RETAIL BACKGROUND PAPER

2025




Monmouthshire Local Development Plan

August 2026

Monmouthshire County Council
Local Development Plan

2025 Retail Background Paper

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1. INTRODUCTION

1.1.1 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 2025.

1.1.2 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.

1.1.3 In 2025 town centres across the UK have largely moved beyond the immediate impacts of the Covid-19 pandemic, with retail activity adapting to new consumer trends. The 2025 survey results indicate that Monmouthshire's town centres are finding new ways to stay resilient. The on-going impact of the pandemic will continue to be monitored through future reports. The survey was carried out prior to the flooding, in November 2025, which impacted the retail areas of Monmouth and Abergavenny. The effects of the flood will therefore not be included within this report.

1.1.4 Current Government planning policy or planning policy guidance as it relates to retailing and town centres is provided by Planning Policy Wales, Edition 12 February 2024, 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:

Use Class	Use
Comparison Outlets:	General retail outlets, laundrettes, video shops, showrooms, and D.I.Y.
Convenience Outlets:	Supermarkets, off-licences, grocers, bakers, butchers, and newsagents;
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 twenty 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 Cancer Research which operate nationwide often retail as modern and attractive stores, 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 Properties

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 twenty 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 in 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 usually carried out in November each year. A Footfall Survey was not undertaken in the periods between 2022 and 2025, therefore the most up-to-date data available can be seen in the 2021 Footfall Survey included in this paper. 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 20 years looking at the shopping patterns of people living in our main towns. The first survey was undertaken in 1997, this was then repeated in 2006 and then again in 2009 as part of a larger Retail and Leisure Study which was undertaken as a background study for the Local Development Plan, the latest survey was conducted in January 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

3.1.1 Within Monmouthshire a long-established retail hierarchy exists categorising town, local, and neighbourhood centres in accordance with the population each centre serves and the nature and scale of retail provision.

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

Figure 3.1 Monmouthshire's Retail Hierarchy

County Towns	• Abergavenny • Caldicot • Chepstow • Monmouth
Local Centres	• Magor • Raglan • Usk
Neighbourhood Centres & Shops	**Abergavenny** • Hillcrest Road • Rother Avenue • The Mardy **Caldicot** • West End **Chepstow** • Bulwark • Thornwell **Monmouth** • Overmonnow • Wyesham • The Albion

3.1.3 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.

3.1.4 This report will consider each of the four county 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 (2021 Census) which increases to 16,000 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 and a fourth day for a flea 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 a street food and craft night market once a month.

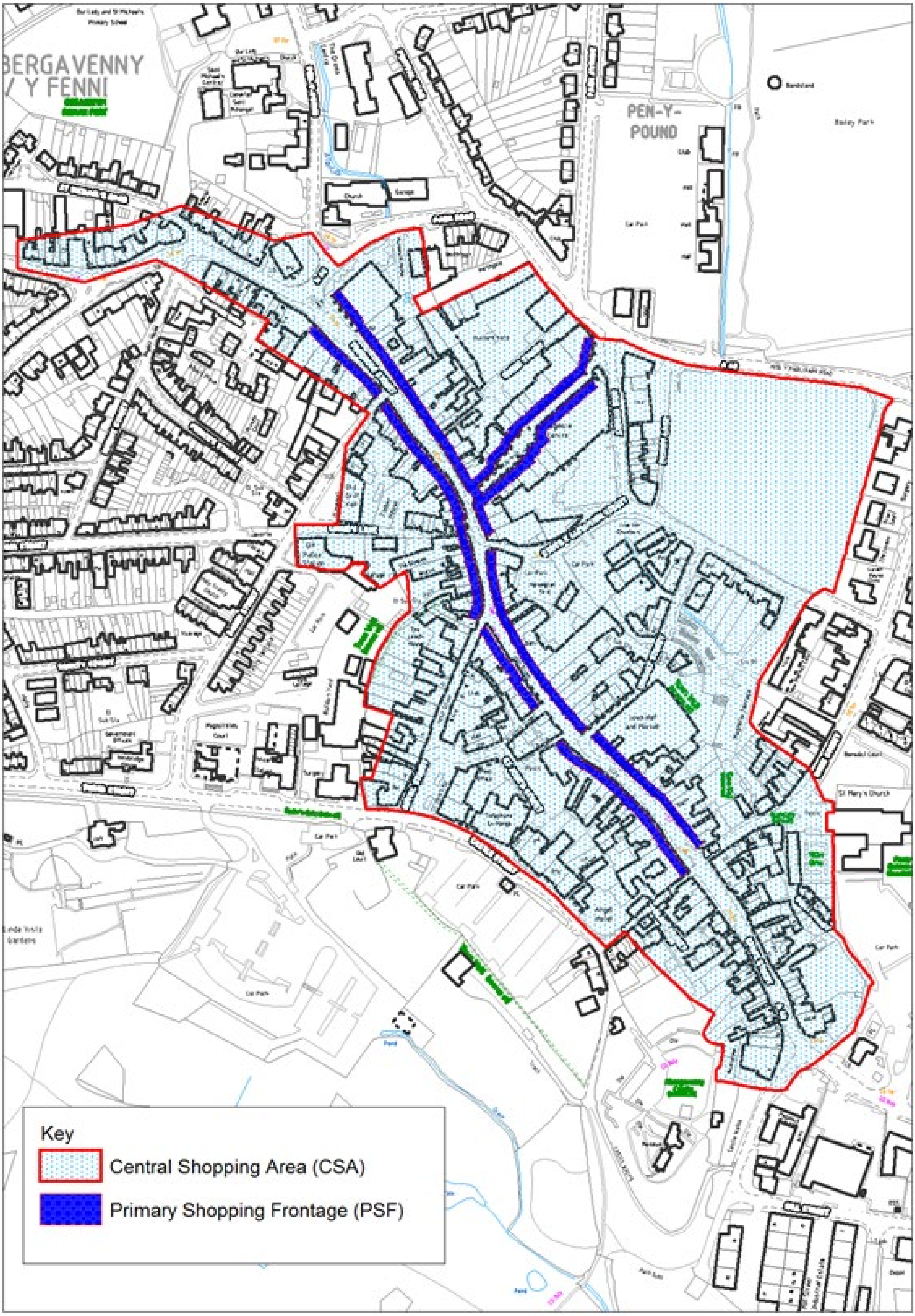
4.1.3 Policy RET2 of the Adopted LDP has defined for planning purposes the retail core of the town centre as a Central Shopping Area (CSA). The CSA relates to the central area, which provides a broad range of facilities and services and fulfils a function as a focus for both the community and public 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 D.

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). As the 2021 census data has not yet been broken down into such specific categories, 2011 census data has been used but this will be updated in future. 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 2025 retail survey demonstrated that comparison goods outlets accounted for 34.5% of Abergavenny town centre's retail and service uses. This proportion is comparatively low in relation to the period 2010 – 2019. The proportion of service uses within the CSA has increased significantly since the early 2000s and they now account for 49.1% of outlets in the Abergavenny CSA. 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 7.8%, a decrease on the 2024 survey.

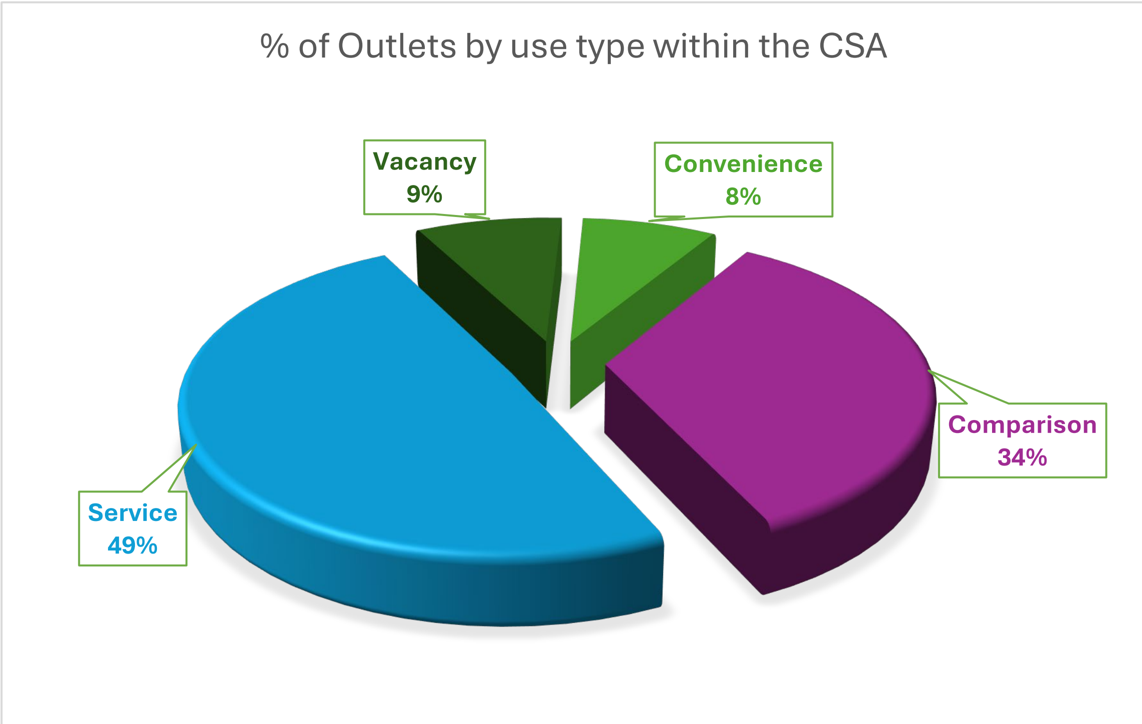
Figure 4.2 Number of Outlets within the CSA by Use Type over Time

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

Year	Comparison No.	Outlets %	Convenience No.	Outlets %	Service No.	Outlets %
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
2022	N/A	N/A	N/A	N/A	N/A	N/A
2023	107	37.5	21	7.4	140	49.1
2024	106	35.6	24	8.1	140	47
2025	101	34.5	23	7.8	144	49.1

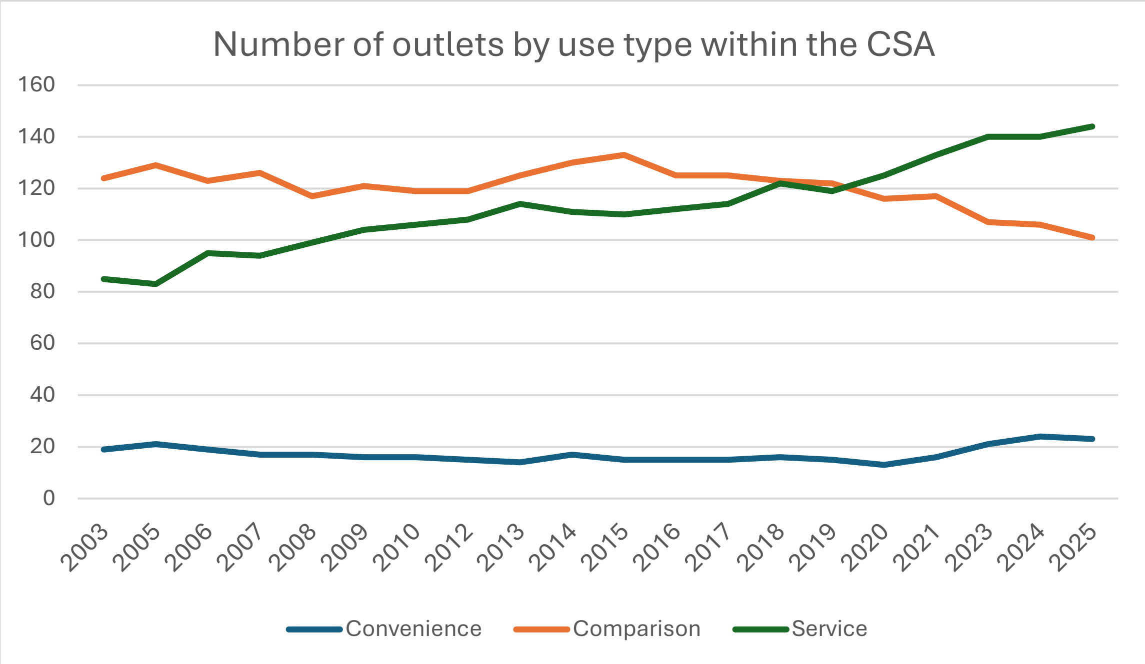
Note: Percentages include vacant units that are dealt with separately in section 4.6.

Figure 4.3 Percentage of Outlets within the CSA by Use Type



4.3.2 The results of the 2025 survey continue the trend in the increasing number of service outlets in the Abergavenny CSA since the early 2000s. In comparison, the number and proportion of comparison outlets have decreased, with their proportions lower than that of the service outlets, indicating a trend of decline in comparison outlets since the early 2000s, shown in **Figure 4.4**. Planning Policy Wales Edition 12 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'.

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



4.3.3 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.

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

4.4 Neighbourhood Centres

4.4.1 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. The composition of each is as follows:

Hillcrest Road	• Dobbins General Stores & Off Licence (VACANT) • Bevan Family Butchers • Abergavenny Community Enterprise Partnership
Rother Avenue	• Londis, General Stores • Frydays Fish Bar
The Mardy	• Mardy Traditional Fish & Chips (VACANT)

4.5 Retailer Representation

4.5.1 Abergavenny is a relatively large market town and contains a number of national multiple retailers. In the comparison sector, national multiple retailers including B&M Bargains in the variety and general household goods sector; Peacocks, Fat Face, Bon Marche, and Clarks in the clothing sector; and Superdrug, Savers and Boots in the cosmetics sector. Other national retailers include TG Jones and Waterstones (books/stationery), and Mountain Warehouse (outdoor equipment and clothing). In the convenience sector national retailers include a Morrison's, Tesco Express, 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 multiple independent bakeries. In addition, there are a considerable number of local comparison goods retailers.

4.5.2 A broad range of services can be found in Abergavenny, 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.

4.5.3 The number and proportion of national retailers in the Abergavenny CSA have fluctuated in recent years. The 2025 survey records a high of 53 national retailers, which represents 18% of retail units in the CSA. **Figure 4.5** illustrates that the number of national retailers has fluctuated since 2010, but until 2024 there had been a net decline in this period after a high in 2017. Since 2010 there has been a net decrease in the number of national retailers of 6 up until 2023, however, the number of chain cafes including Café Nero, Costa Coffee and Coffi Lab has grown since 2010 pointing to National Retailers reinvesting into town centres post Covid-19. There is also a growing range of independent cafes in the Abergavenny CSA as well. **Figure 4.5** shows the number of national retailers operating within the Abergavenny CSA over the past few years.

Figure 4.5 Number of National Retailers within the CSA over Time

Year	No. of Outlets	Year	No. of Outlets
2010	49	2019	48
2013	47	2020	44
2014	48	2021	43
2015	48	2022	N/A
2016	47	2023	43
2017	50	2024	52
2018	47	2025	53

Note: Figures do not include charity shops.

4.5.4 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 4% of outlets, a decrease of 2 from the 2024 survey.

4.6 Retailer Demand and Intentions to Change Representation

4.6.1 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 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, and Iceland. 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.

4.6.2 Other smaller developments have included Lewis's Walk, which consists of small retail units, providing approximately 400m^2 of net floorspace of niche local retailing.

4.6.3 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 Morrison's on the Cattle market site represents further evidence of continued retailer confidence in the town.

4.7 Vacancies

4.7.1 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.

4.7.2 **Figure 4.6** illustrates vacancy rates within the Abergavenny CSA over time.

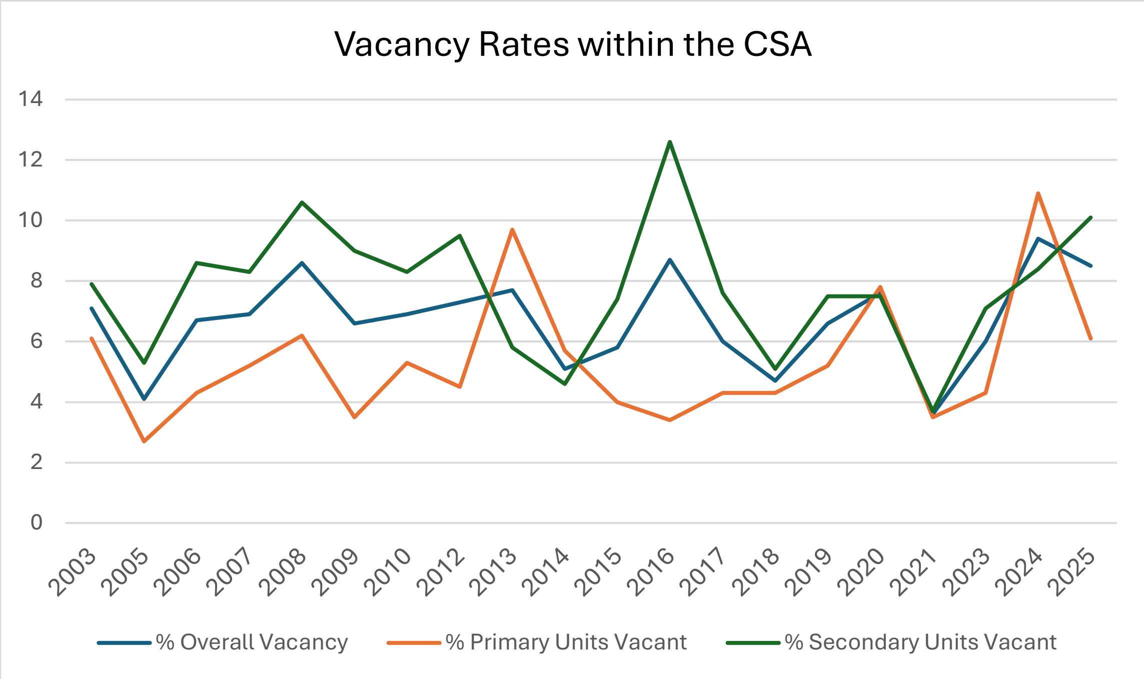
Figure 4.6 Number of Vacant Units over Time within the CSA

Year	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

Year	No. Vacant Units	Overall Vacancy %	Primary Units Vacant %	Secondary Units Vacant %
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
2022	N/A	N/A	N/A	N/A
2023	17	6	4.3	7.1
2024	28	9.4	10.9	8.4
2025	25	8.5	6.1	10.1

4.7.3 The 2025 retail survey records a decrease of 0.9% and 3 units in the overall vacancy rate of Abergavenny town centre, reducing from the highest on record in 2024. 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 had recovered from the initial impact of the pandemic considerably well and further demonstrates a desire to be located in Abergavenny CSA. The recent increase in vacancies in the 2023 and 2024 retail surveys may represent a return to pre pandemic trends. A recent fire on Frogmore Street that led to the demolition of multiple units will have had a significant and the most notable impact on vacancies in Abergavenny. Vacancies within the Primary Shopping Frontage has decreased a substantial 4.8%, although vacancies in the Secondary Shopping Frontage have increased by 0.7%.

Figure 4.7 Vacancy Rates over Time within the CSA



4.8 Pedestrian Flows

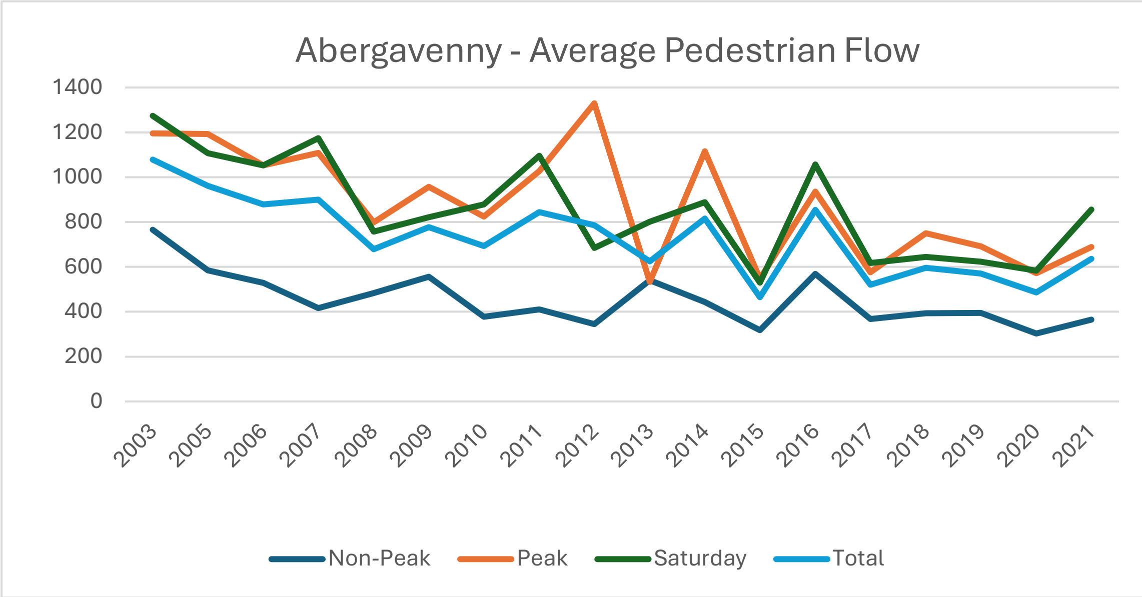
4.8.1 A Footfall Survey was not undertaken in the 2022, 2023, 2024 and 2025 periods, therefore the most up-to-date data available can be seen in the 2021 Footfall Survey outlined below.

4.8.2 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.

4.8.3 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.

4.8.4 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 4.8 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 4.8 Average Pedestrian Flow Rates over Time



4.9 Accessibility

4.9.1 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.

4.9.2 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. Morrison's also provides 233 spaces with 90-minute free parking in a central location with recently improved public realm and pedestrian links to the centre of town.

4.9.3 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.

4.9.4 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.

4.9.5 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.

4.10 Environmental Quality

4.10.1 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, a lot of this infrastructure has remained in 2024 with areas being pedestrianised, permanent outdoor seating and bike racks.

4.11 Household Survey

4.11.1 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 in 2015 and most recently in early 2022.

4.11.2 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.

4.11.3 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.

4.11.4 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 4.9 Main Convenience Shopping Outlet

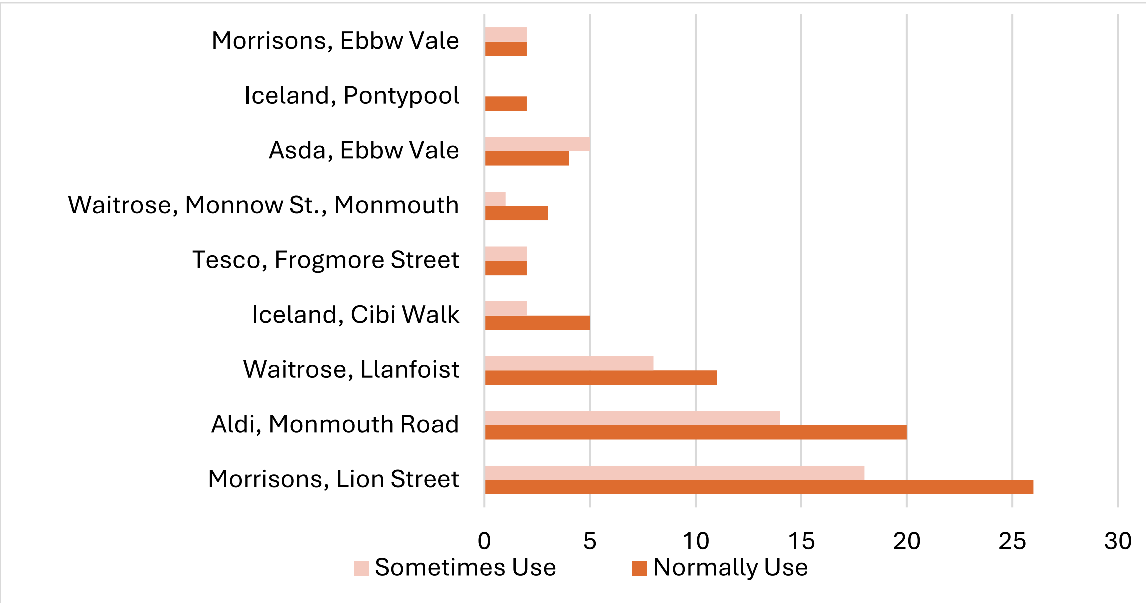
Outlet (%)	1997	2006	2009	2015	2022
Safeway (town centre)	34	-	-	-	-
Morrisons, Lion Street	-	-	-	-	26
Tesco, Frogmore Street	26	36	28	12	2
Waitrose (Llanfoist) (Safeway – 1997)	18	18	27	24	11
Kwiksave (town centre)	3	-	-	-	-
Iceland (town centre)	-	2	3	3	5
Aldi, Monmouth Road	-	-	-	30	20
Other Local Shops	1	1	-	-	-

Outlet (%)	1997	2006	2009	2015	2022
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

4.11.5 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.

4.11.6 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 4.10 Stores Visited for Main Food Shop



4.11.7 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 4.11 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

4.11.8 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 4.12 Comparison Shopping

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

4.11.9 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.

4.11.10 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.

4.11.11 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.

4.11.12 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.

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 9,800 (2021 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.

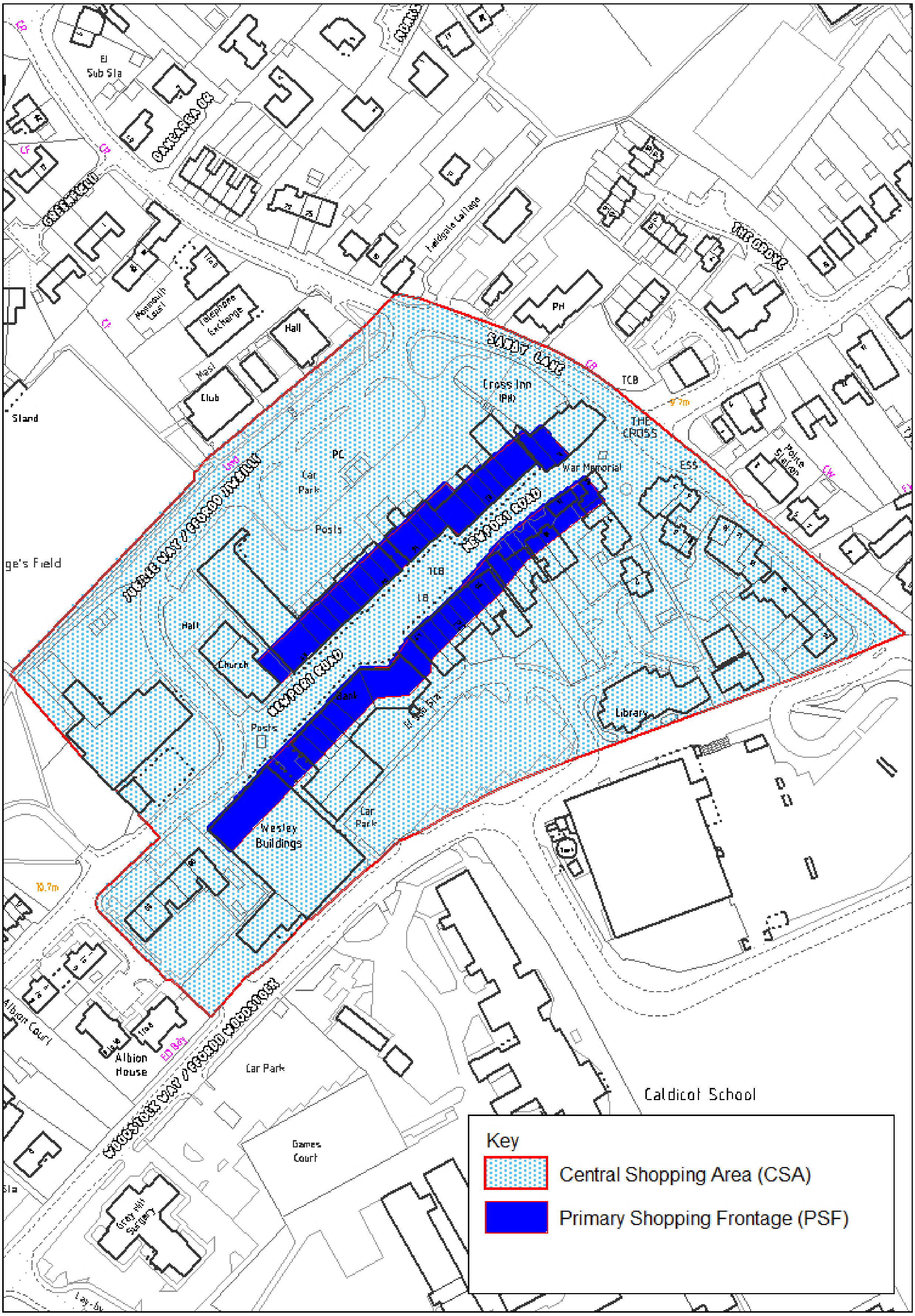
5.1.2 Policy RET2 of the Adopted Local Development Plan (LDP) has defined for planning purposes the retail core of the town centre as a Central Shopping Area (CSA). The CSA relates to the central area, which provides a broad range of facilities and services and fulfils a function as a focus for both 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.

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



5.2 Shopping Hinterland

5.2.1 The Caldicot shopping hinterland differs significantly from the large rural catchments that serve the principal market towns. The catchment serves an area extending from Rogiet in the west to Portskewett in the east and extends as far north as Llanvair Discoed (Appendix A). As the 2021 census data has not yet been broken down into such specific categories, 2011 census data has been used but this will be updated in future. 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, which now make up 60.6% of all outlets within the CSA. In contrast, comparison outlets, which account for 21.2% of all outlets, have generally declined since 2010. Following a fall to their lowest recorded level in 2020, the number and proportion of comparison outlets decreased again in 2024 with the 2025 survey showing little change from the previous year. The number and proportion of convenience outlets has remained relatively stable but has slightly decreased to a proportion of 7.6%. This reflects the influence of the ASDA superstore, which is located outside the CSA and is therefore not included within these survey figures.

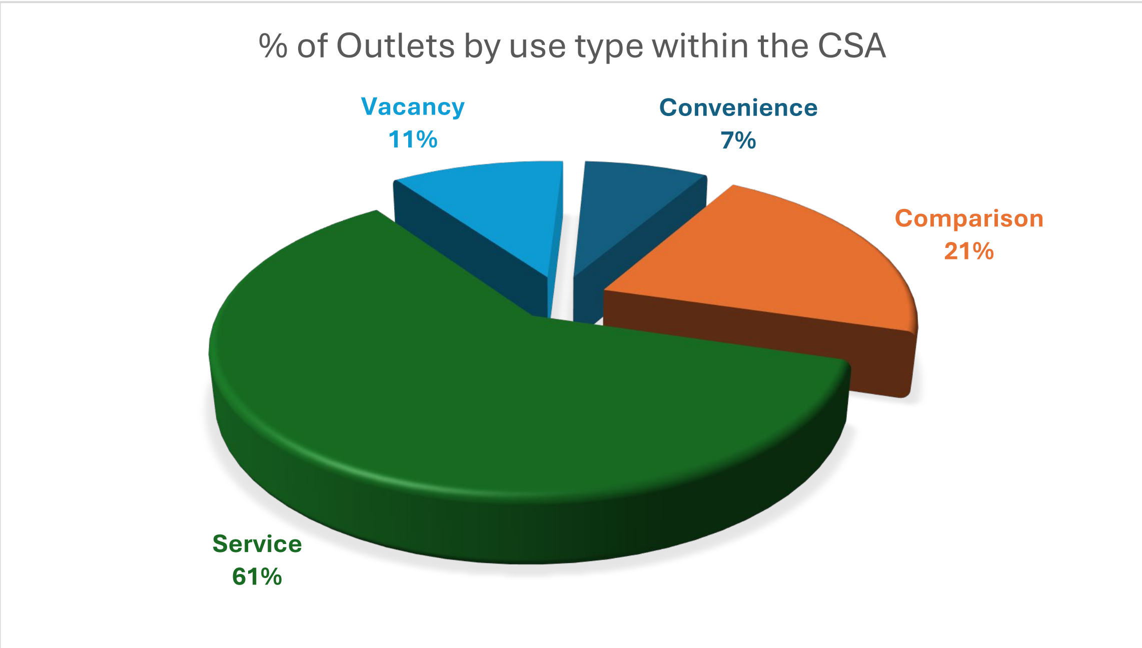
Figure 5.2 Number of Outlets within the CSA by Use Type over Time

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

Year	Comparison No.	Outlets %	Convenience No.	Outlets %	Service No.	Outlets %
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
2022	N/A	N/A	N/A	N/A	N/A	N/A
2023	18	24.3	7	9.5	42	56.8
2024	14	20.9	6	9	41	61.2
2025	14	21.2	5	7.6	50	60.6

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

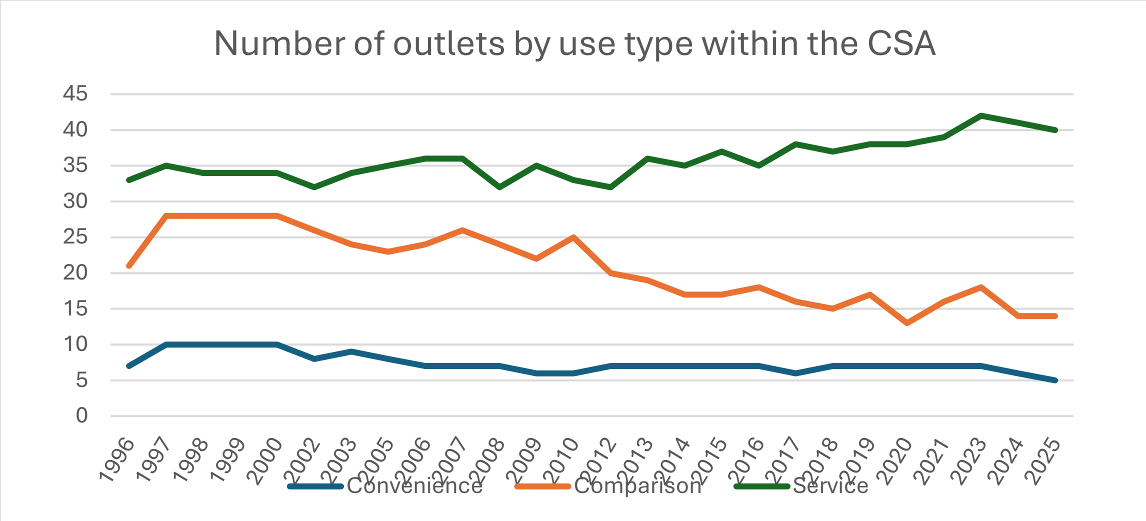
Figure 5.3 Percentage of Outlets by Use Type within the CSA



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 2025 survey indicates that this trend is continuing and records 40 service outlets within the Caldicot CSA. The survey also recorded a slight decrease in the number and proportion of convenience outlets whilst the number and proportion of comparison outlets remains relatively static. 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.

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



5.3.4 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.

5.3.5 Outside of the CSA there are other retailers and several neighbourhood shops and services, notably along Newport Road.

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

5.4 Neighbourhood Centres

5.4.1 Outside of the immediate vicinity 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 is as follows:

West End	• Caldicot Barbers • Caldicot Labour Club • Chickoland Pizza & Kebab • Co-op& Post Office • Red Lantern • The Dragonfly • Weeks Fish & Chips

5.5 Retailer Representation

5.5.1 Caldicot has a relatively small-town centre and supports a range of national multiple retailers, which account for 12% 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 and Greggs Bakery. In the comparison sector, Store Twenty-One and the Original Factory Shop have been replaced.

5.5.2 A significant number of service outlets are also present, including several hairdressers and barbers, betting shops, an estate agents and a couple of beauty salons also exist.

Figure 5.5 Number of National Retailers within the CSA over Time

Year	No. of Outlets	Year	No. of Outlets
2006	8	**2018**	9
2010	7	**2019**	9
2012	6	**2020**	9
2013	7	**2021**	9
2014	7	**2022**	N/A
2015	9	**2023**	7
2016	10	**2024**	13
2017	10	**2025**	8

5.5.3 The 2025 survey showed that 1 charity shop remains within the Caldicot CSA, which represents 1.5% of all CSA outlets.

5.6 Retailer Demand and Intentions to Change Representation

5.6.1 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. At the time of and as noted above, Aldi now occupy the premises at the Wesley Buildings previously occupied by Waitrose until 2021.

5.7 Vacancies

5.7.1 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.

5.7.2 **Figure 5.6** illustrates the current and past vacancy rates for the Caldicot CSA.

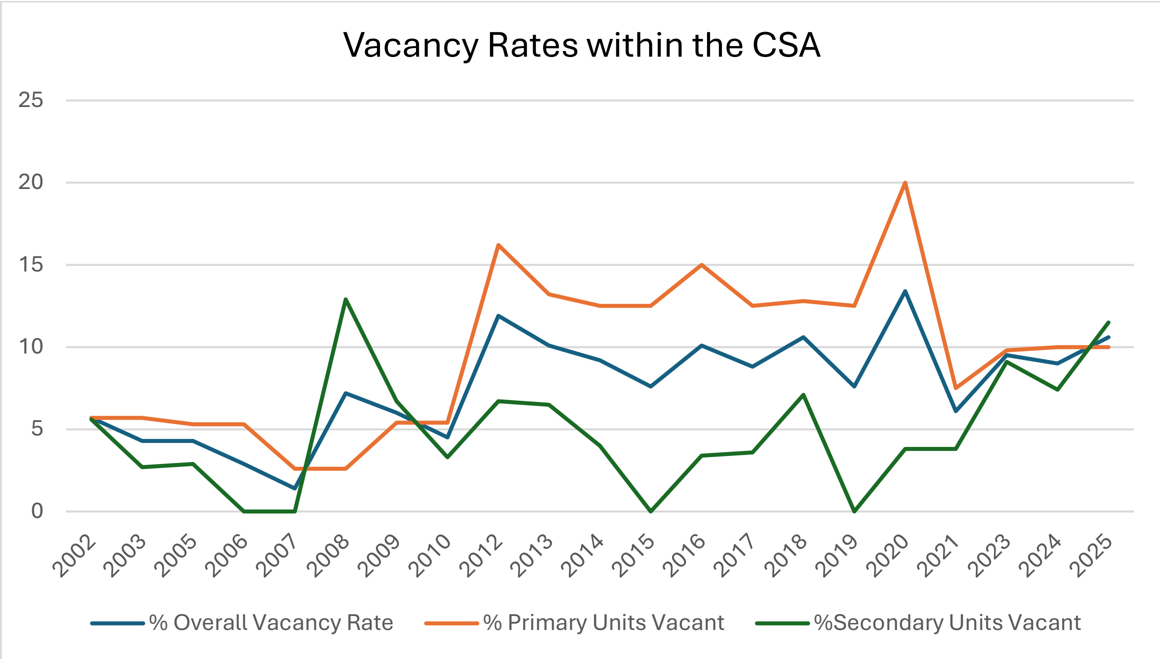
5.7.3 Caldicot town centre had a total of 7 vacant units at the time of the most recent survey, representing 10.6% of all outlets within the CSA. This is an increase of 1 unit and 1.5% respectively on levels recorded in 2024. Although 2021 was the lowest vacancy rate demonstrating that Caldicot had recovered from the initial impact of the pandemic reasonably well and that there was demand for retail space in the Caldicot CSA, the significant increase in 2023 and only slight decrease in 2024 surveys may signify the return to vacancy trends pre pandemic. The vacancy rate in primary frontages decreased considerably to 7.5% in the 2021 survey but increased to 10% in 2024 and remains static for 2025, still a long way off its recorded proportion in 2020. In secondary frontage vacancies represented 11.5% of all units in the secondary frontage, a large increase from the 2024 survey.

Figure 5.6 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
2022	N/A	N/A	N/A	N/A
2023	7	9.5	9.8	9.1

Year	No. Vacant Units	% Overall Vacancy Rate	% Primary Units Vacant	% Secondary Units Vacant
2024	6	9	10	7.4
2025	7	10.6	10	11.5

Figure 5.7 Vacancy Rates over Time within the CSA



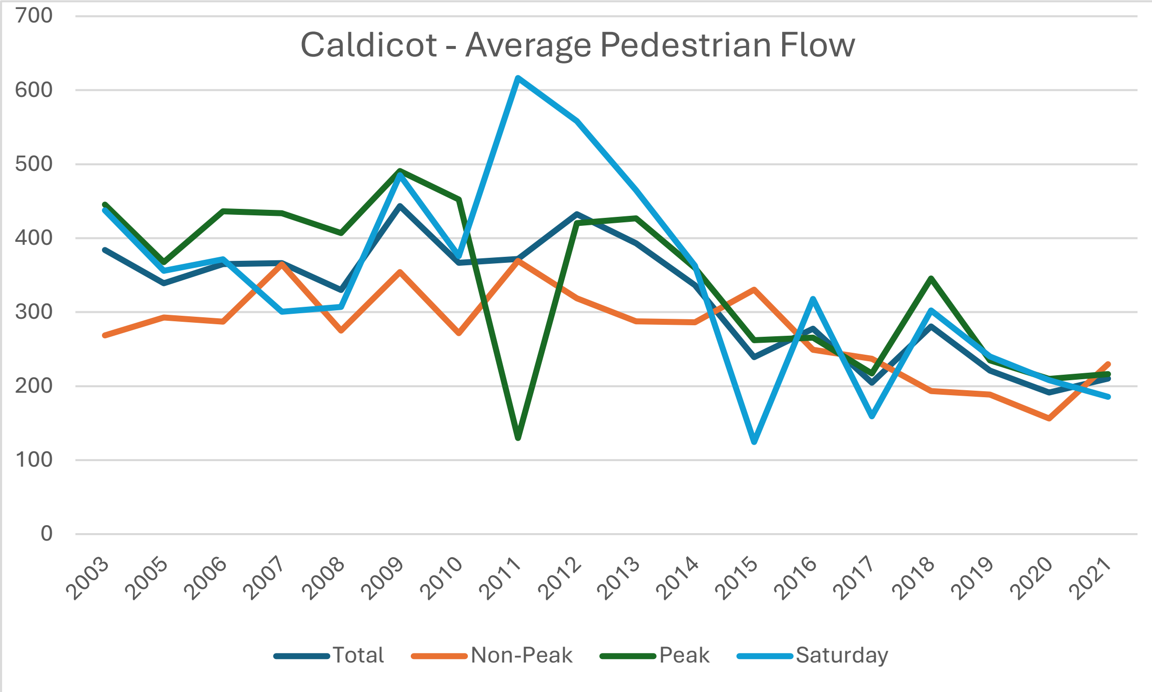
5.8 Pedestrian Flows

5.8.1 A Footfall Survey was not undertaken in the 2022, 2023, 2024 and 2025 periods, therefore the most up-to-date data available can be seen in the 2021 Footfall Survey outlined below.

5.8.2 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.

5.8.3 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 with 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 5.8** 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 5.8 Average Pedestrian Flow Rates over Time



5.8.4 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 a 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.

5.9 Accessibility

5.9.1 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.

5.9.2 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.

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

5.9.4 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 allow 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.

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

5.10 Environmental Quality

5.10.1 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 enhances the environmental quality of the town centre.

5.11 Household Survey

5.11.1 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.

5.11.2 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.

5.11.3 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.

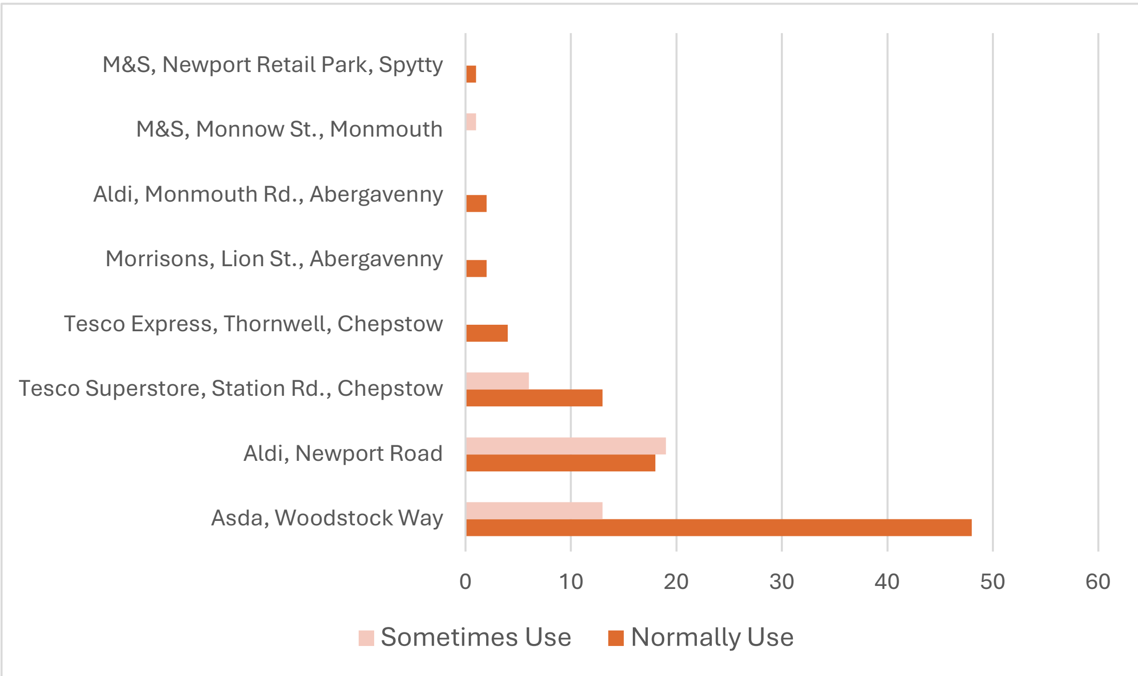
5.11.4 Of those interviewed in the Caldicot zone, 66% said that they do their main convenience shopping in Caldicot, a 9% increase on the previous survey. The opening of the Asda store on Woodstock Way has appeared to have increased trade retention in the town with 48% of respondents saying they normally do their main food shop there. The main trade draws 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 5.9 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

5.11.5 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 5.10 Stores Visited for Main Food Shop



5.11.6 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 5.11 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

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

Figure 5.12 Comparison Shopping

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

%	Caldicot	Other Mon'shire	Internet	Outside County/Other
				5% Bristol Cribbs Causeway
Electrical goods	1	6	52	41 *13% Newport Retail Park* *8% Bristol Cribbs Causeway*
DIY, hardware and gardening goods	44	34	10	12 *1% Cardiff City Centre/Friars Walk, Newport*
Banking, financial and legal services	22	11	43	24 *7% Newport Town Centre* *6% Friars Walk, Newport*

5.11.8 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.

5.11.9 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.

5.11.10 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.

5.11.11 In terms of the respondent's 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.

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 Southwest 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 11,900 (2021 Census). The population rises to approximately 16,200 when the neighbouring Tutshill and Sedbury areas are included (2011 Census). As the 2021 census data has not yet been broken down into such specific categories, 2011 census data has been used but this will be updated in future.

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.

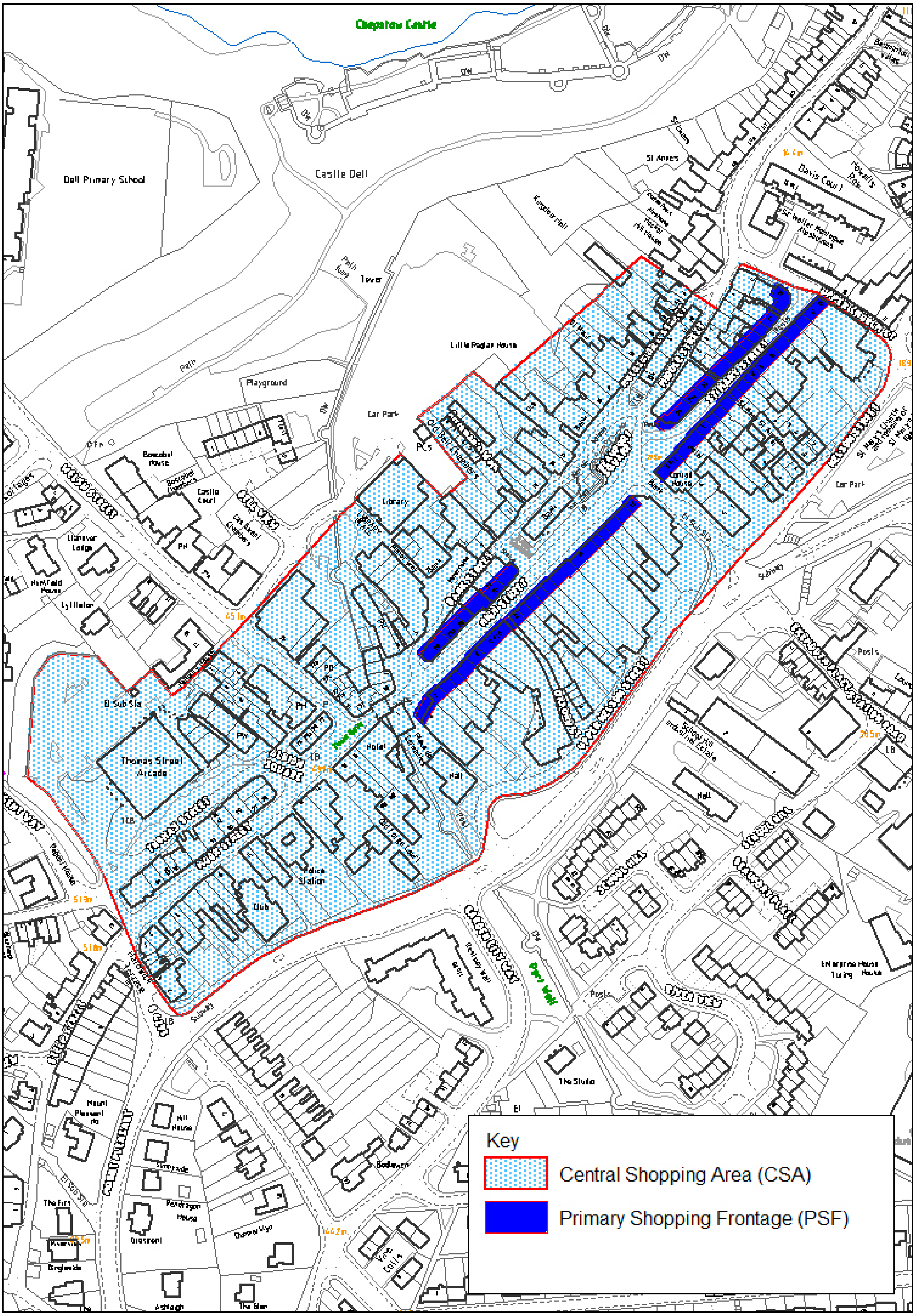
6.1.3 Policy RET2 of the Adopted Local Development Plan (LDP) has defined for planning purposes the retail core of the town centre as a Central Shopping Area (CSA). The CSA relates to the central area, which provides a broad range of facilities and services and fulfils a function as a focus for both 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 northeast. 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 2025 survey indicates that the majority of outlets within the Chepstow CSA are service outlets which account for 61.8% 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, after a marginal increase in 2021, the 2023 survey record another sharp decline in their number and proportion and an even sharper decline in 2024, whereby they represent 25.4% of outlets in the Chepstow CSA. The 2025 survey shows little change. Service outlets have consistently recorded a larger proportion than convenience outlets, which represented 61.8% at the time of the most recent survey. The majority proportion of service outlets with the Chepstow CSA reflects the wide range of professional and financial services as well as restaurants, pubs and cafes associated with the centre.

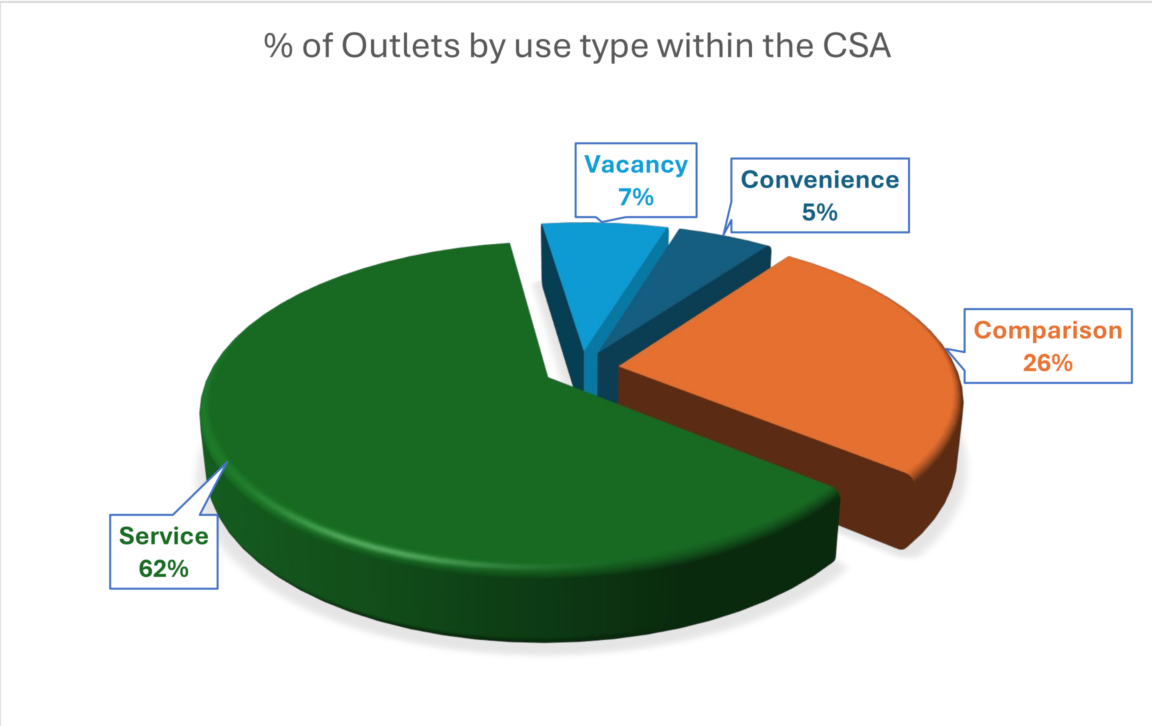
Figure 6.2 Number of Outlets within the CSA by Use Type over Time

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
2022	N/A	N/A	N/A	N/A	N/A	N/A
2023	54	30.7	9	5.1	86	50.6
2024	44	25.4	10	5.8	106	61.3
2025	44	25.9	9	5.3	105	61.8

Note: Figures include vacant units which are dealt with separately in section 6.6.

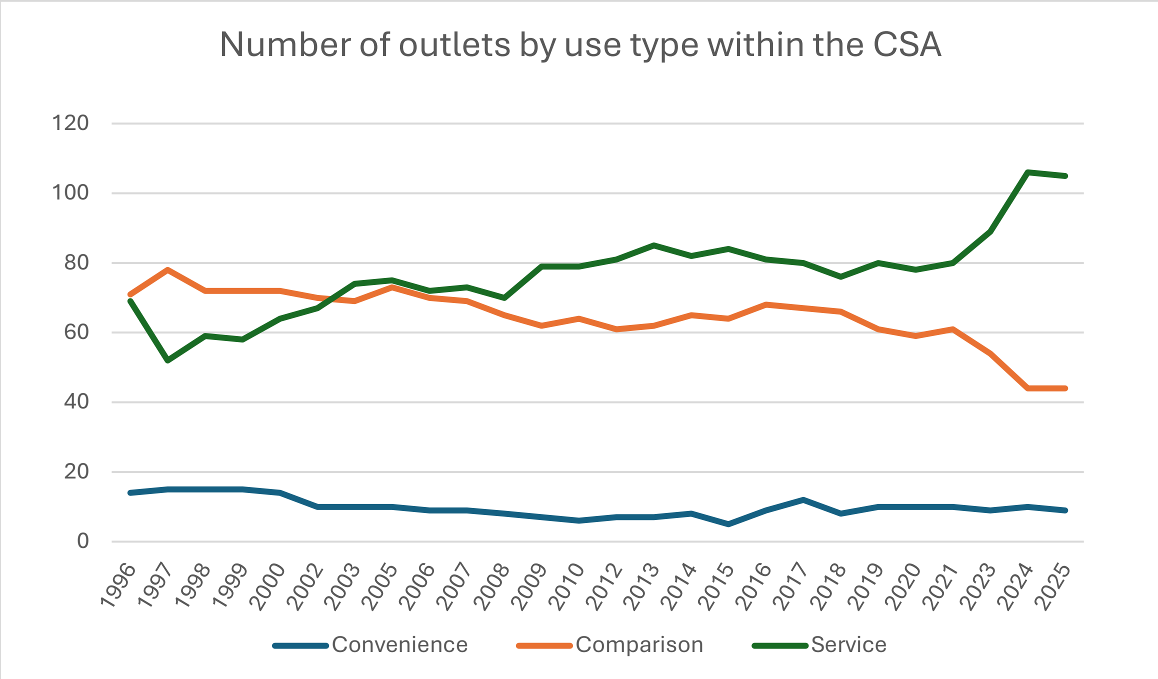
Figure 6.3 Percentage of Outlets by Use Type within the CSA



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. The 2025 survey continues the trend with an all-time low in number and a very slight increase in proportion of comparison units at 44 and 25.9% respectively in the CSA. Of the three market towns in the County, Chepstow has the lowest percentage representation of comparison units in the CSA, previously being held by Monmouth. 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 2025 survey records a further increase in their proportion on the 2023 survey, where they now represent 61.8% 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 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.

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

6.4 Neighbourhood Centres

6.4.1 Neighbourhood Centres also exist, providing a retail offer of a local nature. Chepstow has two such centres located at Thornwell and Bulwark. These centres do not feature as part of this survey, however, the composition of each is as follows:

Bulwark	• Bargain Booze • Bulwark Pharmacy • Cofira • Costcutter • Cutz • Dominos Pizza • Eastern Flavas • Efes BBQ Kebab House • Kibby's Fish and Chip Shop • Mencap • O Yes Kebab House • Premier & Post Office • St David's Foundation • Summerview Vets • The Hair Lounge • The Vape Escape • Wonderfood Chinese Takeaway • Zags Barber
Thornwell	• Golden Fish Bar • Tesco Express • B&M Bargains • Wye Valley Country Store

6.5 Retailer Representation

6.5.1 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 14.5% at the time of the most recent survey, which is lower than Abergavenny (17%), Monmouth (22%), and Caldicot (19%).

6.5.2 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 Card Factory, Peacocks, TG Jones, Boots, Superdrug, and Specsavers.

Figure 6.5 Number of National Retailers within the CSA over Time

Year	No. of Outlets	Year	No. of Outlets
2006	21	**2019**	20
2010	21	**2020**	21

Year	No. of Outlets	Year	No. of Outlets
2013	23	**2021**	20
2014	22	**2022**	N/A
2015	21	**2023**	19
2016	22	**2024**	25
2017	22	**2025**	20
2018	21		

Note: Figures do not include charity shops.

6.5.3 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, European mini market and newsagent.

6.5.4 There are a number of service outlets in Chepstow, financial services and estate agents are represented. A high proportion of café / tearooms and similar service retailers can be found in the town.

6.5.5 In Chepstow the number of charity shops has remained relatively static for a number of years, the 2025 survey shows that there are 5 charity outlets all of a national nature. Charity shops represent 3% of the outlets within the CSA in 2025. This figure is higher than the 2023 survey but is lower than in the other County towns except for Caldicot with 1.4%.

6.6 Retailer Demand and Intentions to Change Representation

6.6.1 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 but has been now replaced by Pontio Lounge. 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 Cooperative store where there had 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.

6.6.2 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. Wilko subsequently closed leaving the unit vacant, however, at the time of 2025 survey the unit is occupied by Poundland.

6.6.3 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 2025 survey, was mostly 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.

6.6.4 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. The vacancy rate on High Street has improved substantially to 7.4%, at the time of the 2025 survey, with just 2 units vacant (The Original Factory Shop and O2).

6.7 Vacancies

6.7.1 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.

6.7.2 **Figure 6.6** illustrates the current and past vacancy rates for the Chepstow CSA.

6.7.3 The 2024 survey recorded a substantial decrease in the number of vacant units and overall vacancy rate by 11 and 6.1% respectively. The 2025 survey recorded a further slight decrease of 1 and 0.4% respectively. Overall vacancy (7.1%) is now very similar as in 2016. This decrease may indicate that Chepstow's vitality is on the rise. Of the market towns in the County, Chepstow (7.1%) has the lowest overall vacancy rate and a considerably lower rate than Monmouth (11.4%).

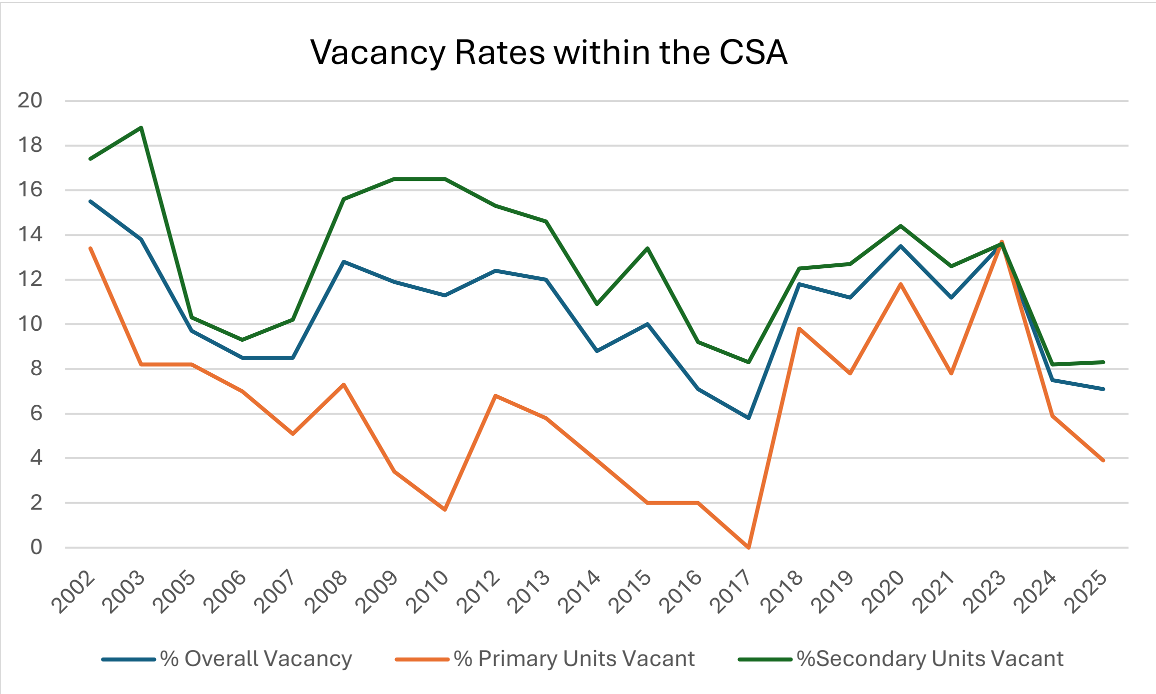
Figure 6.6 Number of Vacant Units over Time within the CSA

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

Year	Number of Vacant Units	% Overall Vacancy	% Primary Units Vacant	%Secondary Units Vacant
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
2022	N/A	N/A	N/A	N/A
2023	24	13.6	13.7	13.6
2024	13	7.5	5.9	8.2
2025	12	7.1	3.9	8.3

6.7.4 At the time of the most recent survey, there were a couple of vacant units within primary frontages representing 3.9% of outlets within this designation, a 2% decrease upon the previous survey. Previously, like Monmouth, Chepstow has had a relatively high level of vacancy on secondary shopping frontages, which in Chepstow, has been consistently higher than that seen for primary frontages; as of the most recent survey the level has increased by 0.1% to 8.3%.

Figure 6.7 Vacancy Rates over Time within the CSA



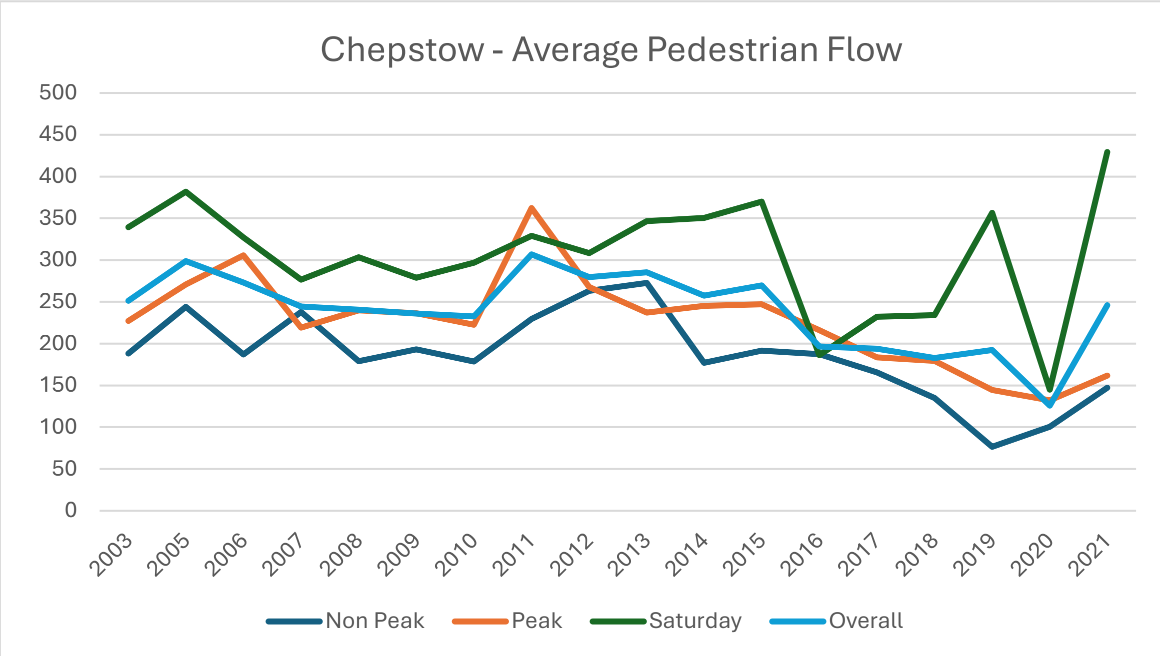
6.8 Pedestrian Flows

6.8.1 A Footfall Survey was not undertaken in the 2022, 2023, 2024 and 2025 periods, therefore the most up-to-date data available can be seen in the 2021 Footfall Survey outlined below.

6.8.2 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.

6.8.3 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 6.8 Average Pedestrian Flow Rates Over Time



6.8.4 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.

6.9 Accessibility

6.9.1 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.

6.9.2 The availability and cost of town centre parking can determine what mode of transport to use and can also influence the business performance of the CSA. Chepstow has several car parks, the Marks & Spencer Foodhall Car Park has 121 spaces, and two other car parks adjacent to the town centre provide a further 294 spaces, 23 of which are disabled bays. All of the carparks are subject to charging and at the time of the 2024 survey appeared to be popular and well used.

6.9.3 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.

6.9.4 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.

6.9.5 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.

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

6.10 Environmental Quality

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

6.11 Household Survey

6.11.1 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.

6.11.2 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.

6.11.3 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 6.9 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

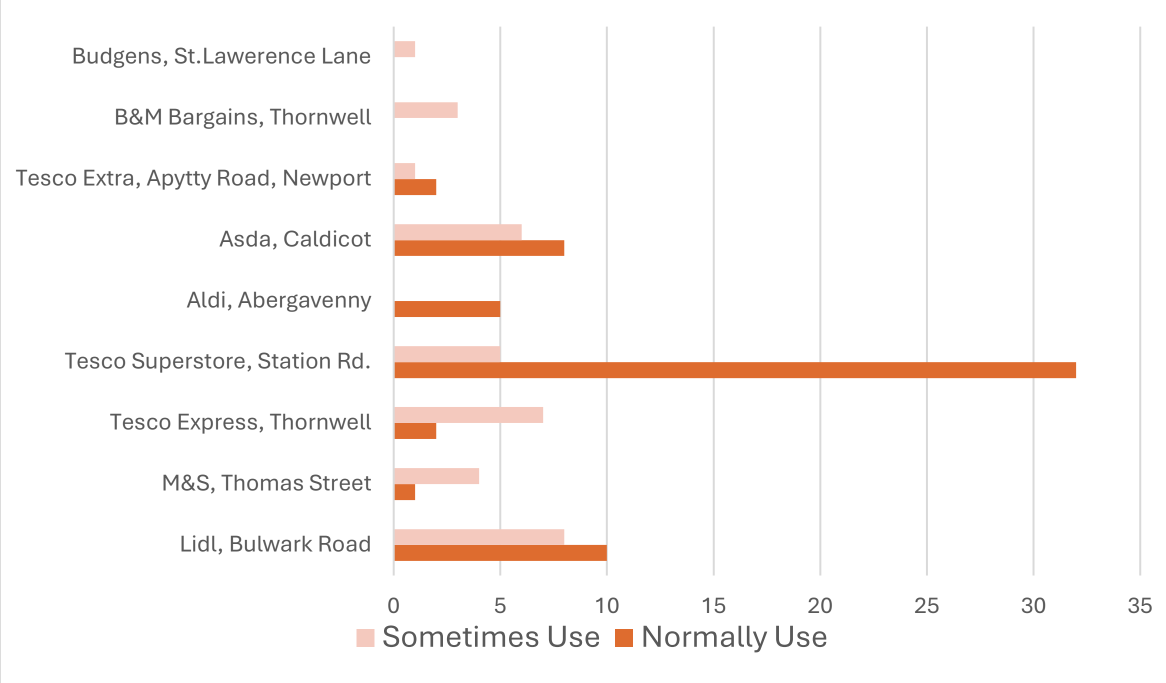
6.11.4 Of the people interviewed for the 2022 survey, just under two thirds do their main food shopping once a week or more often, this falls slightly to 62% of respondents in the Chepstow catchment area.

6.11.5 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.

6.11.6 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.

6.11.7 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 6.10 Stores Visited for Main Food Shop



6.11.8 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 6.10 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

6.11.9 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 6.11 Comparison Shopping

%	Chepstow	Other Mon'shire	Internet	Outside County/Other
1st choice clothes, footwear and other fashion goods	9	9	25	57 *23% Bristol Cribbs Causeway* *8% Newport Retail Park*
2nd choice clothes, footwear and other fashion goods	4	7	14	75 *12% Bristol City Centre* *10% Bristol Cribbs Causeway*
Books, music, DVDs and toys	21	9	38	32 *15% Bristol Cribbs Causeway* *4% Friars Walk, Newport*
Chemist goods, toiletries and cosmetics	41	28	4	27 *10% Bristol Cribbs Causeway* *3% Friars Walk Newport*
Furniture, carpets and soft furnishings	7	4	37	52 *14% Bristol Cribbs Causeway* *5% Cardiff City Centre*
Household goods, glass, china and tableware	23	9	22	46 *20% Bristol Cribbs Causeway* *6% Newport Retail Park*
Electrical goods	4	4	41	51 *15% Bristol Cribbs Causeway* *12% Newport Retail Park*
DIY, hardware and gardening goods	57	17	7	19 *7% Newport Retail Park* *2% Bristol Cribbs Causeway*
Banking, financial and legal services	28	15	31	26 *6% Bristol Cribbs Causeway* *4% Cwmbran*

6.11.10 **Figure 6.11** 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 Spytty Retail Park in Newport. In the DIY sector, however, Chepstow retains the joint highest percentage (with Abergavenny) of any of the towns.

6.11.11 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.

6.11.12 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%).

6.11.13 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.

6.11.14 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.

7. MONMOUTH

7.1 Background

7.1.1 The historic town of Monmouth is situated at the northeastern 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 2021 Census was 10,300, 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.

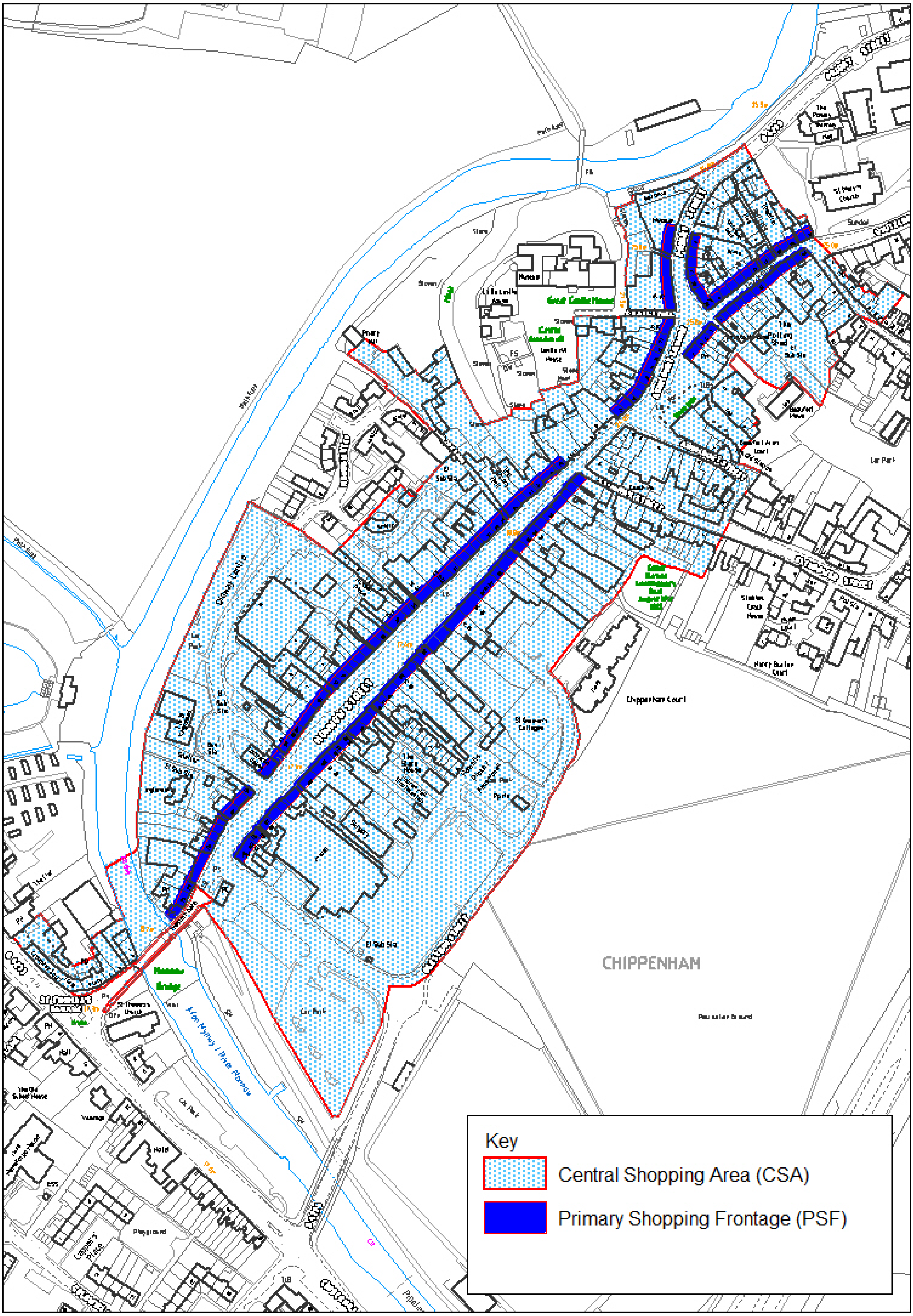
7.1.2 Policy RET2 of the Adopted LDP has defined for planning purposes the retail core of the town centre as a Central Shopping Area (CSA). The CSA relates to the central area, which provides a broad range of facilities and services and fulfils a function as a focus for both the community and public 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). As the 2021 census data has not yet been broken down into such specific categories, 2011 census data has been used but this will be updated in future. 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

7.3.1 The results of the 2025 survey record an increase in the number of comparison, convenience and also service outlets. The proportion of service outlets in the Monmouth CSA in 2025 remains the lowest of all centres surveyed at 39.9%. However, of the three market towns, Monmouth has the highest proportion of convenience outlets at 9.8% despite the marginal decline recorded in 2021. Although, in earlier surveys, and unlike the other market towns, the largest proportion of outlets in the Monmouth CSA was accounted for by comparison outlets, since the 2023 survey this has changed and now the Monmouth CSA follows the same trend as both Abergavenny and Chepstow with their largest proportion being service outlets. The number and proportion of service outlets in the Monmouth CSA is at its highest since 2016 with 39.9%.

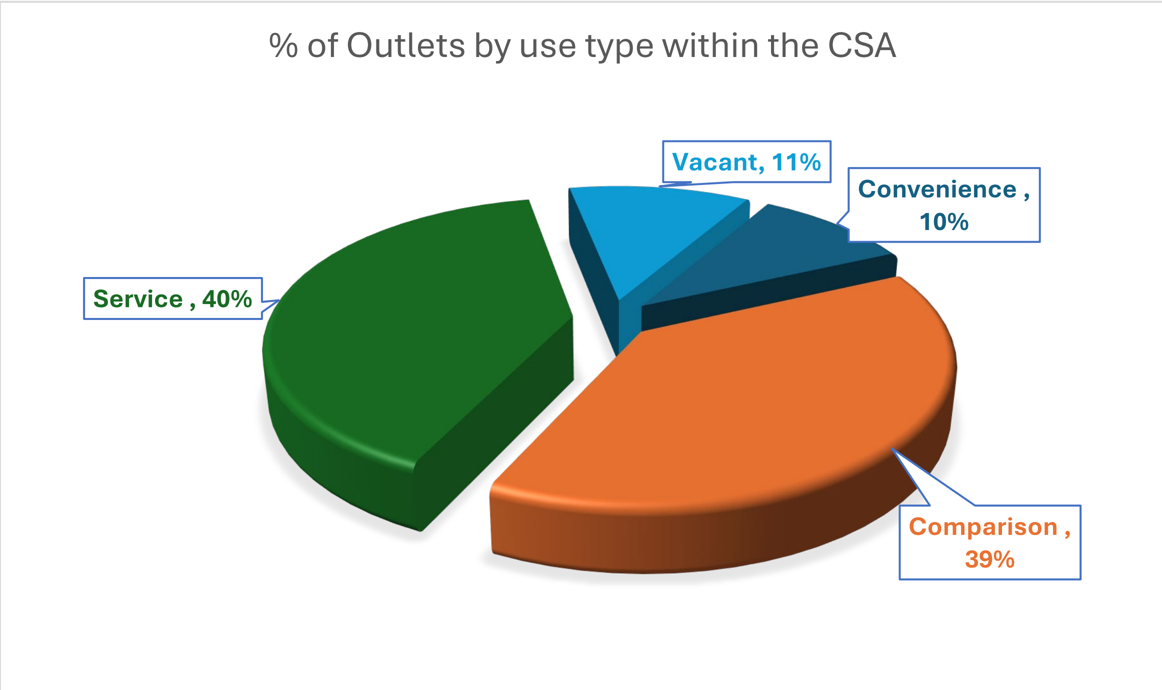
Figure 7.2 Number of Outlets within the CSA by Use Type over Time

Year	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

Year	Convenience No.	Outlets %	Comparison No.	Outlets %	Service No.	Outlets %
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
2022	N/A	N/A	N/A	N/A	N/A	N/A
2023	16	8.5	64	34	73	38.8
2024	16	8.6	70	37.4	72	38.5
2025	19	9.8	75	38.9	77	39.9

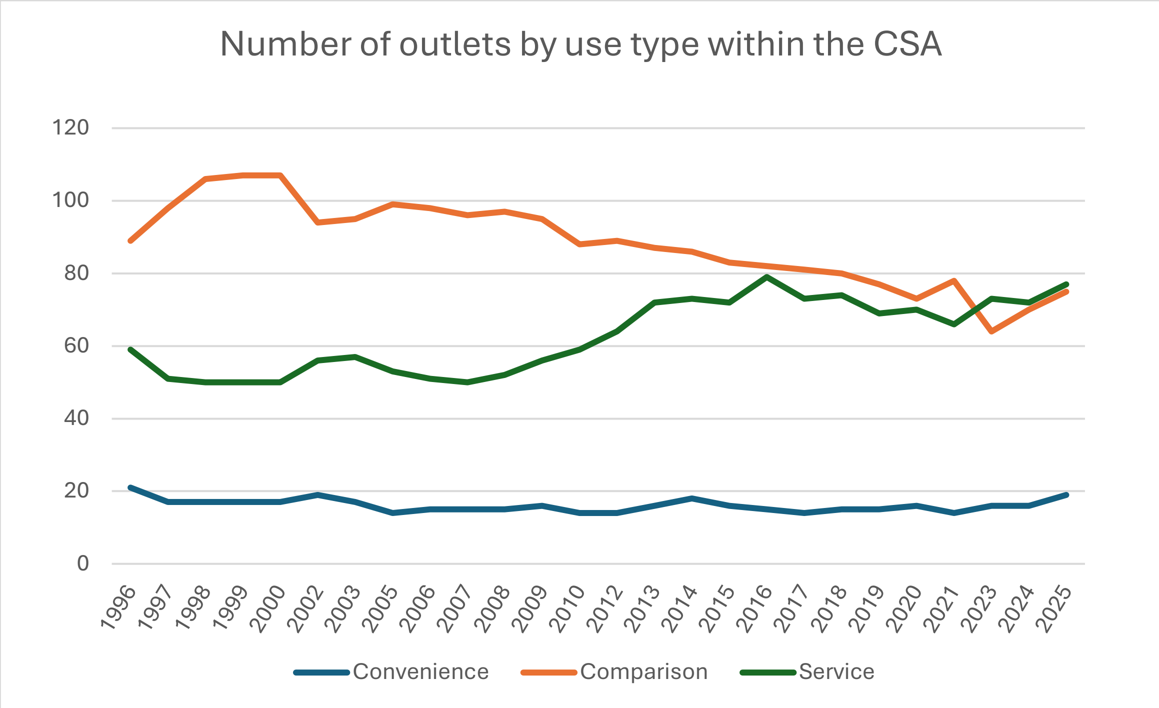
Note: Percentages include vacant units which are dealt with separately in section 7.6

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. The 2025 survey records an increase to similar levels, in both comparison and service outlets, to 38.9% and 39.9% respectively.

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



7.3.3 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 vacated and are no longer represented within the town.

7.4 Neighbourhood Centres

7.4.1 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. The composition of each at the time of the 2025 survey was as follows:

Overmonnow	• Londis and Post Office
Wyesham	• Morrison Daily and Post Office
The Albion	• The Albion Off License • Yummies

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

7.4.3 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, Dominos Pizza and a veterinary practice.

7.5 Retailer Representation

7.5.1 Despite the moderate size of the market town, Monmouth has a relatively high proportion of national multiple retailers, accounting for over 22% 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 multiple bakeries. The comparison sector also features several national retailers including Home Bargains, White Stuff, and Joules 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 TJ Jones (books/stationery), and Specsavers as well as a Vision Express.

Figure 7.5 Number of National Retailers within the CSA over Time

Year	No. of Outlets	Year	No. of Outlets
2006	37	**2018**	32
2010	36	**2019**	33
2012	37	**2020**	32
2013	36	**2021**	32
2014	35	**2022**	N/A
2015	34	**2023**	39
2016	33	**2024**	42
2017	33	**2025**	44

Note: Figures do not include charity shops.

7.5.2 There is also a broad range of services within the CSA, including national banks and building societies, travel agents and estate agents. The town is well served by cafes, restaurants, pubs, and bars, both national chains and independent. Similar to other town centres in Monmouthshire, a significant trend in recent years has been the growth in representation of chain restaurants and cafes. In Monmouth, the opening of outlets such as Costa, Coffee @1, Café Nero, and Pizza Express reflects a trend seen in both Abergavenny and Chepstow. **Figure 7.5** indicates that the representation of national retailers has been steadily increasing since 2021.

7.5.3 In 2025 there were 9 charity shops trading in the CSA, representing 5% 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. Many of the charity shops are of a national nature.

7.6 Retailer Demand and Intention to Change Representation

7.6.1 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.

7.6.2 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 2025 survey highlights some long-standing vacancies which are discussed further below. Whilst there are some long-standing vacancies, the most recent survey notes the opening of Bar 125 in the former Gate House premises on Monnow Street, adjacent to the river, also vacant premises on Monnow Street previously occupied by 'BonBon' has become occupied by an independent haberdashery and a shop previously occupied by 'Kear & Ku Menswear' is now occupied by 'Quatro Tiles'. However, the closure of Lloyds Bank and Halifax Building Society leave a further two premises vacant along with the likes of Natwest, Subway and Oasis Hair Salon which have all vacated premises on 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', 'Barclays' 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.

7.6.3 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. 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.

7.6.4 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.

7.7 Vacancies

7.7.1 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.

7.7.2 **Figure 7.6** illustrates the current and past vacancy rates for Monmouth's CSA.

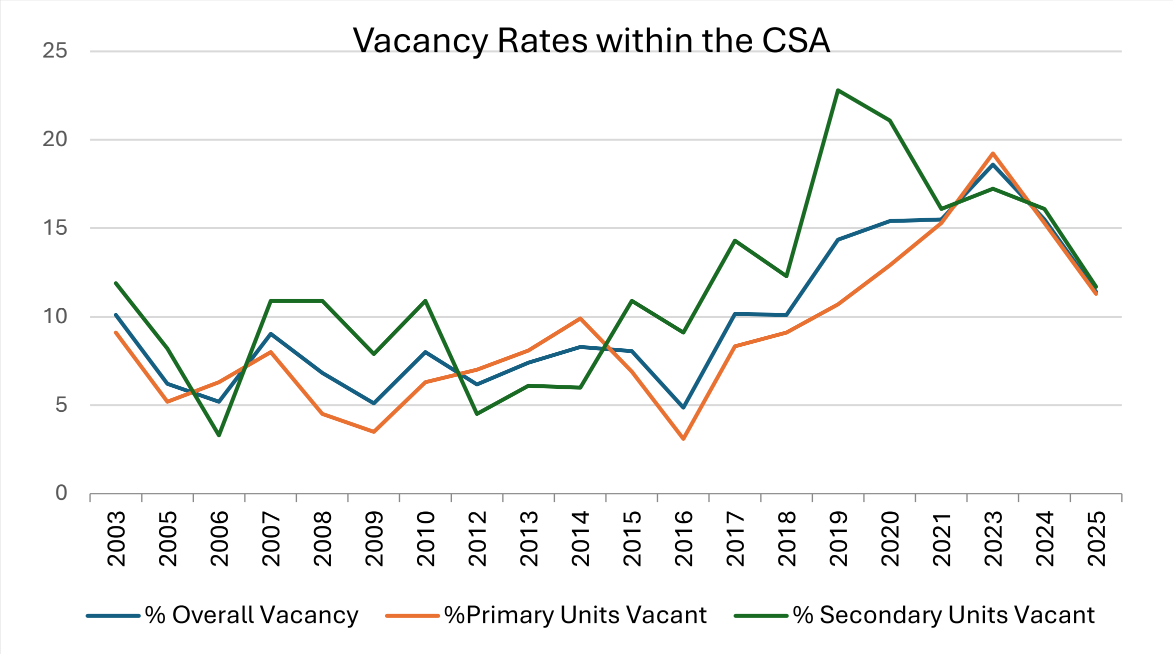
7.7.3 **Figure 7.6** illustrates that the number of vacant units within Monmouth's CSA has increased since 2018 and the 2025 survey recorded 22 vacant units representing 11.4% of all units within the CSA a decrease on the previous survey. The overall vacancy in 2025 is the lowest since 2018 and may in part reflect but suggest a recover from post pandemic trends.

Figure 7.6 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
2022	N/A	N/A	N/A	N/A
2023	35	18.6	19.2	17.2
2024	29	15.5	15.3	16.1
2025	22	11.4	11.3	11.7

7.7.4 Since 2017, Monmouth CSA has sustained a relatively high number of vacant units, particularly in 2023 but this is showing definite signs of improvement with the 2025 survey. Of the three market towns Monmouth has the highest overall vacancy rate by a relatively substantial margin: Chepstow (7.1%) and Abergavenny (6%). In 2025 there was a notable decrease of 3% in the proportion of vacant units located on primary frontages which stood at 15.3% in 2024, itself being a drop of 3.9% from 2023 the highest on record. Similarly, the proportion in secondary frontages fell significantly by 4.4% as of the latest survey

Figure 7.7 Vacancy Rates over Time within the CSA



7.8 Pedestrian Flows

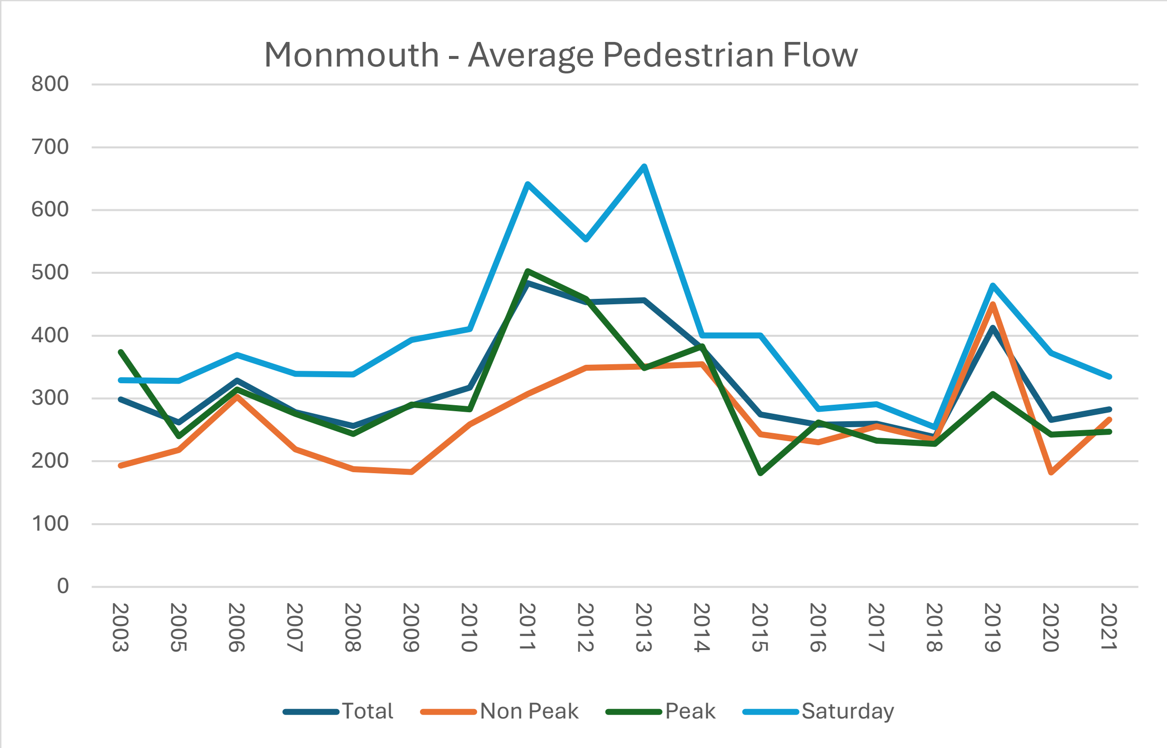
7.8.1 A Footfall Survey was not undertaken in the 2022, 2023, 2024 and 2025 periods, therefore the most up-to-date data available can be seen in the 2021 Footfall Survey outlined below.

7.8.2 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.

7.8.3 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.

7.8.4 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 7.8**.

Figure 7.8 Average Pedestrian Flow Rates over Time



7.9 Accessibility

7.9.1 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 2024 survey. There is additional parking at the Waitrose store, however this is time limited at 1 hour.

7.9.2 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.

7.9.3 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.

7.10 Environmental Quality

7.10.1 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 2024 retail survey.

7.11 Household Survey

7.11.1 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.

7.11.2 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.

7.11.3 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.

7.11.4 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.

7.11.5 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 a considerable reduction in their proportion since 2015.

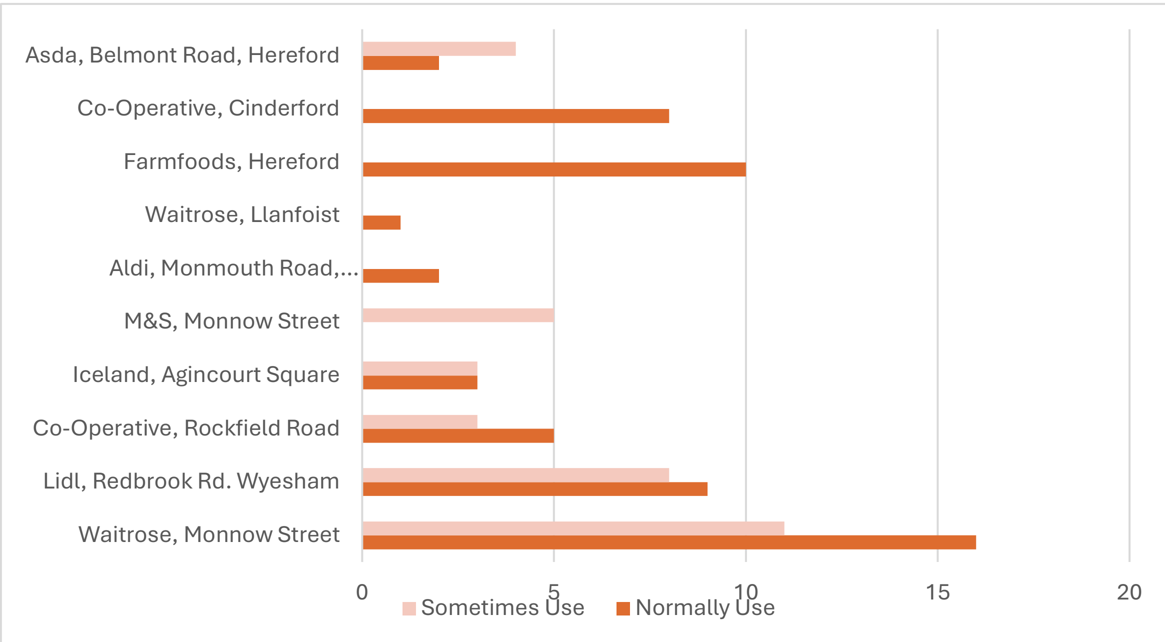
Figure 7.9 Main Convenience Shopping Outlet

Outlet (%)	1997	2006	2009	2015	2022
Waitrose	35	41	31	26	16
Home Bargains (Co-operative – 2018) (Somerfield – 2006)	24	27	12	10	0

Outlet (%)	1997	2006	2009	2015	2022
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

7.11.6 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 7.10 Stores Visited for Main Food Shop



7.11.7 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 7.11 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

7.11.8 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 7.12 Comparison Shopping

%	Monmouth	Other Mon'shire	Internet	Outside County/Other
1st choice clothes, footwear and other fashion goods	13	3	21	63 32% Hereford *14% Bristol Cribbs Causeway*
2nd choice clothes, footwear and other fashion goods	8	2	17	73 *11% Bristol City Centre/Bristol Cribbs Causeway*
Books, music, DVDs and toys	18	3	40	39 *16% Hereford* *13% Bristol Cribbs Causeway*

%	Monmouth	Other Mon'shire	Internet	Outside County/Other
Chemist goods, toiletries and cosmetics	34	7	5	54 *26% Hereford* *11% Bristol Cribbs Causeway*
Furniture, carpets and soft furnishings	19	1	20	60 *16% Hereford* *13%Newport Retail Park*
Household goods, glass, china and tableware	23	3	36	38 *17% Hereford* *11% Bristol Cribbs Causeway*
Electrical goods	2	0	41	57 *22% Newport Retail Park* *11% Hereford*
DIY, hardware and gardening goods	30	6	6	58 *28% Hereford* *9% Bristol Cribbs Causeway*
Banking, financial and legal services	23	3	26	48 *26% Hereford* *9% Bristol Cribbs Causeway*

7.11.9 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.

7.11.10 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.

7.11.11 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.

7.11.12 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.

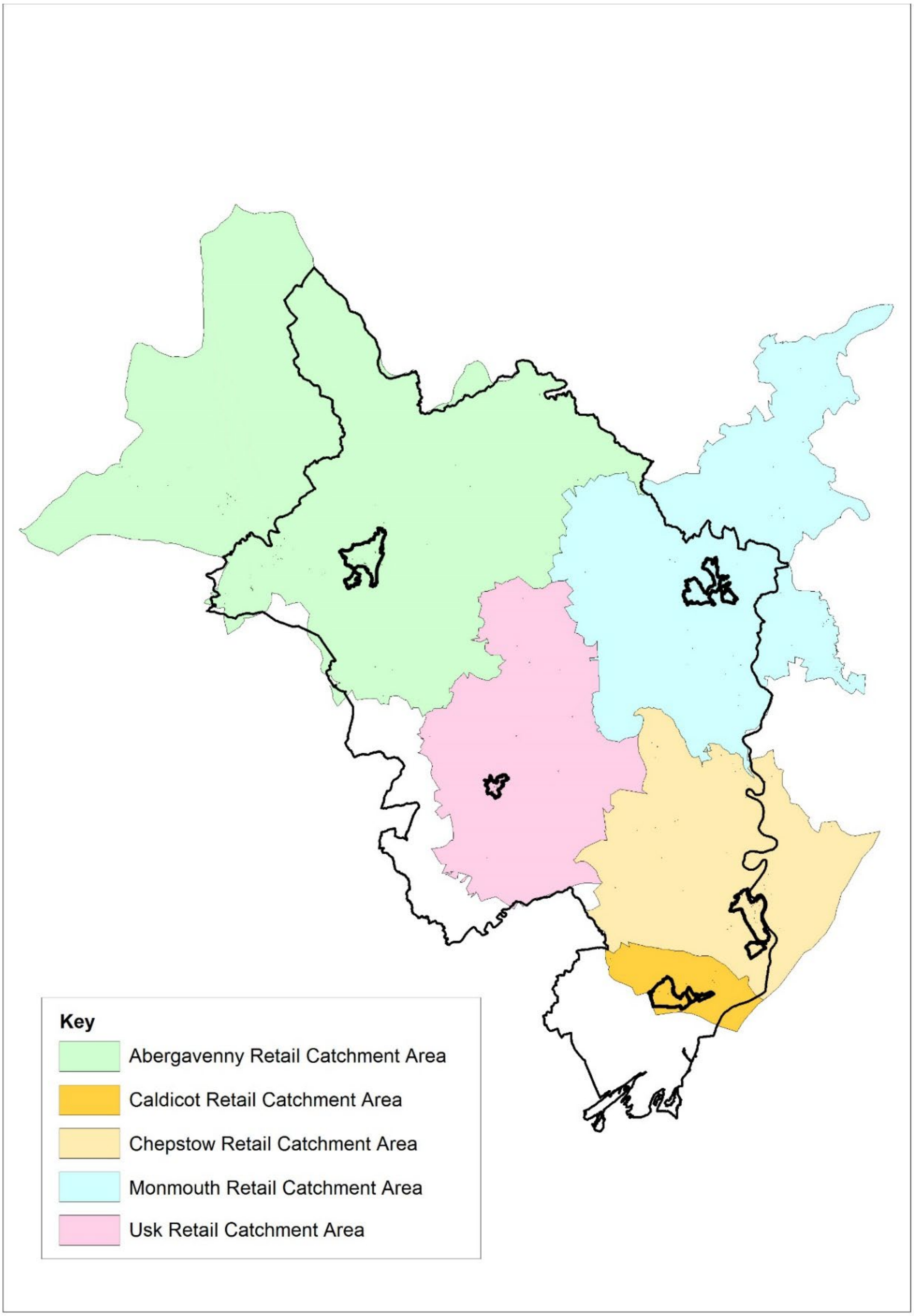
7.11.13 In terms of the respondents' use of museums, art galleries and theatres respondents suggested this varied. However, 19% of respondents suggested they normally visit museums in the town with 5% visiting an art gallery in the town and 26% visiting the theatre in Monmouth. Other than this, the most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

8. REFERENCES

- 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, *January 2016*, Beaufort Research
- Planning Policy Wales Edition 12, *February 2024,* Welsh Government
- Technical Advice Note 4: Retail and Commercial Development, *November 2016,* Welsh Government

9. APPENDIX A

9.1 Retail Catchment Areas



10. APPENDIX B

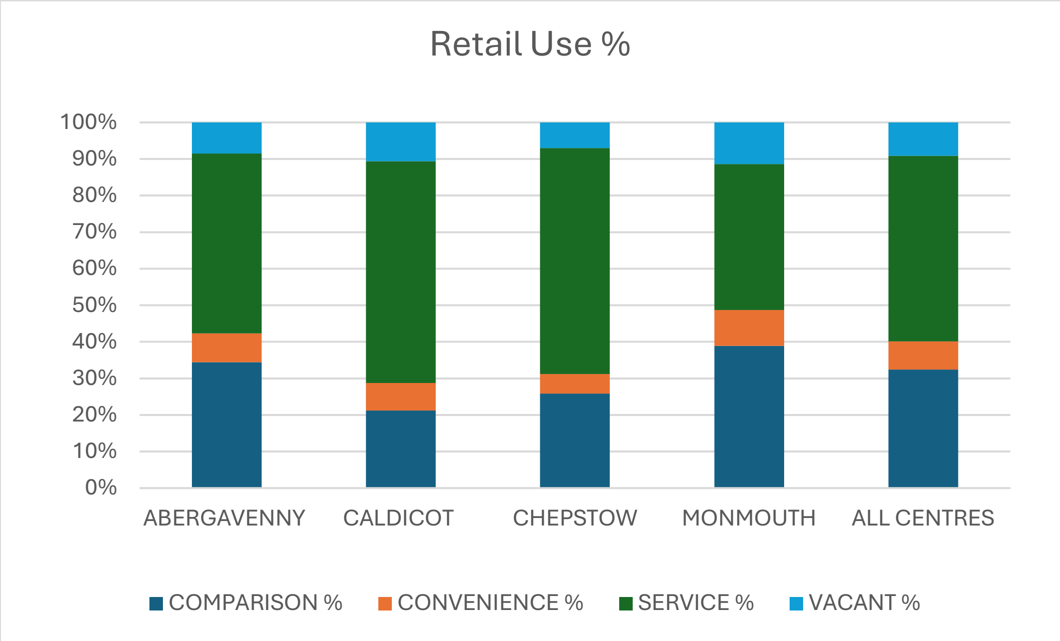
10.1 Paycheck Data (2021)

	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		

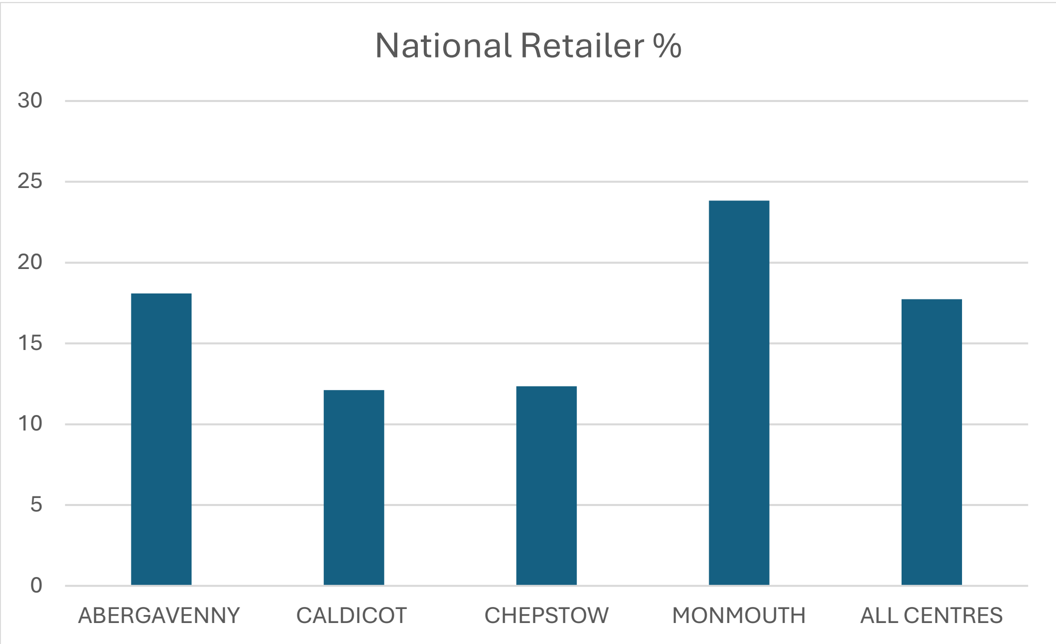
11. APPENDIX C

11.1 Comparison of Survey Results of County Towns

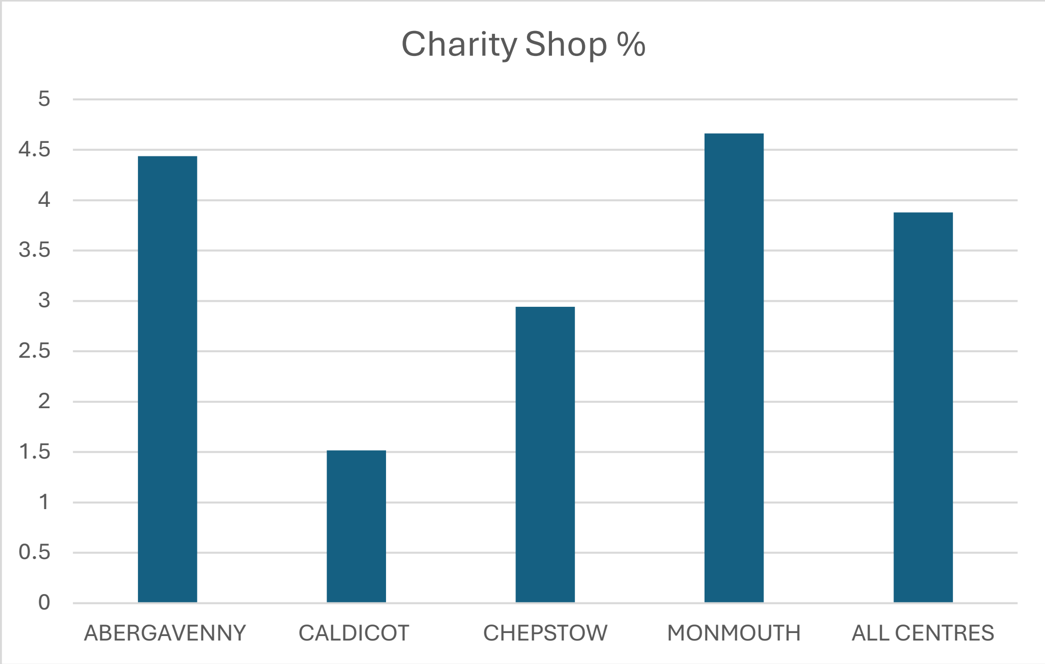
Retail Use % (2025)



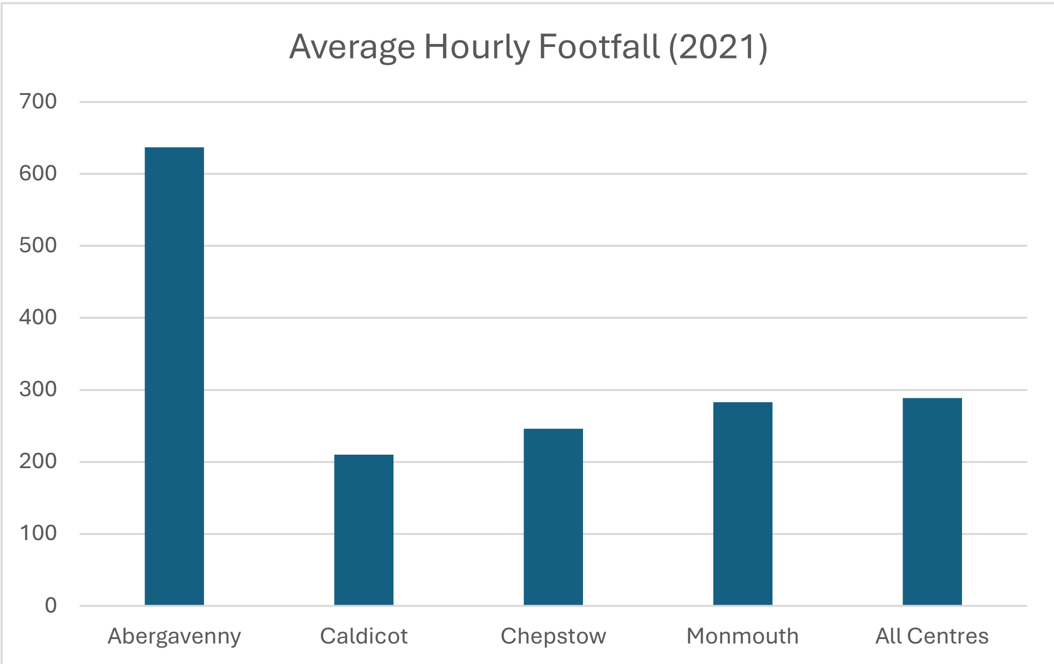
Representation of National Retailers in Units within CSAs (2025)



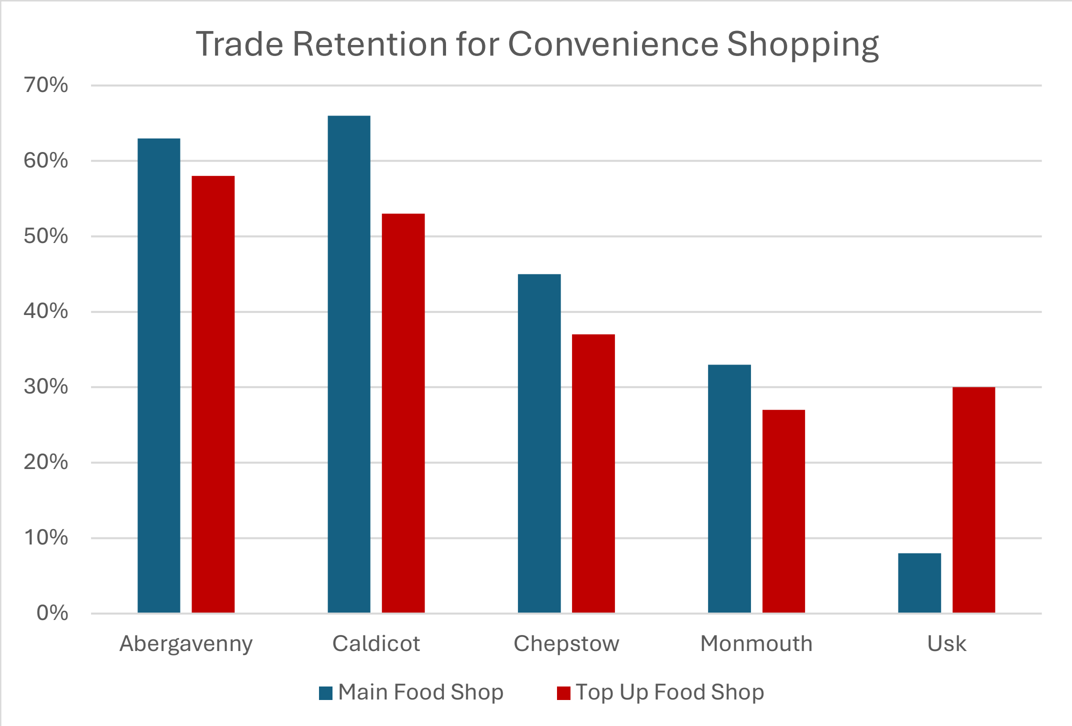
Representation of Charity Shops (2025)



Average Hourly Footfall (2021)



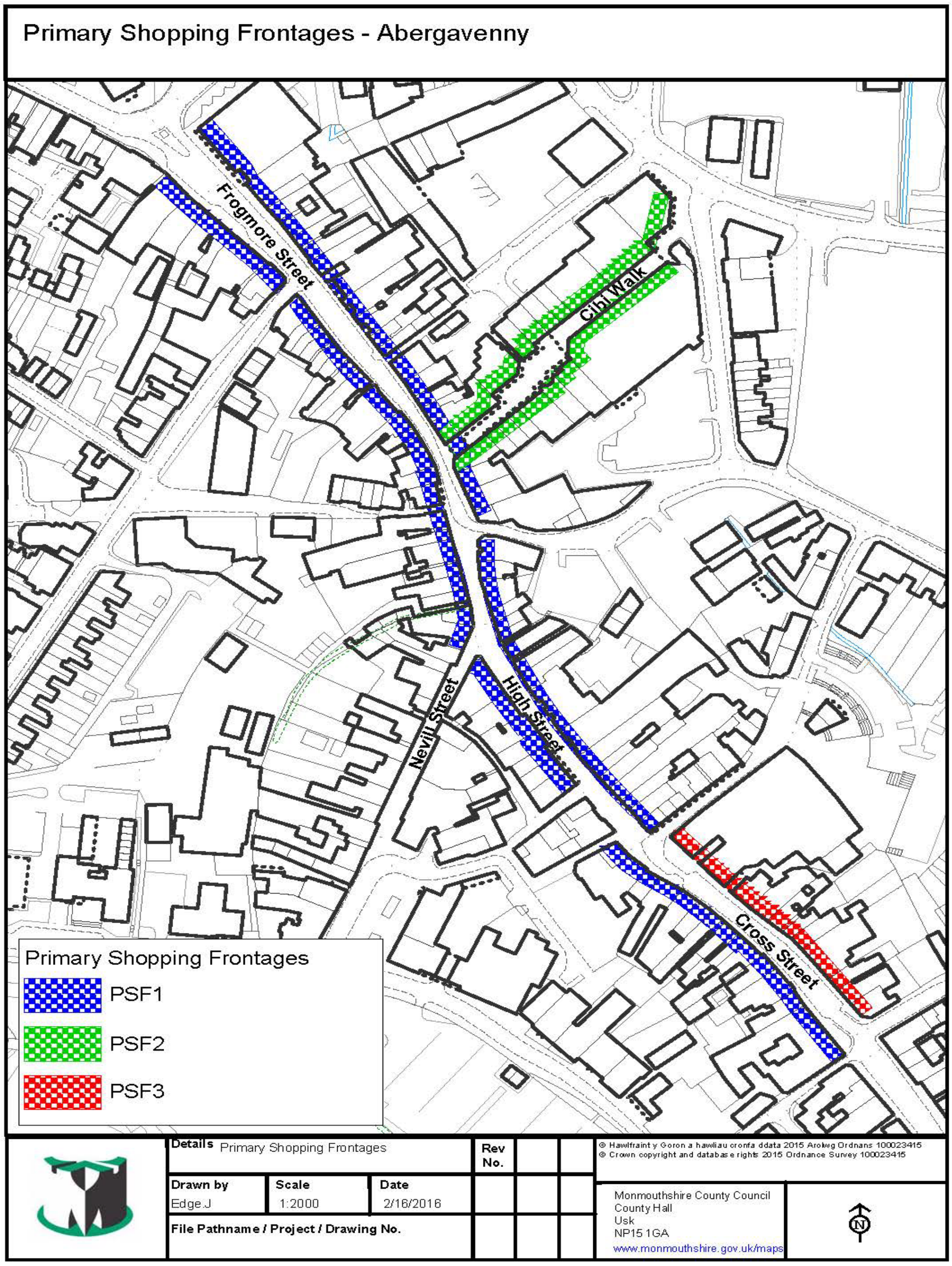
Trade Retention by Town for Convenience Shopping (%)



12. APPENDIX D

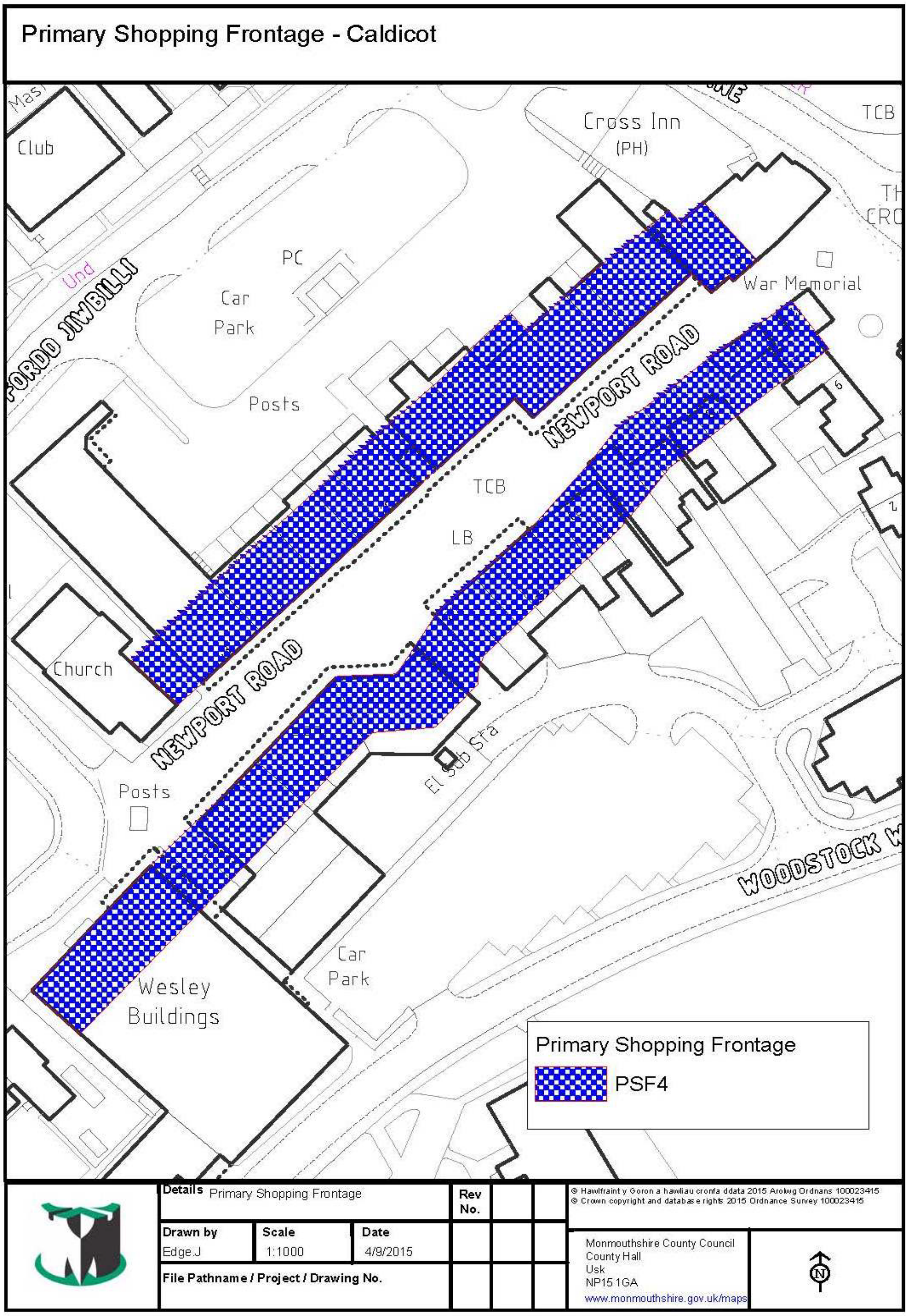
12.1 SPG Primary Shopping Frontages and Maximum Thresholds for Non-A1 Uses

Abergavenny



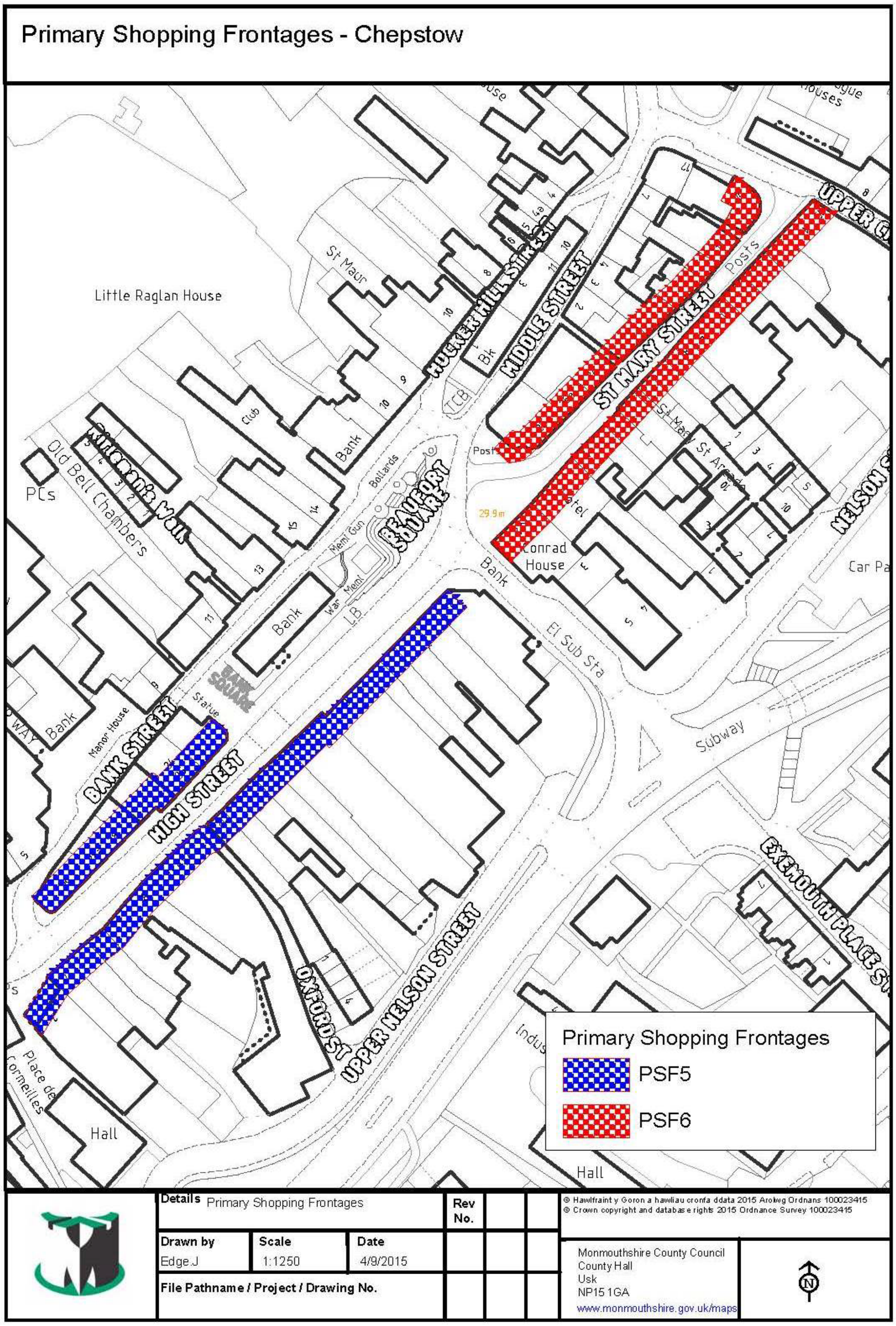
Primary Shopping Frontage		Maximum % of Non-A1 Units
PSF1	Cross Street, High Street & Frogmore Street	25%
PSF2	Cibi Walk	0%
PSF3	Cross Street (51-60 & Town Hall)	45%

Caldicot



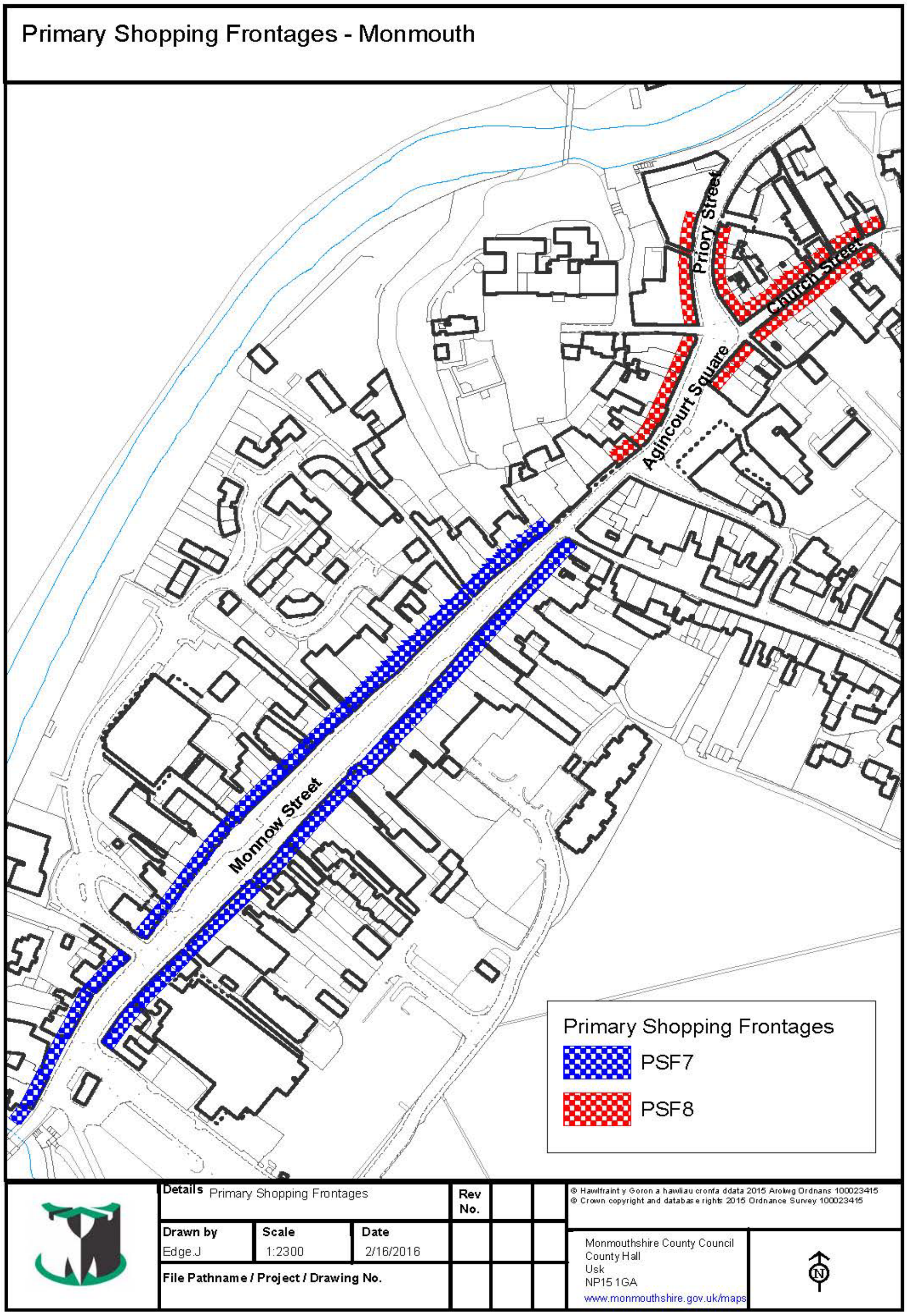
Primary Shopping Frontage		Maximum % of Non-A1 Units
PSF4	Newport Road (7-43 & 14-Wesley Buildings)	35%

Chepstow



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

Monmouth



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