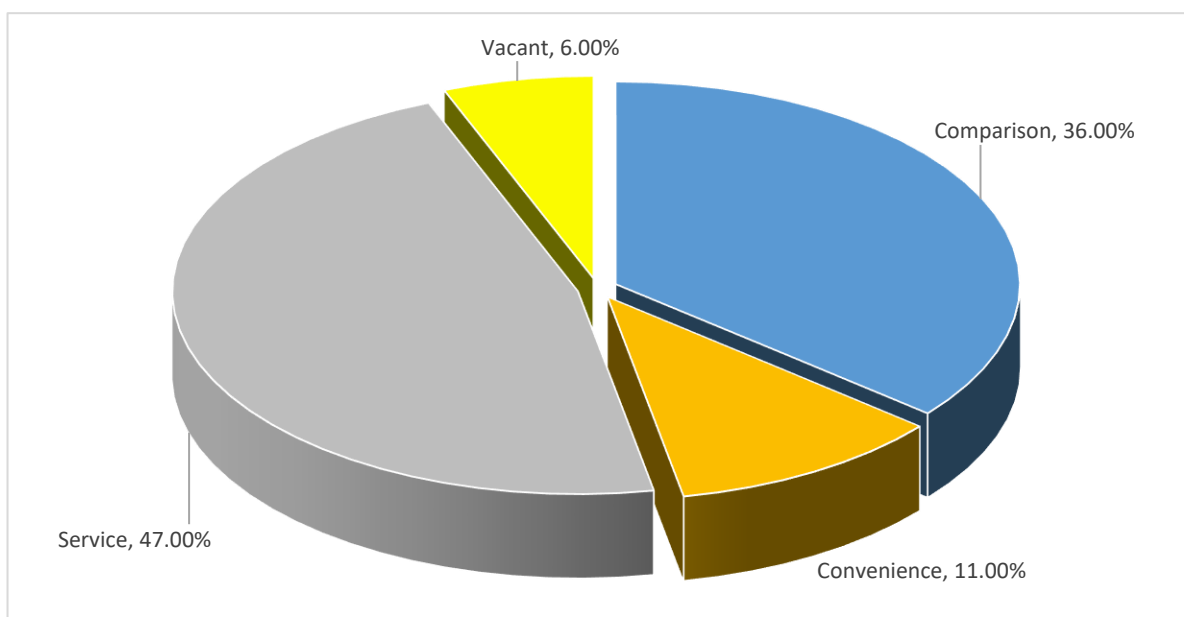
Figure 8.5 Percentage over Time of Floorspace Use within the CSA

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
2021	36	11	47

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 3,500m² within the CSA in 2021 of which comparison outlets account for 36%, convenience 11% and service outlets 47%. The proportion of service floorspace has increased by 10% since 2018 and 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 several 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. The 2021 survey noted that this premises had now changed use and was a Pilates studio. Whilst a longstanding vacant unit had now become occupied, there remains no bank in the Usk CSA. 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 two new microbreweries and pubs had established themselves along with a new beauty salon. However premises off Twyn Square previously in commercial use have now been converted to residential use.

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
2021	5	8.5

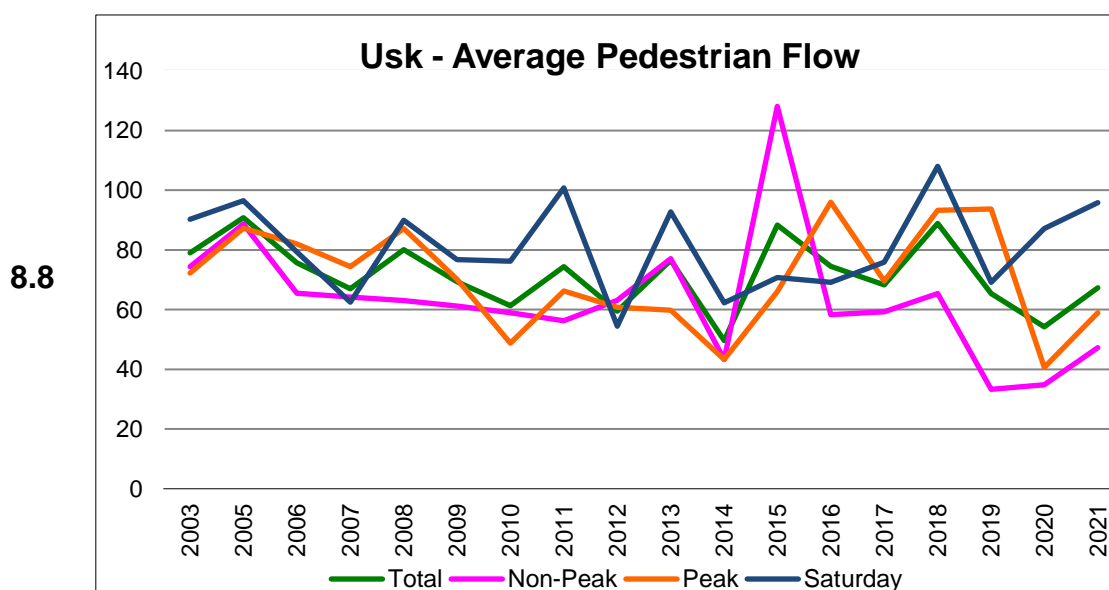
- 8.6.2 Figure 8.7 illustrates the number of vacant units as well as overall vacancy rates over time for Usk. At the time of the most recent survey there were 5 vacant outlets accounting for 8.5% of all outlets within CSA.

- 8.6.3 Encouragingly, the overall vacancy rate has consistently decreased since 2018 and at 8.5% in 2021, is the lowest since 2014. Whilst the decrease in the vacancy rate is marginal and starts from a relatively low base in comparison to other town centres, the decrease reflects that Usk has endured the impacts of the Covid-19 pandemic reasonably well and demonstrates desire to be located in the CSA.

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 now a Pilates studio, Castle Parade, Four Ash Street, Priory Street and outside the Three Salmons Hotel.
- 8.7.2 There has been a lot of fluctuation in all average footfall flows within Usk over the last 10 years. The numbers of pedestrians in Usk is comparatively lower than in other settlements within Monmouthshire where overall average pedestrian flow declined since 2018 to a low in 2020. However, the 2021 survey records an increase in all three average pedestrian flows, which is then reflected in the overall flow, as seen at Figure 8.8. The increase in average pedestrian flow may reflect the impact of removing restrictions associated with the Covid-19 pandemic and the popularity of the Usk CSA to the surrounding catchment, as well as the ambition of consumers to resume some form of normality. Whilst the total, non-peak and peak average flow increases are encouraging they are not to the levels of the early 2000s. However, the Saturday average pedestrian flow has increased for 2 consecutive surveys and in 2021 was similar to levels recorded in the early 2000s and early 2010s.
- 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. Castle Parade also recorded a noticeably high count on the Saturday in 2021 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



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 156 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 appeared to be popular and well used at the time of the 2021 survey.
- 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 25 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 survey was undertaken again 2015 and most recently in early 2022.
- 8.10.2 In January 2022; 1,000 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.

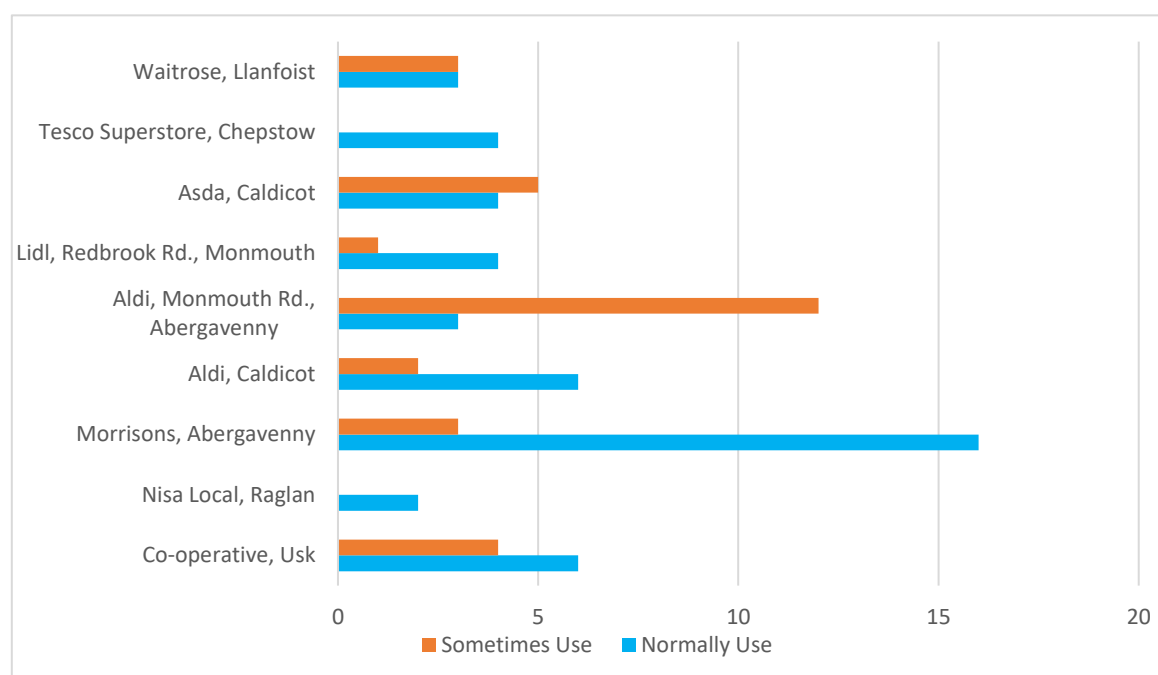
- 8.10.3 All of the household surveys which have been undertaken to feed into the Retail Background Paper follow a broadly similar methodology so that whilst they do not allow for an exact comparison they do give some indication, over time, of changing shopping habits.

Figure 8.9 Main Convenience Shopping Outlet

Outlet (%)	1997	2006	2009	2015	2022
Co-operative, Usk (Spar)	7	14	6	6	6
Waitrose, Monmouth	10	11	12	12	2
Safeway, Abergavenny	6	-	-	-	-
Morrisons, Abergavenny	-	-	-	-	16
Waitrose (Llanfoist) (Safeway – 1997)	4	6	9	6	3
Aldi, Abergavenny	-	-	-	16	3
Lidl, Wyesham	-	-	-	9	4
Nisa, Raglan	1	3	7	1	2
Other Monmouthshire	13	12	11	3	20
Outside County	59	53	55	44	34
Newport	28	13	12	20	4
Cwmbran	26	29	31	7	7
Pontypool	1	8	7	7	12
Internet	-	1	-	6	9

- 8.10.4 Of those interviewed for the 2022 just under two thirds do their main food shopping once a week or more often, for the Usk zone this falls to 54% 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. However, since 2009, the proportion of those carrying out their main convenience shop outside of the County has declined. The 2022 survey records a further decrease of 10%. This may reflect the opening of the Morrisons store in Abergavenny, with a 16% proportion of respondents in the Usk zone carrying out their main convenience shop here.
- 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, 28% of those interviewed in the Usk zone said they do their top-up convenience shopping within the town, with a further 2% doing their top-up shop in Raglan, although this is likely to be those respondents living in that area. Despite decline, 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	2022
Co-operative, Usk (Spar)	40	59	57	43	28
Local Shops	18	9	3	16	7
Nisa, Raglan	15	17	19	26	2
Other Monmouthshire	16	8	11	15	39
Outside County	11	7	10	-	21
Cwmbran	3	5	2	-	2
Newport	3	1	-	-	11
Internet	-	-	-	-	3

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 online or at centres outside of the County. For Usk the main trade draws away from the town for comparison goods are Newport and Cwmbran.

Figure 8.12 Comparison Shopping

%	Usk	Other Mon'shire	Internet	Outside County/Other
1 st choice clothes, footwear and other fashion goods	0	28	21	51 1. Bristol Cribbs Causeway - 8% 2. Cwmbran – 6%
2 nd choice clothes, footwear and other fashion goods	0	19	17	64 1. Newport Retail Park – 10% 2. Newport Town – 6%
Books, music, DVDs and toys	0	41	34	25 1. Cwmbran – 7% 2. Newport Retail Park – 4%
Chemist goods, toiletries and cosmetics	17	46	15	22 1. Hereford – 4% 2. Cwmbran – 3%
Furniture, carpets and soft furnishings	0	23	16	61 1. Newport Retail Park – 13% 2. Hereford – 11%
Household goods, glass, china and tableware	9	24	26	41 1. Bristol Cribbs Causeway – 13% 2. Cwmbran – 10%
Electrical goods	0	9	37	54 1. Newport Retail Park – 11% 3. Cwmbran – 10%
DIY, hardware and gardening goods	27	36	9	28 =1. Hereford/Bristol – 10%

%	Usk	Other Mon'shire	Internet	Outside County/Other
Banking, financial and legal services	13	37	23	27 1. Cwmbran – 5% 2. Newport – 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 clothes, footwear and other fashion goods. Since the 2015 survey, in Usk, there has not been as large increase in the proportion of those shopping online, where some proportions, including electrical goods and books, music, DVDs and toys, actually fell. This may in part reflect the draw of other centres in Monmouthshire as noted in paragraph 8.10.5.

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, 28% said they usually went to the Cineworld at the Newport Retail Park, with 14% using the Riverfront in Newport and 12% the Baker Street Cinema, Abergavenny.

8.10.11 Respondents were also asked which gym or sports/leisure centre they usually used, just under half (47%) 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, 31% would go to Chepstow to visit a museum, 21% would go to Aberdare to visit an art gallery and 36% would go to Aberdare for the theatre. Although the presence of local theatres in Abergavenny and Monmouth means that 21% of respondents would visit one of these theatres.

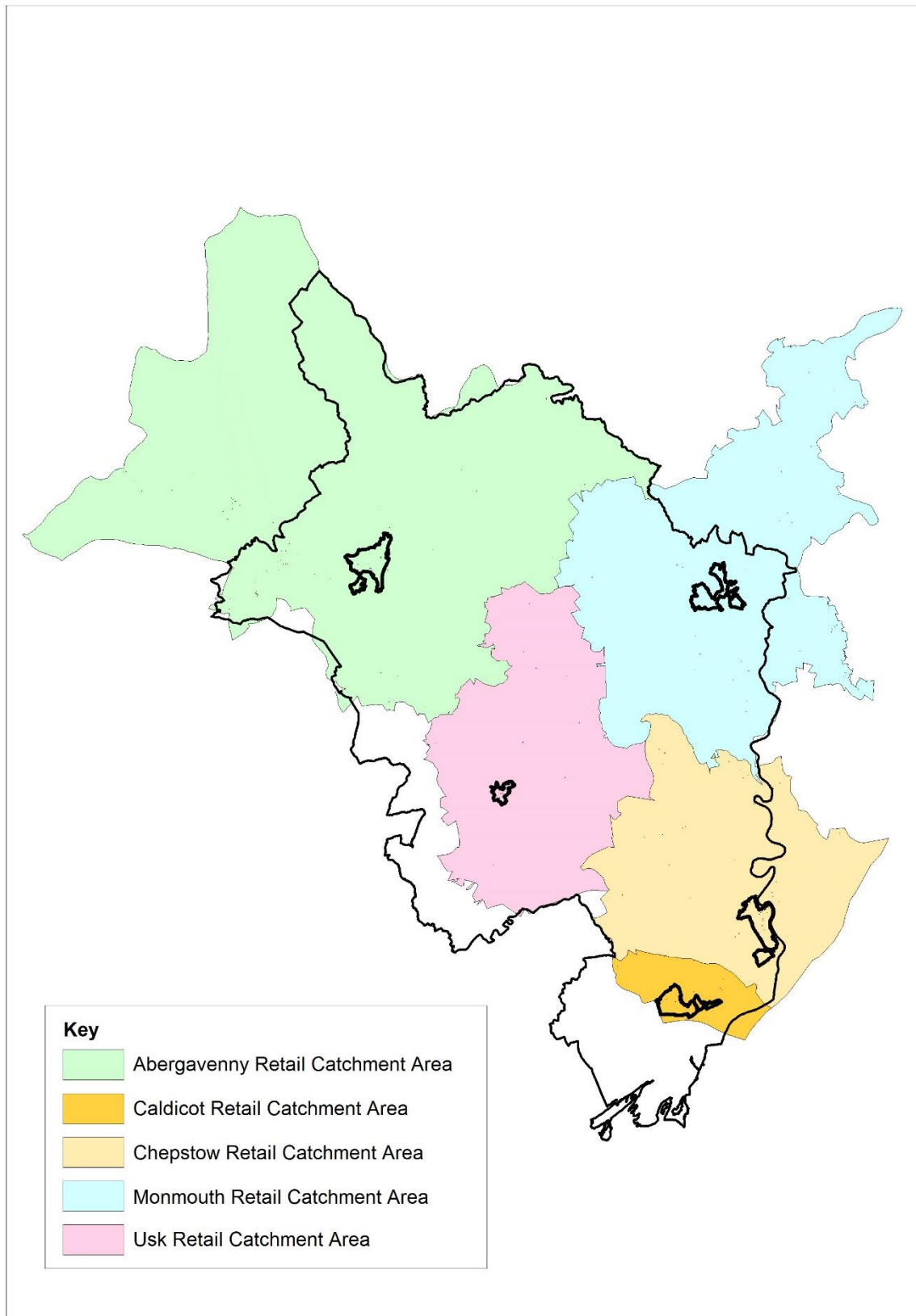
8.11 Future Retail Development

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

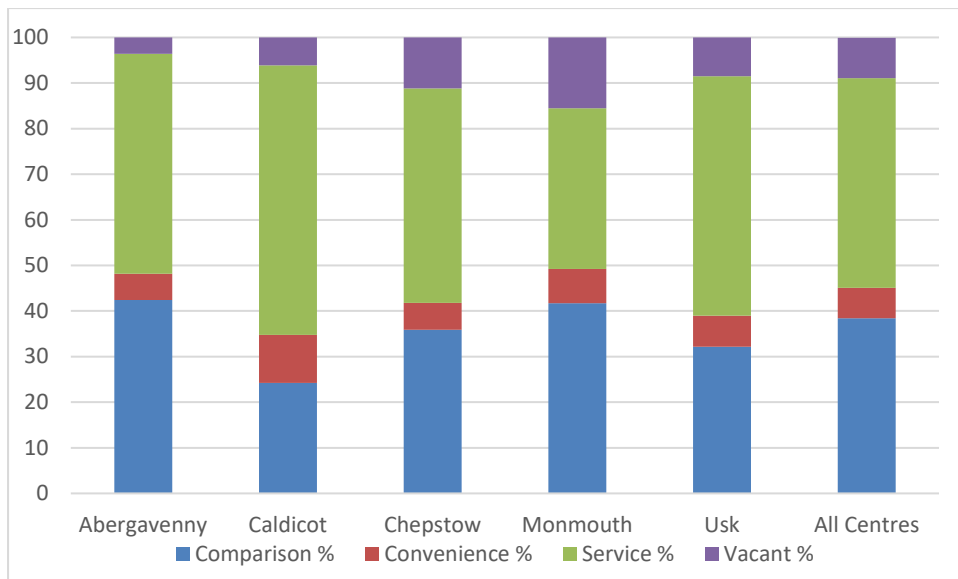


Appendix B – Paycheck Data

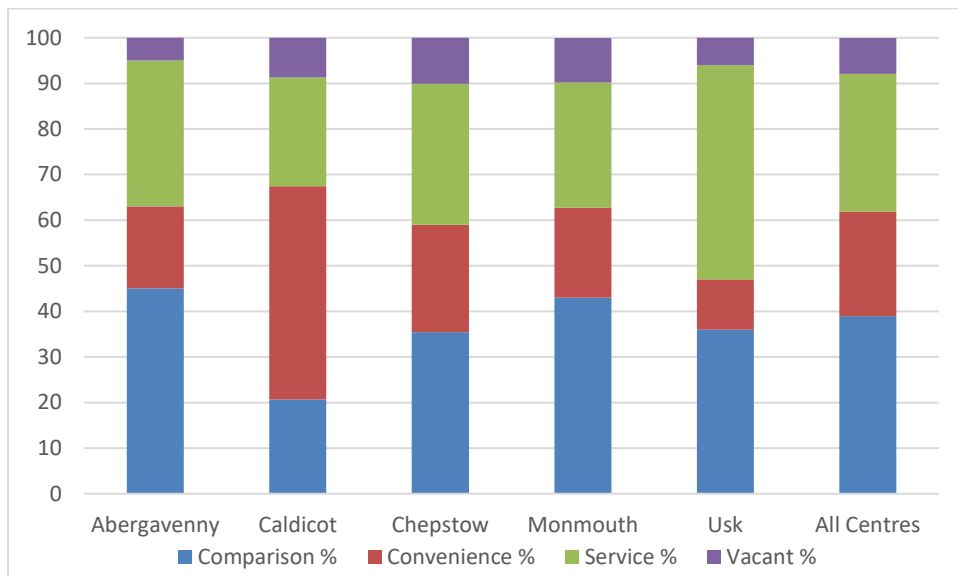
	Mean Income	% Households below 50% of GB Median Income	% Households below 60% of GB Median Income
Abergavenny	£40,924	18.7	25.3
Caldicot	£41,033	18.8	25.4
Chepstow	£46,263	15.3	20.9
Monmouth	£42,072	18.4	24.8
Usk	£45,556	15.5	21.2
Monmouthshire	£43,266	17.3	23.4
Wales	£34,700	26.1	34
GB	£40,452		

Appendix C – Comparison of survey results of main towns

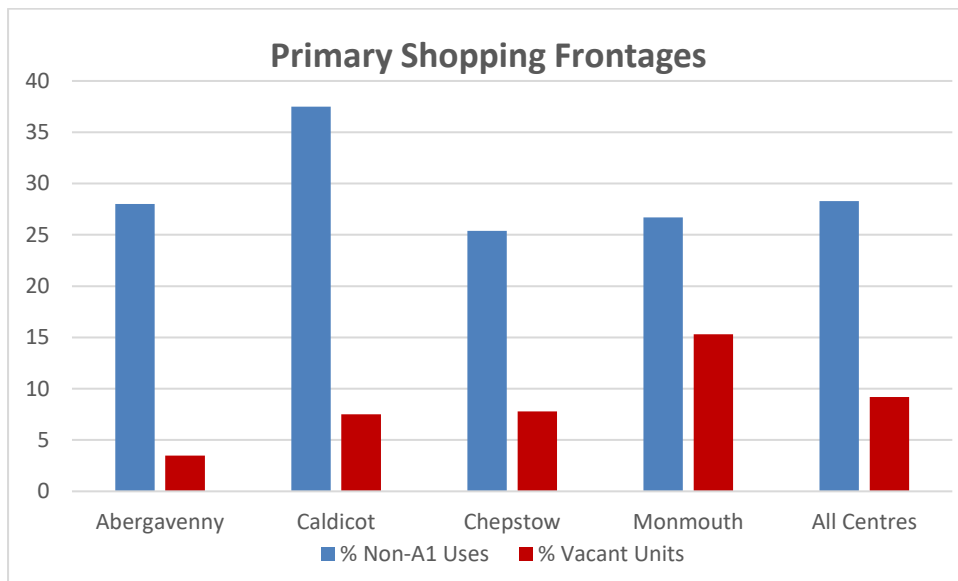
Retail Use - 2021



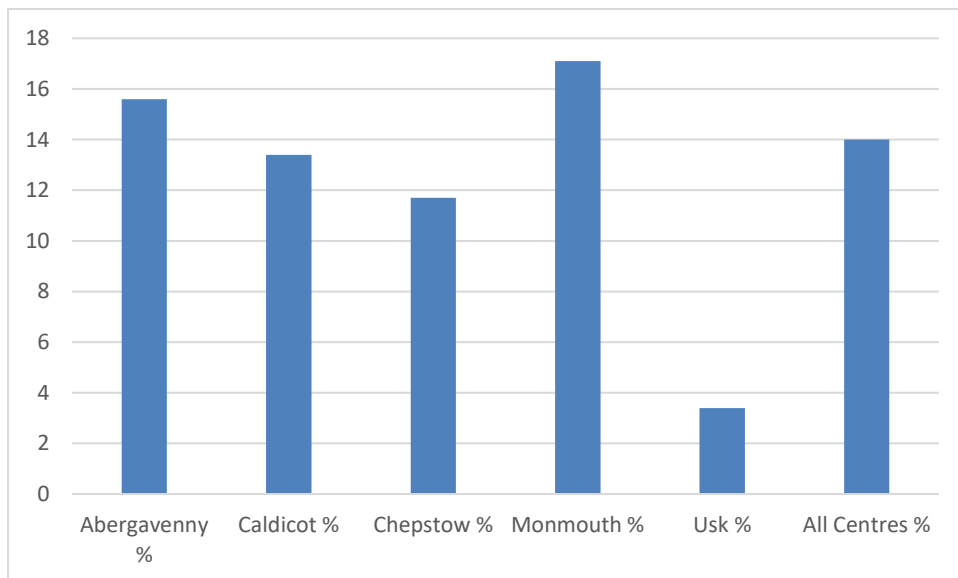
Retail Use – Floorspace - 2021



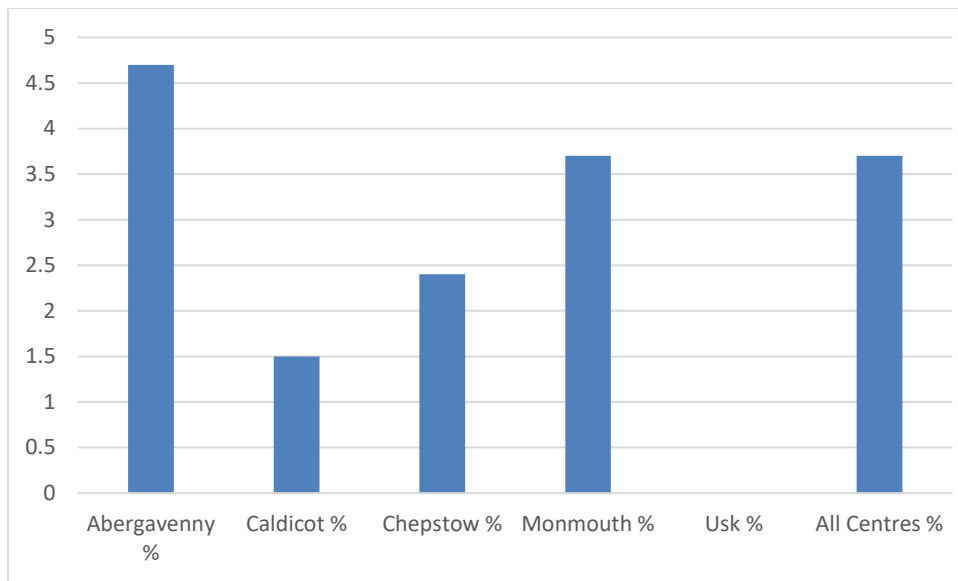
% Non-A1 uses and Vacant Units in Primary Shopping Frontages - 2021



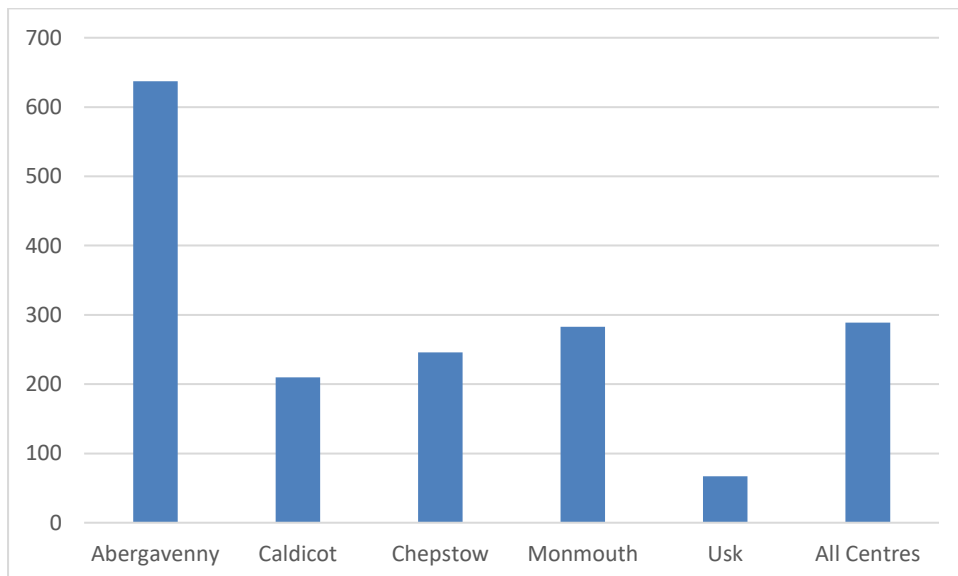
Representation of National Retailers in all Units within the CSA - 2021



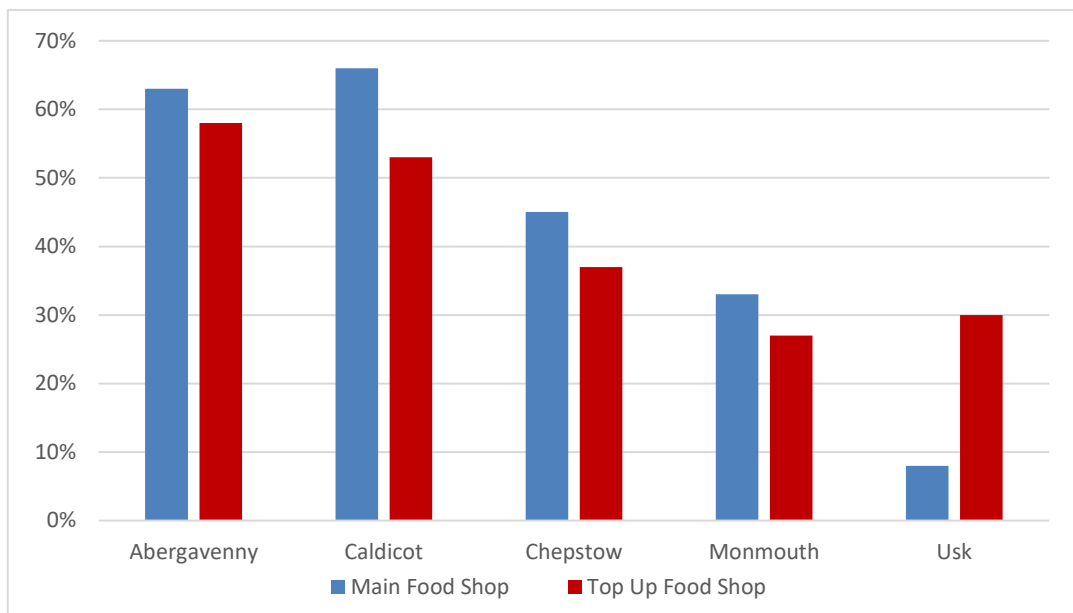
Representation of Charity Shops - 2021



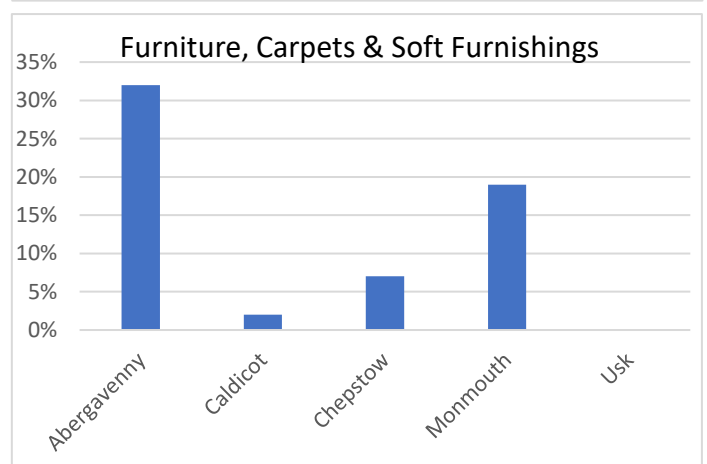
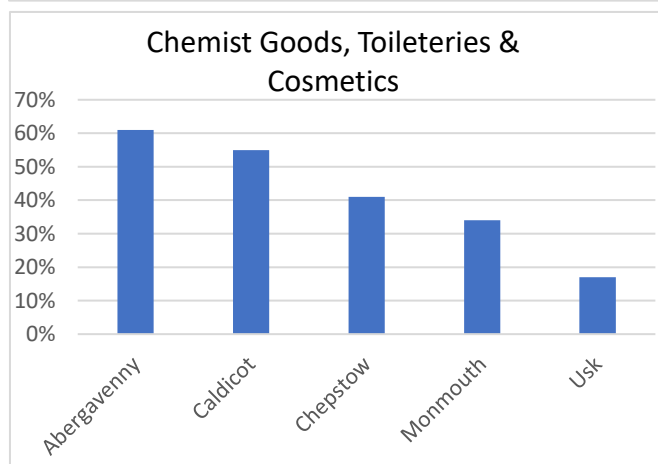
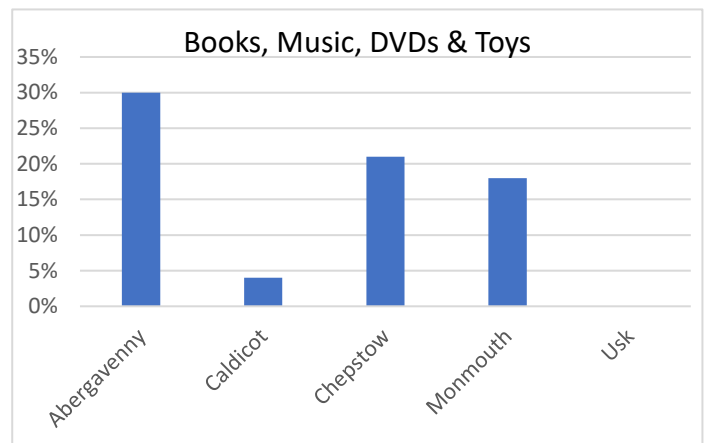
Average hourly footfall – 2021

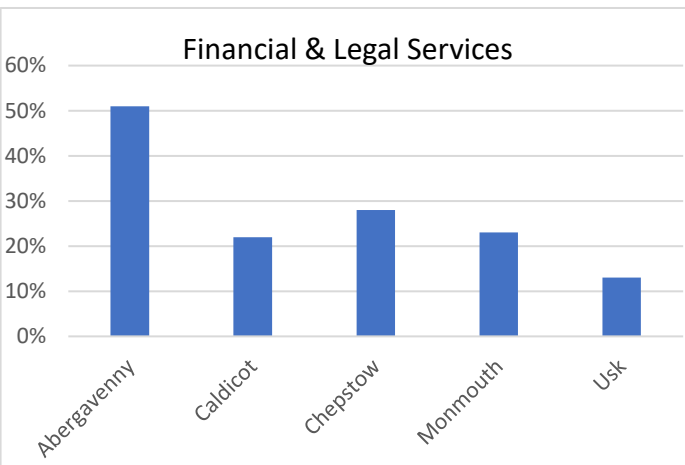
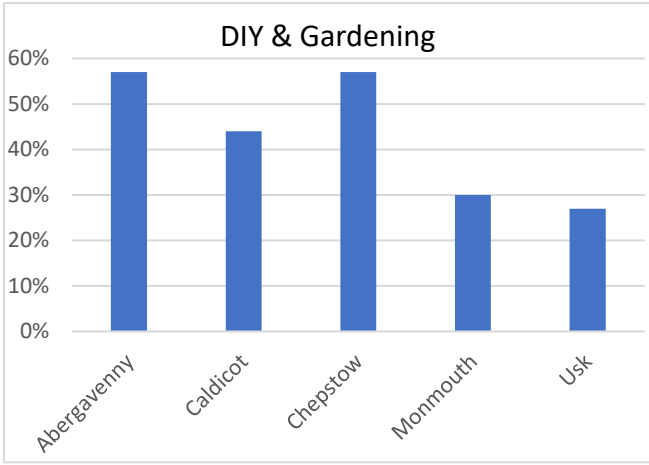
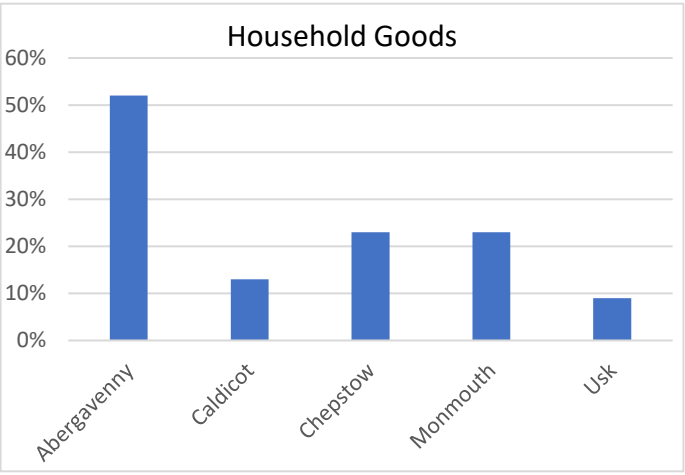
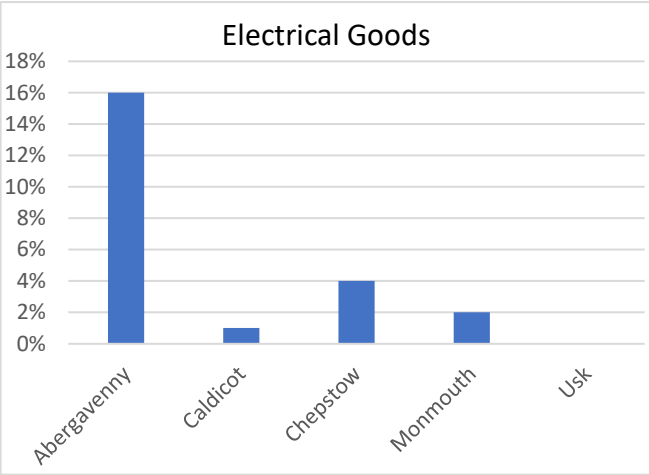


Trade Retention by Town for Convenience Shopping (%)



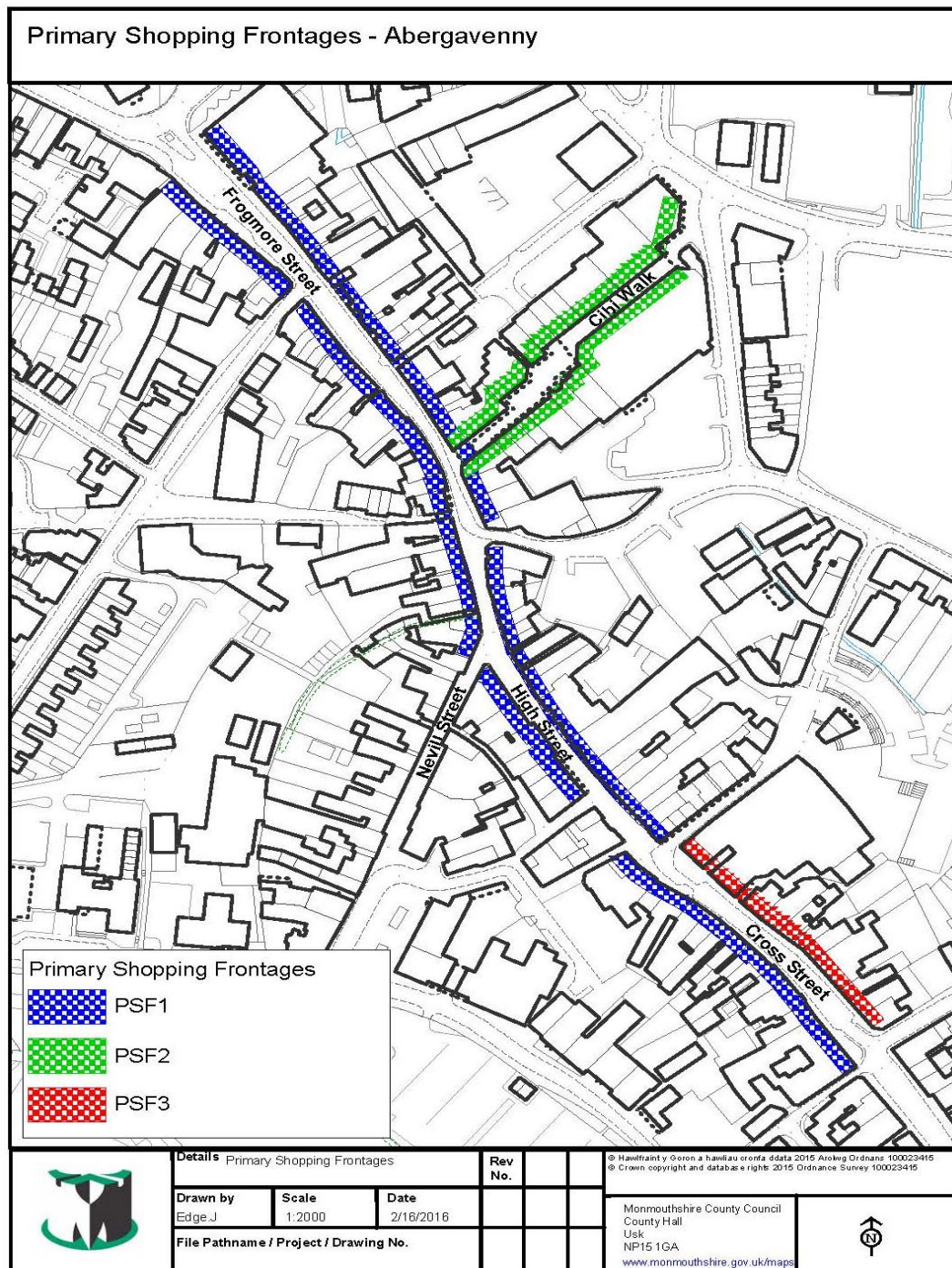
Trade Retention by Town for Comparison Shopping (%)





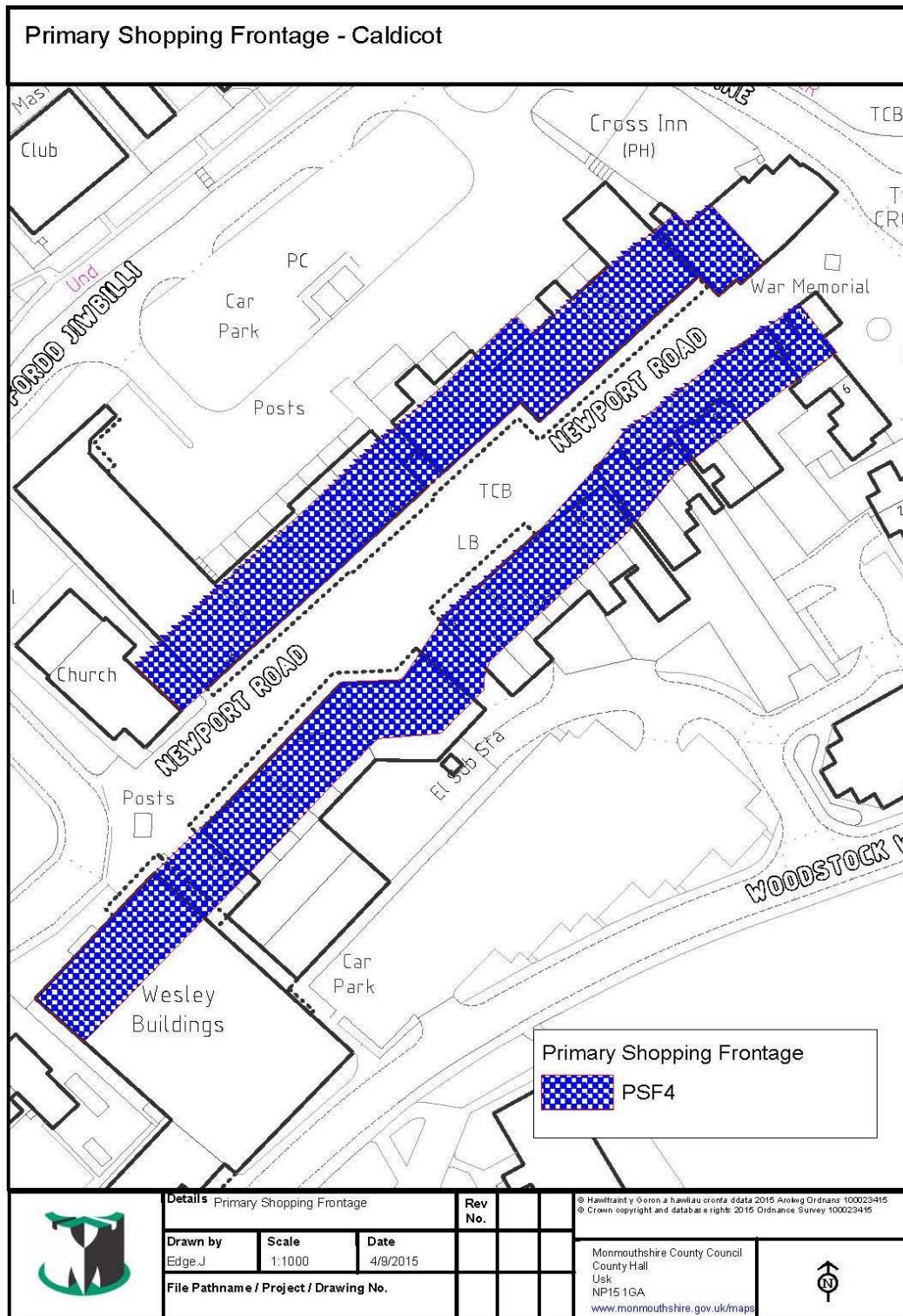
Appendix D: SPG Primary Shopping Frontages and Maximum Thresholds for Non-A1 Uses

Abergavenny



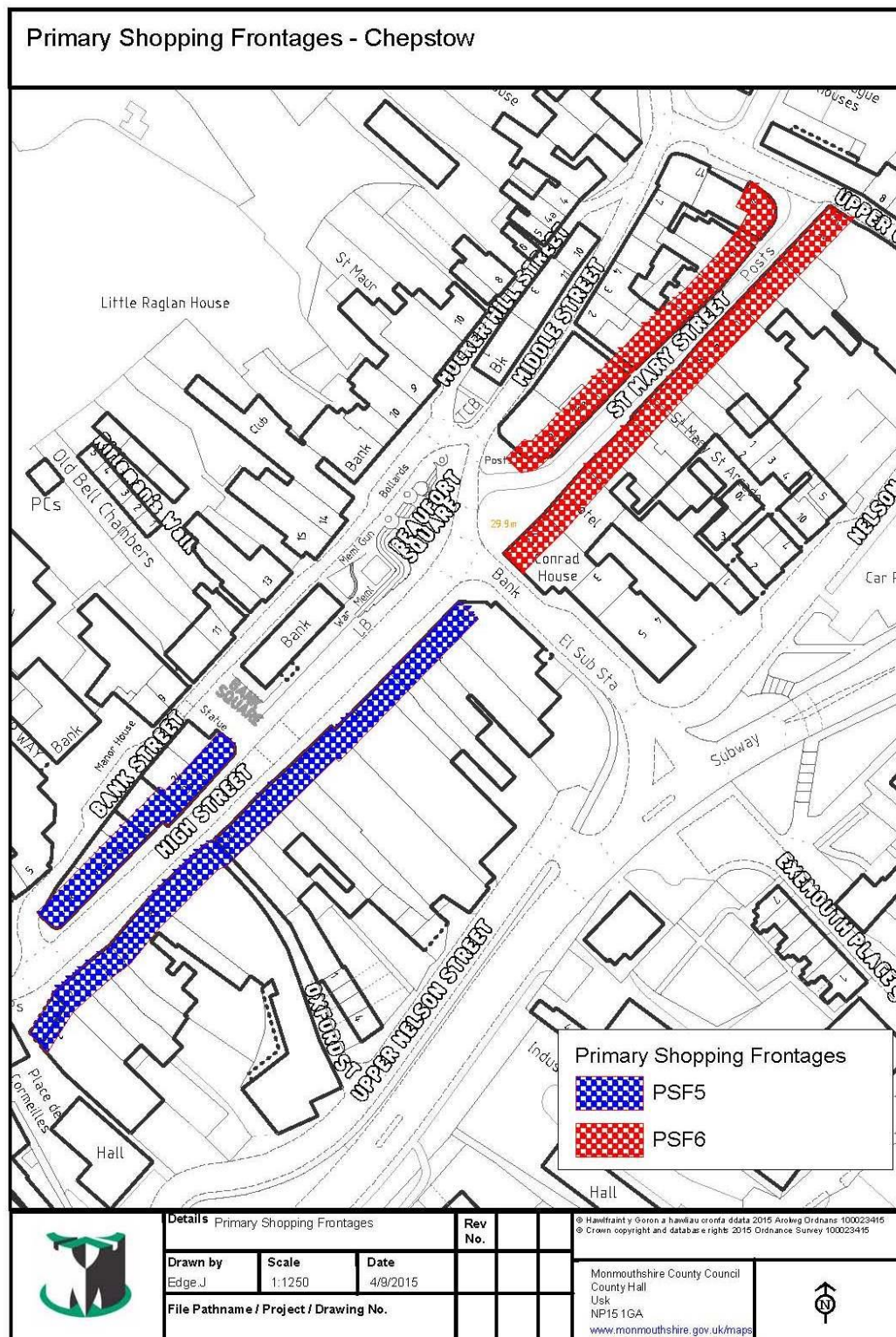
Primary Shopping Frontage		Maximum % of Non-A1 Units
PSF1	Cross Street, High Street & Frogmore Street	25%
PSF2	Cibi Walk	0%
PSF3	Cross Street (51-60 & Town Hall)	45%

Caldicot



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

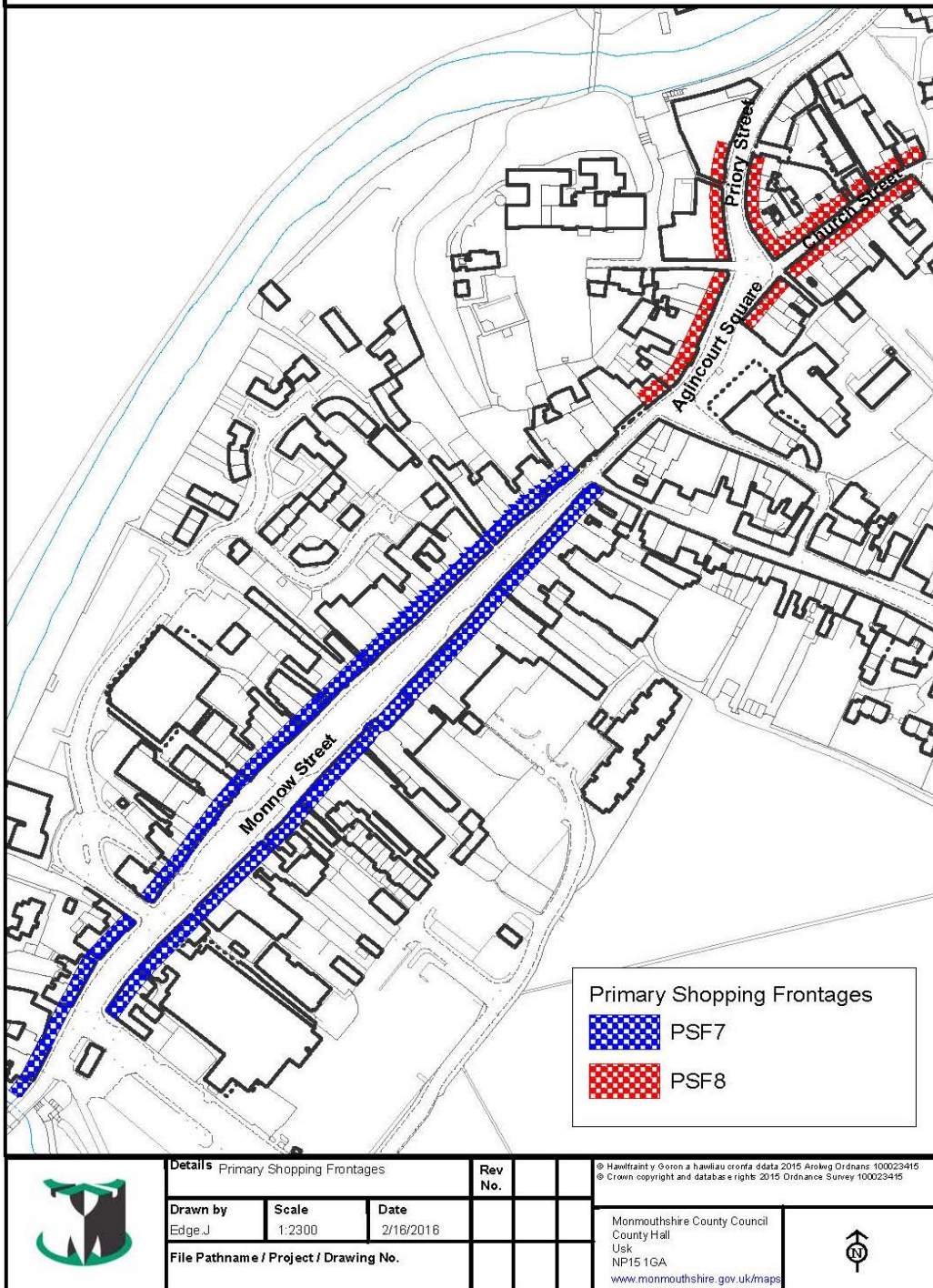
Chepstow



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

Monmouth

Primary Shopping Frontages - 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%

