Monmouthshire
Town Centre / Retail Study
2024

JWPlanning

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1 Introduction

Scope and Content of Report

1.1 This report has been prepared by JWPlanning, in accordance with instructions from Monmouthshire County Council (MCC). Its purpose is to assist formulation of the Replacement Local Development Plan (RLDP) policies in respect of the town centre/retail evidence base. The RLDP has been subject of significant delay. Hence the need for an update of earlier advice provided to the Council in the following JWP documents:

- CSA and Frontages Report July 2020 (2020 CSA/Frontages Report)
- Monmouthshire Retail Expenditure Forecasts Update July 2020 (2020 Expenditure Report)

1.2 The content of this report follows discussions with MCC planning officers on the RLDP requirements, having regard to current circumstances. Its focus is to provide advice on the performance of the County town/retail centres and to comment on an appropriate planning policy framework to support the centres. This Report draws on the most recent information on County shopping patterns and Centre audits undertaken by MCC.

1.3 The retail expenditure forecasts in our 2020 Expenditure Report showed the key issue affecting centres is loss of expenditure to centres elsewhere and internet purchases, rather than the overall levels of expenditure available within centre catchments. No requirement for new development plan shopping allocations were identified.

1.4 Current retail trends and the latest information on population and housing forecasts for the County indicate that these circumstances have not changed. Nationally there is now a surfeit of retail floorspace, particularly in in town centres. This situation applies also in Monmouthshire.

1.5 During preparation of the report, Topic Papers were prepared for discussion with Council officers, enabling some issues / findings to be addressed by officers during preparation of the draft RLDP policies.

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1.6 The requirements of the RLDP are set out in Planning Policy Wales published in February 2024 (PPW12). This contains national guidance for both plan-making and development management. Guidance on ‘Retail and Commercial Development’ is provided in Section 4.3. We identify PPW12 requirements and guidance when advising on issues facing the Centres and appropriate policy responses for the RLDP.

Content

1.7 Sections 1-6 of the report cover generic planning policy issues relating to the County as a whole.

1.8 In Section 2 we describe the County centres, noting their different characteristics and catchments, and how they are influenced by market trends affecting town centres and retailing generally.

1.9 Section 3 addresses the hierarchy of centres in the County, as set out in Policy S6 of the LDP. Some changes to the hierarchy are proposed for consideration by officers. The desirability of including policy reference to 'Town Centres' is also raised related to sequential approach requirements.

1.10 Section 4 considers 'retail need' within the County having regard to PPW12 requirements. The latest information relating to assumptions and inputs to the earlier JWP forecasts are examined (2020 Expenditure Report).

1.11 Section 5 reviews CSA and frontage policies and suggests some possible policy amendments to differentiate between the requirements of the different types of centre.

1.12 Section 6 reviews the sequential approach and impact tests required by PPW12. It also suggests some possible policy amendments to differentiate between the requirements of the different types of centre.

1.13 Sections 7-13 provide an analysis of the health and performance of all the County centres (Abergavenny, Caldicot, Chepstow, Monmouth, Usk, Magor, and Raglan), drawing on the most recent information sources, in particular survey information from the Focus household interview surveys undertaken in February 2022, and MCC Retail Background Paper 2024.

2 The Monmouthshire Centres

Description of the Centres

2.1 The centres covered in this Report are Abergavenny, Monmouth, Chepstow, Caldicot, Usk, Magor, and Raglan. With the exception of Magor and Raglan, detailed and historic information on the centres is provided in MCC Retail Background Papers, the most recent version of which was published in January 2024. We seek not to reiterate the findings set out in the Background Papers.

2.2 The largest centres are Abergavenny, Monmouth and Chepstow, all of which are historic centres, serving long established rural catchment areas. The 2021 Census shows Abergavenny having a population of 13,691, Monmouth 10,317, and Chepstow 11,934. The centre catchments mostly lie within Monmouthshire County. However, Abergavenny also serves areas outside the County to the west including Crickhowell. Monmouth's catchment extends outside the County to the east into the Forest of Dean. Chepstow's catchment extends to the east of the River Wye, Tutshill and Sedbury.

2.3 In 2021, Caldicot had a slightly smaller catchment population of 9,813. However, it has a much smaller planned centre than the three larger towns, which was designed to serve Caldicot's surrounding housing areas.

2.4 Usk is a small historic centre serving a long-established rural catchment. It had a much smaller population of 2,629 in 2021.

2.5 Both Magor (population of 5,944 with Undy in 2021), and Raglan (population of 2,433 in 2021) contain smaller centres. Magor centre serves large areas of relatively modern housing. Raglan is more akin to a village centre.

Market Trends

2.6 The well-being of retail shops and services is directly related to the performance of the national economy. This was illustrated starkly from 2020-2021 during the Covid pandemic, when retail spending was severely curtailed. Not only did the pandemic adversely affect the national economy and consumer spending, it also severely limited personal contact and travel possibilities. This created a double blow for 'High Street' retailing. The decline of consumer spending in 2020-2021 is referred to in section 4 of this report. Restrictions on personal contact meant the 'High Street' was able to attract a smaller proportion of the declining available expenditure. Internet purchases and 'Home delivery' suddenly became the norm.

2.7 The effect on convenience shops was less than for some comparison outlets. This was because many traders providing 'Home delivery' were continuing to source goods from physical shop floorspace. For many comparison shops this was not the case. The internet was used by consumers to compare and choose products which were then drawn from warehouses.

Town Centres / Market Towns

2.8 In our 2010 Retail Report, we drew attention to circumstances affecting 'market towns'. We considered that Abergavenny, Chepstow and Monmouth were akin to 'market towns'.

2.9 We noted that as disposable incomes rise an increasing proportion is spent on discretionary and luxury items. Shops selling quality and fashion related products therefore expanded disproportionately, relative to other forms of comparison trading (household goods, etc). This was coupled with a large increase in the spending power of the younger age groups who are the most fashion conscious.

2.10 The stronger emphasis on quality and fashion products coupled with increased mobility favoured larger centres over smaller centres. The smaller centres and market towns were losing market share and seeing less new development than the overall rate of expenditure growth could have supported.

2.11 The loss of retail spending in the market towns is now being offset to a significant degree by an increase in spending on food/drink; services e.g., hair/beauty salons; health/fitness studios, etc; and leisure uses. This is part of a national change, with these uses playing an increasingly strong role in supporting the vitality and viability of centres. All of the Monmouthshire centres have experienced an increase in the number of service uses over the period 2010 to 2023, see Sections 7-13 below.

2.12 Two post-pandemic trends may be offering some respite for the smaller centres and market towns. The first is the growth of ‘Home working’ which encourages some consumers to shop and use eat/drink and leisure facilities close to home, rather than use facilities in the larger employment centres during the working day. Second, there is some evidence that visitor spending is recovering well in those parts of the country attractive to tourism. This appears to be arising from long-distance travel being more challenging, and a more sustainable approach to travel / leisure trips generally. This of relevance to the three principal visitor centres in Monmouthshire – Abergavenny, Monmouth and Chepstow. We address visitor spending in Monmouthshire in Section 4 of this report.

2.13 The latest Focus 2022 Shopper Interview Surveys and earlier Beaufort 2015 Surveys are of particular value in enabling some of these changes in the Monmouthshire centres to be observed over time.

Convenience Trading

2.14 For a considerable number of years convenience trading has been dominated by a few well-established multiple retailers trading from large foodstores, often in out-of-centre locations because of the desire for large sales areas and ample at-level car parking. This in large part gave rise to the competitive pressures experienced by small independent convenience traders in in-centre locations.

2.15 The small independent traders most able to compete were those offering specialist products and services. These were often in those centres with more affluent catchment populations, where shoppers’ choices of product were more diverse and less driven by price.

2.16 More recently there has been some change in shopping habits with some shoppers making more frequent shopping trips. There has been some move away from the very large sales area supermarket formats that are driven by customers making large quantity purchases at infrequent intervals.

2.17 More frequent shopping trips can provide greater opportunities for in-centre (or edge-of centre) locations where accessibility by all forms of transport is greater, and more modest store sizes may be achievable/viable. Greater home working may also explain a move to more frequent shopping trips.

2.18 Significant competition has been experienced recently by the mainstream foodstore multiples as a result of the strong performances by discount foodstores, most notably ALDI and Lidl. This is reflected in the strong growth of the published sales densities of discount stores over recent years, bringing them more into line with some mainstream foodstores. Primary characteristics of discount foodstores are a more limited product range requiring less floorspace than the large foodstores and very competitive prices. Traditionally the discount foodstores focussed on the 'price conscious' shopper. The introduction of some quality products has now widened the appeal of the discount stores to the more discerning and affluent shoppers. These stores now compete effectively with the mainstream supermarkets at the quality end of the market as well as the 'price conscious' shoppers.

Comparison Trading

2.19 As noted above, comparison goods spending is linked strongly to the performance of the national economy. This is in part because some elements of comparison goods spending are discretionary. The COVID pandemic had a major impact on comparison goods spending and 'High Street' shops in particular. In Section 4 we describe the post-pandemic recovery of spending from the low levels experienced in 2020-21. Forecasts of future comparison spending growth remain modest compared with the pre-pandemic forecasts.

2.20 A characteristic of comparison goods retailing is volatility resulting from changing consumer preferences and fashions. Traditionally this volatility has been associated more with the independent shops that are smaller and less resilient. The presence of multiple shops has been seen as an indicator of the strength of a centre. However, it has become evident that the multiple sector can also be vulnerable as spending and trading patterns change. The difficulties of the department/variety store sector are well known, as evidenced by the demise of Debenhams, BHS and C&A (in the UK). Other well-established traders such as John Lewis and Marks & Spencer are undertaking major rationalisation of stores. The recent demise of Wilko is likely to lead to shop closures in centres throughout the country.

2.21 The difficulties experienced by comparison goods traders have had a disproportionate adverse effect on the 'High Street'. Department stores and large variety stores have been a traditional footfall attractor in the 'High Street', as have some other comparison goods shops, in particular in the 'Clothing, Footwear and Fashion goods' sector. Loss of key traders can be most damaging in the smaller centres, where they have played an important role in attracting shoppers to the centre. Their replacement by other uses that can maintain the attractiveness of the centre is an important issue facing many centres. This situation is also relevant to the Monmouthshire centres, within which the changes taking place are helpfully described in the MCC Annual Retail Background Papers.

3 Centre Hierarchy

Policy Requirements

3.1 The need for development plans to define a hierarchy of centres is stated in PPW12, 2024. It is also implicit in Policy 6 of 'Future Wales' 2021.

Future Wales - The National Plan 2040, 2021

3.2 Policy 6 of the National Plan states:

"Policy 6 – Town Centre First

Significant new commercial, retail, education, health, leisure and public service facilities must be located within town and city centres. They should have good access by public transport to and from the whole town or city and, where appropriate, the wider region. A sequential approach must be used to inform the identification of the best location for these developments and they should be identified in Strategic and Local Development Plans."

Planning Policy Wales Edition 12, 2024

3.3 Paragraph 4.3.2 of PPW12 states:

"Retail and commercial centres should be identified in development plans and include established city, town, district, local, village and neighbourhood centres, which provide a range of shopping, commercial and leisure opportunities as well as places of employment, education, civic identity and social interaction. ………"

LDP Hierarchy of Centres

3.4 Centre definitions are set out in LDP paragraphs 5.35-44 and strategic Policy S6, which states:

"Retail Hierarchy

The hierarchy of retail centres in Monmouthshire is defined below. All new or enhanced retail and commercial developments will be focused on the County's main towns – Abergavenny, Caldicot, Chepstow and Monmouth - and in local / neighbourhood centres, and should be consistent in scale and nature with the size and character of the centre and its role in the retail hierarchy. Proposals which would undermine the retail hierarchy will not be permitted.

County Towns

Abergavenny, Caldicot, Chepstow, Monmouth

Local Centres

Magor, Raglan, Usk

Neighbourhood Centres / Shops

Abergavenny - Hillcrest Rd, Rother Avenue, The Mardy

Caldicot - West End

Chepstow - Bulwark, Thornwell

Monmouth - Overmonnow, Wyesham, The Albion"

Possible Amendments to the Hierarchy

3.5 The RLDP provides the opportunity to consider whether the LDP centre classification remains appropriate in today's circumstances.

Abergavenny, Chepstow, and Monmouth – County Towns

3.6 Plainly the role and offer of Abergavenny, Chepstow, and Monmouth warrant their position at the top of the Centre Hierarchy, and classification as County Towns. They are historic centres that serve long established catchment areas within the County.

3.7 The catchment population (2015) of the three centres was identified within the 2020 Expenditure Report, and the number of retail and service outlets within their CSAs within the MCC Retail Background Paper 2024.

Table 3.1 County Towns Centre catchments and CSA commercial units

Centre	Catchment population 2015	CSA Retail and service units 2023 (inc vacancies)
Abergavenny	32,037	285
Chepstow	27,091	149
Monmouth	23,853	153

Caldicot – Minor County Town?

3.8 We are less sure that Caldicot warrants being classified as a 'County Town' on a par with Abergavenny, Chepstow, and Monmouth. Unlike these towns, it is a relatively modern much smaller centre planned to serve the more recently developed community of Caldicot.

3.9 The LDP (paragraph 5.36) describes Caldicot as having "a more limited retail offer than the other main towns, although it remains an important centre serving the area with a range of facilities." Introduction of the ASDA store has improved Caldicot's offer considerably, drawing some custom from Magor as well as Caldicot residents. However, is not an established centre serving a wide catchment, as are the other three designated County towns.

3.10 The catchment population (2015) of Caldicot and the number of retail and service outlets within its CSA are identified within the 2020 Expenditure Report and the MCC Retail Background Paper 2024 respectively. It can be seen that Caldicot has a significantly smaller catchment population and a much lower number of units within its CSA.

Table 3.2 Caldicot catchment and CSA commercial units

Centre	Catchment population 2015	CSA Retail and service units 2023 (inc vacancies)
Caldicot	13,989	60

3.11 In our opinion Caldicot's offer and its catchment is somewhat akin to that of a 'District Centre', but this designation is usually applied to centres within an urban area that are subordinate to the 'Town Centre'. Plainly this is not the case with Caldicot. Officers may like to consider whether Caldicot could appropriately be classified as a 'Minor County Town'.

Usk – Minor County Town?

3.12 Usk is currently included in the 'Local Centre' category with Magor and Raglan. Usk's retail offer is limited, and in the convenience sector it contains small foodstores only. However, it is a long-established historic centre with a number of services serving its rural catchment area.

Table 3.3 Usk catchment and CSA commercial units

Centre	Catchment population	CSA Retail and service units 2023 (inc vacancies)
Usk	8,298	54

3.13 Despite its historic position within the County, we accept that Usk's small size and more limited offer does not warrant the centre being classified alongside Abergavenny, Chepstow, and Monmouth as a County Town. However, we have some concerns that the designation Local Centre, alongside Magor and Raglan, fails to acknowledge its historic position and services that it provides for its catchment.

3.14 Officers may like to consider whether Usk could appropriately be classified as a 'Minor County Town' (alongside Caldicot). In making this suggestion, we recognise that Usk and Caldicot are very different in character.

Bulwark – Local or District Centre?

3.15 Bulwark lies some two kms to the south of Chepstow town centre and contains a large Lidl foodstore plus a significant number of Class A1 retail units and services. It is currently included in the 'Neighbourhood Centres / Shops' category, which includes a number of very small centres and individual shops only.

3.16 Having regard to its size, the role it performs, and its offer, Bulwark is clearly a higher order centre than the other defined 'Neighbourhood Centres / Shops'. In our opinion it warrants being defined as a Local Centre (alongside Magor and Raglan), or could even be described as a District Centre, subordinate to Chepstow Town Centre.

Magor and Raglan – Local Centres

3.17 We have no comments on the definition of Magor and Raglan as Local Centres'.

Neighbourhood Centre / Shops

3.18 This category embraces a number of small shops and services outside the centres of the four main towns. This is the lowest order of centres, including freestanding shops. We have no comments on the centres included, but we do have some comments about LDP Policy RET3, which sets out policy requirements that must be met by developments in Policy S6 defined 'Neighbourhood Centres'. We address this in Section 6 below 'Sequential Approach and Impact Tests'.

Town Centres

3.19 We have referred above to the requirement of Policy 6 of 'Future Wales', which states "Significant new commercial, retail, education, health, leisure and public service facilities must be located within town and city centres".

3.20 The shopping hierarchy identified in Policy S6 of the LDP and its explanatory text makes no reference to 'Town Centres'. It is therefore difficult to judge how this National Plan requirement should be applied to the classification of centres in the County. We do not suggest that any of the Monmouthshire centres necessarily need to be named 'Town Centre'. However, we do think it would be helpful (and an aid to development management and application of the sequential approach) if the RLDP successor to Policy S6, or its explanatory text, contains guidance as to which of the shopping centres should be regarded as 'Town Centres'.

3.21 The centres of the County Towns of Abergavenny, Chepstow, and Monmouth should clearly be regarded as 'Town Centres'. The smaller centres of Caldicot and Usk might also justify being described as 'Town Centres'. This would be consistent with our suggestion that Caldicot and Usk could be classified as 'Minor County Towns'.

3.22 To facilitate the exercise of development management, it would be normal practice to identify the boundaries of any defined 'Town Centres'. The larger Monmouthshire centres all contain defined 'Central Shopping Areas' (CSAs) (Policy RET2). It is appropriate to consider whether the defined CSAs could be treated as the boundaries of the 'Town Centre'. This is addressed in Section 5 CSAs and Shopping Frontages'.

4 Retail Need

Policy Requirements

Planning Policy Wales 11, February 2021

4.1 PPW identifies the 'Needs Test' which is relevant to development plan making and development management (paragraphs 4.3.13–17).

4.2 The PPW (paragraph 4.3.13 states that:

> *"It is important that communities have access to adequate levels of retail provision. Evidence should demonstrate whether retail provision is adequate or not, by assessing if there is further expenditure capacity in a catchment area (quantitative need) or if there is a lack of retail quality, range of goods or accessibility (qualitative need)."*

4.3 Paragraph 4.3.15 goes on to indicate that:

> *"Precedence should be given to establishing quantitative need before qualitative need is considered for both convenience and comparison floorspace, particularly as a basis for development plan allocations."*

4.4 We have indicated in the Introduction above that our 2020 Expenditure Report found that the key issue affecting the Monmouthshire centres is loss of expenditure to centres elsewhere and internet purchases, rather than the overall levels of expenditure available within centre catchments. No requirement for new development plan shopping allocations was therefore identified, having regard to quantitative and qualitative considerations. This remains the position.

Retail Expenditure Capacity

4.5 The following are the principal factors affecting expenditure capacity.

Population Forecasts

4.6 Population forecasts for the County over the RLDP plan-period 2018-2033 have been provided by Edge Analytics. A full description of the Options assessed is provided in their report 'Monmouthshire – Updating the RLDP Demographic Evidence, November 2021'.

4.7 The Preferred Option adopted for the RLDP assumes a population growth for the County of 9,480 persons representing a percentage increase of +10.9% over the period 2018-2033. The 2020 Expenditure Report, Table 3.1, adopted a County population increase of +12% over the period 2018-2033, i.e., the current County population forecasts are slightly lower than previously assumed. This will affect retail expenditure potential in a downward direction.

4.8 Population forecasts for the County are directly related to new housing needs. The updated RLDP Preferred Strategy makes provision within the County over the period 2018-2033 for 5,400-6,210 dwellings. Having allowed for the existing housing landbank (4,085 homes), this leaves a requirement for new allocations of 1,660-2,125 homes, including 830 – 1,065 new affordable homes.

4.9 In order to meet the identified new housing needs within the County, the Preferred Strategy (2023 Update), page vi, paragraph xii, identifies four major housing allocations at Abergavenny East (approx. 500 new homes); Mounton Road, Chepstow (approx. 145 new homes); Leasbrook, Monmouth (approx. 270 new homes); and Caldicot (approx.735 new homes).

4.10 We consider any retail need implications arising from these new housing allocations in our assessment of the individual centres (Sections 8 to 13).

Retail Expenditure per head

4.11 The retail expenditure forecasts in our 2020 Expenditure Report were based on national estimates of retail expenditure per head growth contained in 'Experian, Retail Planner Briefing Note 16, December 2018.' These showed an annual average increase in the period 2021-33 of convenience goods of +0.1% and of comparison goods of +3.3%.

4.12 The COVID pandemic caused a major downturn in retail expenditure per head in 2020-21, since when there has been some recovery towards pre COVID levels. The most recent Experian report Retail Planner Briefing Note 20 was published in February 2023. If allowance is made for the impact of increasing internet sales (see below), the latest national expenditure per head forecasts leave no potential for growth of convenience goods expenditure (in shops) over the next 5 years (2023-2028); and more limited comparison goods sales per head than was previously forecast. Changes in retail expenditure per head forecasts since the 2020 Expenditure Report have affected retail expenditure capacity forecasts in a downward direction.

Special Forms of Trading (Internet)

4.13 The 2020 Expenditure report noted that use of the internet is having a major impact on shopping patterns and its influence is growing. It also noted that usage of the internet varies significantly by retail sector as well as by location.

4.14 Table 3.4 of the 2020 Expenditure Report showed estimates of internet usage for convenience and comparison goods based on Beaufort Survey findings for 2015 and Experian forecasts up to 2033 (Experian Retail Planner Briefing Note 16). The Experian forecasts indicated that by 2033 'Adjusted' convenience goods Internet sales would represent 5.7% of total sales, and comparison goods sales 21.6% of total sales.

4.15 Experian's 'Adjusted' internet sales exclude internet sales that are sourced from shop floorspace and that do not therefore remove the need for retail floorspace. They are not therefore directly comparable with the Beaufort/Focus internet figures based upon interviewee responses. However, the Beaufort/Focus surveys are valuable because they provide information on all goods sectors that it is directly comparable over time (2015 and 2022) for the County and individual centres.

4.16 Table 4.1 below, derived from the Focus Survey 2022 and Beaufort Survey 2015, shows the growth of internet usage over the 2015- 2022 period within the County on a comparable basis for separate goods sectors.

Table 4.1 Internet Usage in the County 2015-2022

Sector	2015	2022
Main Food	5%	6%
Clothing, footwear and other fashion goods	12%	24%
Books, music, DVDs and Toys	46%	43%
Chemist, toiletries, cosmetics, etc	3%	5%
Furniture, carpets and soft furnishings	21%	24%
Computers, TVs	37%	42%
Household Good, etc	14%	17%
DIY, hardware, gardening, etc	7%	8%
Banking, financial and legal services	27%	30%

Source: Focus Consumer Habits Survey 2022 and Beaufort Consumer Shopping Survey 2015

4.17 Use of the internet for 'Main Food' purchases has changed little over the 7-year period (5% and 6%). However, there are significant variations within the comparison goods sector. The greatest use of the internet is for purchases within the 'Books, music, DVDs and toys' sector at 43% in 2022. This is followed by 'Banking, financial and legal services' at 30%. Unsurprisingly the lowest sector is Chemist, toiletries, cosmetics, etc at 5% only.

4.18 The goods sector of most relevance to the health and performance of the County Towns is 'Clothing, Footwear and other Fashion goods'. The survey responses indicate that since 2015 use of the internet for this goods sector has doubled since 2015 to 24% of total sales. This will clearly have had significant implications for shop trading potential in this sector in the County Centres.

4.19 Overall, it is clear that increasing use of the internet for comparison goods purchases will have reduced the expenditure capacity for new comparison shop floorspace within the County and its centres.

Centre Market Shares and Residents' Expenditure Loss

4.20 In addition to levels of internet spending described above, the Focus 2022 and Beaufort 2015 Surveys provide valuable information on the performance of the County Centres in terms of the market shares of residents' expenditure retained by the centres, and expenditure lost to centres elsewhere (within and outside the County). The Surveys cover Monmouthshire residents only and information on expenditure inflows to Monmouthshire centres from outside the County has to be drawn from other sources, in particular the County commissioned STEAM reports.

4.21 The market shares of catchment expenditure retained, and expenditure lost to other centres varies greatly between the centres. This is particularly the case for comparison shopping where the strength of offer is much more limited in the smaller centres. Convenience shopping patterns are more localised, with less expenditure loss to distant destinations. We examine Centre market shares and expenditure loss from catchments for each of the County centres in Sections 8-13 below.

4.22 We note in this section the principal destinations of comparison goods expenditure of County residents a whole. The Focus 2022 report shows the destinations of residents' expenditure for each goods category in percentage terms. Because expenditure between goods categories varies significantly, the percentage figures cannot be converted to figures for comparison goods as a whole without undertaking a full expenditure analysis.

4.23 The best goods category indicator of the health and performance of centres is 'Clothing, footwear and other fashion goods', for which we show County-wide information in this section, as well as information for the individual centres in Sections 8 to 13.

4.24 Table 4.2 below is derived from the findings of Table 6 of the Focus 2022 Report. It shows the most popular destinations for County residents of 'Clothing, footwear and other fashion goods' purchases in 2015 and 2022. In 2022 approximately 66% of residents' visits were to destinations outside the County, Bristol, Newport, and Hereford. Almost one third of visits were to Bristol. Abergavenny and Monmouth were in the top 5 (4 and 5 respectively). It is also noticeable that all of the Top 5 destinations increased their percentage score between 2015 and 2022.

Table 4.2 County Residents' Destinations Clothing, footwear and other fashion goods

	2015	**2022**
Top 5 Destinations		
1 Bristol Cribbs Causeway and City Centre	31%	32%
2 Newport Retail Park and Town Centre	10%	19%
3 Hereford City Centre	5%	15%
4 Abergavenny Town Centre	8%	13%
5 Monmouth Town Centre	2%	10%
Other Destinations		
Cardiff City Centre	18%	8%
Ross on Wye DOC	0%	6%
Chepstow Town Centre	1%	5%
Cwmbran Town Centre	13%	5%

Source: Focus Consumer Habits Survey 2022, Table 6

4.25 Focus has combined the responses relating to 'main' and 'occasional' visits. This means that caution must be exercised in interpreting the results, particularly over time. A switch from a 'main' visit to an 'occasional' visit could have significant expenditure implications, but this is not identified. The table does, however, show the continuing importance of Bristol (Cribbs Causeway and City Centre) as destinations. The attraction of Cardiff as a destination appears to have declined since 2015, whereas Hereford has increased.

4.26 Plainly the loss of expenditure to non-County destinations will vary significantly from the different Monmouthshire centres, which we address in Sections 8-13. However, Table 4.2 confirms that there is substantial comparison goods expenditure leakage from the County.

Visitor Expenditure

4.27 Judgements were made in our 2020 Expenditure Report on inflows of expenditure from outside the County. The principal source of information was the STEAM report 2018. The STEAM reports are published annually for the County Council and provide data on the economic impact of visitors in terms of employment and revenue.

4.28 The latest STEAM report 2022 provides figures for 2022 as well as changes since 2011. We outline these changes below. Table 4.3 shows the growth of day and staying visitors since 2011. It can be seen that from 2011-2019 the growth of day visitors was limited, but that staying visitors increased by 25%, although from a lower base figure. Plainly staying visitors have a bigger impact on the local economy than day visitors. The COVID pandemic had a drastic effect on both day and staying visitor numbers. However, the figures for 2022 show a significant recovery, with the day visitors up by 2.3% since 2019, and staying visitors almost on a par with the 2019 figure.

Table 4.3 Monmouthshire County Visitor Numbers 2011-2022

	2011	2019	2011-19 % Change	2020	2022	2019-2022 % change
Day Visitors	1.65m	1.72m	+4.2%	0.3m	1.76m	+2.3%
Staying Visitors	0.46m	0.60m	+25%	0.12m	0.58m	-0.33%

Source: Steam Report 2022, pages 10 and 15

4.29 The sectors of visitor spending of most relevance to the vitality of the town centres are ‘Shopping’ and ‘Food and Drink’. Table 4.4 below shows changes in these sectors over the period 2011-2022.

Table 4.4 Monmouthshire County Visitor Expenditure on Shopping and Food/Drink (2022 prices)

	2011	2019	2011-19 % change	2020	2022	2019-22 % change
Shopping	£29.23m	£30.79m	+5.3%	£9.3m	£33.94m	+10.2%
Food and Drink	£38.75m	£42.15m	+8.8%	£13.76m	£46.3m	+9.8%

Source Monmouthshire STEAM Report 2022, page 53

4.30 The figures show a modest level of growth over the 2011- 2019 period, leading to an increase of over 5% per annum over the period on shopping, and just under 9% over the forecast period for food and drink. Spending was severely impacted in 2020 by the COVID pandemic. However, the latest 2022 figures show a good recovery with shopping expenditure being over 10% above the 2019 figure and food and drink being almost 10% above the 2019 figure.

4.31 The STEAM reports show that visitor spending is an important component of the County economy. However, the reports provide figures for the County as a whole and are therefore of limited assistance in estimating visitor spending in the individual centres. There are clearly significant differences between the Monmouthshire centres in terms of the impact of visitor spending, for example between Monmouth and Caldicot.

Findings

4.32 Our assessment of the principal factors affecting retail expenditure capacity within the County and its centres confirms that there will be more limited expenditure growth available to support shop floorspace within the Monmouthshire centres than was previously forecast.

4.33 New housing allocations will generate additional expenditure, which for convenience goods needs will require to be satisfied within local catchments.

4.34 It must be assumed that for the purchase of comparison goods use of the internet will continue, and that for sectors such as 'Clothing Footwear and Fashion goods', this will provide a strong challenge for centres.

4.35 The recent recovery and hopefully continuing growth of visitor numbers and spending within some centres, does provide some opportunity for regeneration and improvement of centres. This needs to be recognised in planning policies for centres that are attractive to visitors, particularly those policies relating to the acceptability of different uses and appropriate locations for them within centres.

5 CSAs and Shopping Frontages

5.1 The 2020 CSA/Frontages report provided advice to the Council on Central Shopping Area CSA and primary shopping frontage (PSF) policies within adopted LDP and Primary Shopping Frontages SPG 2016. Advice and suggestions for consideration by officers were put forward for the individual County centres.

5.2 In this report we provide further comment on the generic policy issues only. We do not reiterate previous advice relating to the CSAs and frontages within the centres, other than to summarise some key points made in Sections 8-13 below relating to the centres. In particular, it has been agreed that no further advice is required in this report on the geographic boundaries of any defined CSAs and PSFs.

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5.3 National policy guidance on centre / frontage definitions and boundaries is set out in PPW12.

5.4 Paragraph 4.3.2 of PPW12 states that *"Retail and commercial centres should be identified in development plans …..*". Paragraph 4.3.10 goes on to indicate that centre boundaries should be indicated on the Proposals Map:

> *"Planning authorities should establish a hierarchy of retail and commercial centres in their development plan strategy, identifying boundaries on the proposals map."* (our underlining).

5.5 Guidance on Mixed Uses and Primary and Secondary Shopping Areas is provided in paragraphs 4.3.30 – 4.3.39. Paragraph 4.3.30 indicates the role of Class A1 retailing within centres:

> *"Although retailing (A1) uses should underpin retail and commercial centres, it is only one of the factors which contribute towards their vibrancy".*

5.6 Paragraphs 4.3.32 - 4.3.34 indicate the following requirements of development plans:

> *"Policies should encourage a diversity of uses in centres. Planning authorities should identify which retail and commercial centres in their development plans have primary and secondary shopping areas, and show these on the proposals map"* (our underlining).
>
> *Vibrant and viable centres are distinguished by a diversity of activity and uses which should contribute towards a centre's well-being and success, whilst also reducing the need to travel. Development plans should include policies describing the types of use that are likely to be acceptable in primary and secondary areas* (our underlining).
>
> *Leisure and entertainment, and food and drink uses can benefit retail and commercial centres, and with adequate attention to safeguarding amenities can contribute to a successful evening economy. In addition to general diversity of uses, mixed use developments, which combine retailing with entertainment, restaurants and, where appropriate, residential in a comprehensive and planned way should also be encouraged where appropriate to promote lively centres during both the day and the evening."*

5.7 We go on below to consider how these national policy requirements are currently applied in the Monmouthshire LDP.

Central Shopping Areas

LDP Policy RET2 'Central Shopping Areas'

5.8 LDP Policy RET2 designates CSAs in Abergavenny, Caldicot, Chepstow, Monmouth, Magor, Raglan and Usk. The Policy states that within the CSAs, subject to detailed planning considerations, the following policy criteria apply:

> *"a) proposals which will safeguard the vitality, attractiveness and viability of the defined CSAs will be permitted;*
>
> *b) a change of use from Classes A1, A2 or A3 on the ground floor with street frontage to uses other than Classes A1, A2 or A3 will not be permitted, unless it can be demonstrated that criterion (a) can be met by attracting footfall;*
>
> *c) change of use to residential of ground floor premises will not be permitted unless evidence is provided to demonstrate that the premises is not viable for retail or commercial use, including that the premises has been vacant for at least one year and that genuine attempts at marketing the existing use have been unsuccessful."*

5.9 Currently the policy applies to centres of very different sizes and offer, and we question whether a blanket policy should be applied to such a diversity of centres. We have made some suggestions in Section 3 above regarding the status of the Monmouthshire Centres and those that might be considered 'Town Centres'. We have recommended that the centres of the County Towns of Abergavenny, Chepstow, and Monmouth warrant the status of 'Town Centre'. We have also suggested that the centres of Caldicot and Usk could be considered as 'Minor County Towns', and might therefore warrant the status of 'Town Centre'.

5.10 We have also concluded that because of their limited size and offer, the Local Centres of Magor and Raglan do not warrant the description 'Town Centre'. Likewise, we have reservations about the appropriateness of defined Policy RET2 CSAs within these centres. In Raglan in particular the centre is spread and ill-defined as an entity. In Magor, the centre is more compact and coherent, largely due to historic buildings and its conservation area character, but in both cases the defined centres do contain ground floor non-commercial uses.

5.11 We accept that the Officers may wish to retain some policy protection for retail and commercial uses within the Local Centres (Bulwark, Magor and Raglan). Such policy protection is provided by Policy RET3, but currently this applies to 'Neighbourhood Centres' only. We address Policy RET3 in Section 6 below. In the absence of a CSA in Local Centres, it may be necessary to define some centre boundary within which any protection policy applies.

5.12 It appears to us that the existing CSAs represent in broad terms the 'Town Centre' of the respective towns. If this is accepted, the 'Town Centre' boundaries could be those of the existing CSA (or any amendment of the CSA boundary).

5.13 It is now generally accepted that a wide range of non-retail commercial, leisure and community uses play a key role in supporting the vitality and viability of centres. It could be helpful to include guidance on the full range of 'commercially active uses' (in addition to Class A uses) that are acceptable within CSA non-PSF designated frontages. Such uses should be those that are likely to comply with Policy RET2 criteria a) in safeguarding the vitality, attractiveness and viability of the CSA. Consistent with this, we believe that there could be merit in renaming CSAs to Central Shopping and Commercial Areas (CSCA**)**, which we believe would more accurately reflect the role and offer of the centres.

5.14 Defined CSAs link directly to application of the sequential approach, which seeks to steer retail and commercial development to centres. We comment on this further in Section 6 below 'Sequential Test and Impact Tests'.

Primary Shopping Frontages

LDP Policy RET1 'Primary Shopping Frontages'

5.15 LDP Policy RET1 'Primary Shopping Frontages' notes that PSFs are designated and shown on the Proposals Map in – Abergavenny, Caldicot, Chepstow, and Monmouth centres.

5.16 Policy RET1 states that within the defined frontages "development or redevelopment proposals for Classes A2 or A3 on ground floors, or a change of use on ground floors from Use Class A1 to Classes A2 or A3, will be permitted unless:

a) they would create (or further extend) a continuous frontage exceeding two or more non-A1 units; or

b) they would result in the loss of A1 retail units in prominent locations, corner units or those with long frontages; or

c) the number, frontage lengths and distribution of Class A2 or A3 uses in the frontage create an over-concentration of uses detracting from its established retail character.

Where a proposal fails to meet the above criteria, an exception may be considered provided:

i) it can be demonstrated that the proposed use would not harm the vitality of the street frontage; or

ii) the premises have been vacant for a least 2 years and genuine attempts at marketing the existing use have been unsuccessful.

5.17 In the 2020 CSA/Frontages Report, we indicated that in our opinion a defined PSF in Caldicot may not be justified, and that a defined CSA should be sufficient for management and control of uses within the centre.

Primary Shopping Frontages Supplementary Planning Guidance, 2016

5.18 Further interpretation of the purpose of Policy RET1 and its requirements is provided in 'Primary Shopping Frontages' SPG 2016.

5.19 Paragraph 4.1 of the PSF SPG confirms that the approach taken "is to protect the predominant shopping role and character of the main towns by controlling the loss of retail uses within the primary shopping frontages". Non-retail is defined as all non-Class A1 uses.

5.20 The following considerations are taken to be important in interpreting Policy RET1 requirements:

(a) The distribution of non-retail uses within PSFs;

(b) The location and prominence of premises in PSFs;

(c) The proportion of non-retail uses in PSFs.

5.21 For the purpose of applying the latter criterion, the PSF SPG defines maximum thresholds for non-retail uses within the PSFs. The SPG goes on to accept that there may be exceptions to the application of criteria (a) to (c) above. These are:

(ii) The applicant can demonstrate that the proposed use would not harm the vitality of the street frontage:

(iii) The premises have been vacant for at least 2 years and there have been genuine attempts at marketing the property.

5.22 Both Policy RET1 'Primary Shopping Frontages' and the SPG were published some years ago, since when significant changes have taken place in town centres. In particular, the vitality and viability of town centres is now much more dependent on a variety of non-Class A1 retail uses which can create footfall and enhance the attractiveness of centres. We believe that the Policy RET1 and SPG criteria and tests are too strongly focused on Class A1 retail uses and fail to recognise fully the contribution that role that some non-retail uses can play in making centres attractive.

5.23 We would be happy to discuss further with officers the details of any redrafted CSA and frontage policies or related guidance and tests.

6 The Sequential Approach and Impact Tests

6.1 A fundamental part of national planning policy guidance is to steer new retail and commercial development to 'Town Centre' locations. The mechanism for achieving this is the 'sequential test', supported by 'impact assessments' in respect of retail developments on the edge of or outside designated centres. The principal LDP policy addressing these issues is Policy RET4 'New Retail Proposals', but Policy RET3 'Neighbourhood Centres' does also specify requirements relating to Neighbourhood centres.

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Sequential Test

6.2 Paragraphs 4.3.18-24 of PPW 12 describe sequential test requirements, with the opening paragraph 4.3.18 identifying the 'town centres first' approach:

"The Welsh Government operates a 'town centres first' policy in relation to the location of new retail and commercial centre development. In implementing this policy, planning authorities should adopt a sequential approach to the selection of new sites in their development plan and when determining planning applications for retail and other complementary uses. By adopting a sequential approach first preference should be to locate new development within a retail and commercial centre defined in the development plan hierarchy of centres."

6.3 Paragraph 4.3.21 makes clear that the sequential test should be applied to a wide range of uses:

"The sequential approach applies to retail and all other uses complementary to retail and commercial centres. Other complementary uses include, for example, financial and professional services (A2), food and drink (A3), offices (B1), hotels (C1), educational and other non-residential establishments (D1), leisure (D2) and certain other uses such as launderettes and theatres. ……"

6.4 Paragraph 4.3.21 also makes clear that in applying the sequential test to specific uses regard should be had to the appropriate type of centre (i.e., higher or lower order).

"………. Planning authorities should be flexible in their approach where it is necessary. The nature of a proposed use is likely to determine what type of centre (i.e., higher or lower order centre) is most appropriate as a starting point for the sequential approach process."

Retail Impact Test

6.5 Guidance on retail impact assessments is provided in paragraphs 4.3.25-29 of PPW. The specific technical requirements applying to impact tests is in paragraphs 4.3.26-27.

"All retail planning applications or retail site allocations of 2,500 sq. metres or more gross floorspace that are proposed on the edge of or outside designated retail and commercial centres should, once a need has been established, be supported by a retail impact assessment.

For smaller retail planning applications or site allocations, planning authorities will need to determine whether an assessment is necessary, for example when a smaller proposal may have a significant impact on a centre. Requests for retail impact assessments by planning authorities on smaller developments should be proportionate to potential impacts."

Sequential Test Policies

LDP Policy RET4 – New Retail Proposals

6.6 The principal 'sequential test' policy in the LDP Policy RET4–New Retail Proposals. This draws on PPW12 requirements (formerly in PPW11), stating:

"The preferred location for new retail and commercial leisure /entertainment developments (not covered by Policy RET3 Neighbourhood Centres), including extensions to existing retail premises, will be in the designated Central Shopping Areas (CSAs). Where it can be demonstrated that no suitable sites exist in the CSA, then sites on the edge of the CSA should be considered before finally considering out-of-town sites. Where development outside the CSA is considered the proposal will be assessed against the following criteria:

(a) a demonstrable need exists for the proposed development;

(b) the proposed development, either individually or cumulatively with other recent or proposed developments, would not have a detrimental impact on the trade/turnover, vitality and viability of town, local or neighbourhood centres;

(c) the proposed development is of an appropriate scale and type to the size, character and function of the centre and its position in the retail hierarchy;

(d) the proposed development would not have a detrimental impact on future public or private investment needed to safeguard vitality and viability of the centres;

(e) the proposal is in a location accessible to public transport facilities;

(f) the proposal is not on land allocated for other uses. This especially applies to land designated for industry, employment and housing, where retail development can be shown to limit the range and quality of sites for such uses."

6.7 This policy is consistent with national planning policy guidance. It is supplemented by Policy RET3–Neighbourhood Centres, which draws a distinction between the tests that apply to developments in neighbourhood centres as opposed to town and local centres.

LDP Policy RET3 – Neighbourhood Centres

6.8 Policy RET3 says:

"Development proposals for retail development (Use Class A1) in designated neighbourhood centres will be permitted provided that the development, either individually or cumulatively with other recent or proposed developments, does not undermine the vitality, attractiveness or viability of town or local centres.

Development proposals for financial and professional services (Use Class A2) and food and drink uses (Use Class A3) in designated neighbourhood centres will be permitted provided that the development, either individually or cumulatively with other recent proposed developments, does not undermine the vitality, attractiveness or viability of such centres.

The County's neighbourhood centres and shops are defined in Policy S6 and identified on the Proposals Map. Change of use from Classes A1, A2 and A3 will not be permitted on the ground floor within neighbourhood centres, unless evidence is provided to demonstrate that the premises is not viable for retail or commercial use, including that the premises has been vacant for at least one year and that genuine attempts at marketing the existing use have been unsuccessful."

Possible Changes to Sequential Approach Tests

6.9 We support the need to provide guidance on the types and scale of developments that are acceptable in different types of centre. This accords with PPW12 advice. LDP Policy RET3 distinguishes between 'Neighbourhood Centres' and other centres in applying the sequential test. In our opinion a more helpful distinction would be how the sequential test is to be applied between 'Town Centres' and other centres in the hierarchy.

6.10 Generally higher order retail, commercial and leisure developments, some perhaps having a County-wide catchment, would best be located within the Town Centres of the County Towns - Abergavenny, Chepstow and Monmouth. The Minor Town Centres (Caldicot and Usk) would be appropriate locations for proposed uses having a catchment centred on those towns.

6.11 Neighbourhood Centres are the lowest order of centre without defined CSAs. As such, there may not be justification for applying the sequential test to these centres. Most of the Neighbourhood Centres consist of one or two shops only within residential neighbourhoods.

6.12 We also believe that is worth considering whether there is justification for continuing to have Policy RET2 CSAs for Local Centres (Bulwark, Magor and Raglan), although as raised in Section 5 above officers may wish to give some protection to existing retail and commercial uses within these centres. It may therefore be necessary to have defined boundaries for the centres.

6.13 Our suggestions raise issues on the form and content of policies that, on the one hand give protection to existing retail and commercial uses within centres; and, on the other hand, indicate how the sequential approach is to be applied to different types of centre.

6.14 Our thinking is that sequential approach requirements are best applied to the CSAs of the County Towns in a modified form of Policy RET4, and possibly Minor County Towns if they are to be considered as 'Town Centres'. If the CSAs of the Minor County Centres are not defined as 'Town Centres, a distinction could be drawn between the types/scale of development that are to be steered to them, possibly in Policy RET4 supporting text.

6.15 We would be happy to discuss further with officers the details of any redrafted policies or related guidance.

Retail Impact Test Requirements

6.16 PPW12 requires retail developments of 2,500 sq.m or more floorspace to be supported by an impact assessment. It also indicates that planning authorities may consider whether an impact assessment is justified for smaller retail developments, having regard to the potential impact of the development on centres.

6.17 The LDP Policy RET4 criteria specify matters that are to be addressed when considering the justification for retail and other commercial developments. These requirements are clearly of assistance in determining whether an impact assessment is justified for retail developments smaller than 2,500 sq.m gross floorspace.

6.18 The RLDP could provide clearer policy guidance on the need for impact assessments by specifying floorspace thresholds above which an impact assessment would be required for retail developments outside the CSAs of different types of centre. This is an approach that is adopted by many planning authorities, certainly in England. If officers are interested to pursue this approach, we set out some possible thresholds for discussion.

- County Towns (Abergavenny, Chepstow, Monmouth) – 500 sq.m gross
- Minor County Towns (Caldicot, Usk) – 250 sq.m gross
- Local Centres (Bulwark, Magor) and Raglan if required – 150 sq.m gross

6.19 The content requirement of any impact assessment should be proportionate to the potential impact.

7 Centre Assessments

7.1 In the following Sections, we describe our findings for each of the Monmouthshire Centres. The primary information sources are the earlier assumptions and analysis from our 2020 Expenditure Forecasts, the MCC Retail Background Paper 2024, and our inspection of the centres (in Autumn 2023).

Expenditure Capacity

7.2 The 2020 expenditure forecasts adopted 2015 as a base year because of the availability of detailed information on shopping patterns within the County and its centres from the Beaufort Shopper Interviews Surveys 2015. The expenditure findings for each centre were shown in Appendices 1 and 2, Tables 9 of the 2020 Expenditure Report. Our current findings have particular regard to the changes that have occurred since the 2020 expenditure forecasts.

Population

7.3 Our assessments have had regard to the County population forecasts for the RLDP, which are lower than the forecasts assumed in our 2020 Expenditure Forecasts, as explained in Section 4 above. They also have regard to the Preferred Strategy new housing allocations proposed in Abergavenny, Caldicot, Monmouth, and Chepstow.

Market Shares / Retained Expenditure

7.4 The 2020 expenditure forecasts identified centre retained expenditure (market shares) for the individual goods categories within the convenience and comparison good sectors, based on Beaufort 2015 survey information. The application of actual expenditure figures to the goods categories market shares enabled the market shares for convenience and comparison goods as a whole to be calculated.

7.5 This report uses the Focus 2022 survey information for individual goods categories that is directly comparable with the 2015 Beaufort survey responses. However, in the absence of new monetary expenditure forecasts, it is not possible combine the goods category responses to provide centre figures for the convenience and comparison goods sectors as a whole. We rely on the individual goods category market share responses from the Beaufort and Focus Surveys.

7.6 For convenience goods we have examined the centre market shares for 'Main Food', and 'Top-up shopping visits - Questions 1a and 5 of the Focus interview surveys. For comparison goods we have examined the centre market shares for 'Clothing, Footwear, and Fashion Goods', and 'Household Goods, Glass and Tableware' visits - Questions 9a and 11e of the Focus interview surveys. Details of this market share analysis for the centres in 2015 and 2022 are provided in Tables 1-4 in Appendix 1.

7.7 In their Consumer Shopping Habits Survey Report, February 2022, Focus provides market share information in tabular form combining the 'main' destination and 'occasional' destinations visited. Our primary interest is to identify changes that have occurred over the 2015-2022 period. We are concerned that merging the responses of 'main' and 'occasional' destinations visited could mask changes that might have occurred between 2015 and 2022.

7.8 Where since 2015 there has been a change from ‘main’ to ‘occasional’ visits to a centre (or vice versa), because of amalgamation of the numbers the merged survey responses might not reveal this change. Our 2015 and 2022 centre market share figures shown in Appendix 1 Tables 1-4 of this report relate to the ‘main’ destinations visited only.

7.9 In summary, our examination of the performance of centres is based principally on changes of shopping patterns over the 2015-2022 period in the ‘Main Food’, and ‘Clothing, Footwear, and Fashion Goods’ categories, Appendix 1 Tables 1 and 3. These goods categories are considered to provide the best indicators of the changing role and strength of the County centres, as well as the role played by shopping destinations outside to which residents’ expenditure is attracted. We have included an analysis of ‘Top-up Food’ and ‘Household Goods, Glass, China, & Tableware’ shopping patterns, Appendix 1 Tables 2 and 4, as additional evidence.

7.10 It should be noted that the terms ‘retained expenditure’ and ‘market share’ used in the text are the same thing, and refer to the expenditure drawn to a centre expressed as a percentage of available residents’ expenditure in its defined catchment zone.

Qualitative Changes

7.11 The principal information sources on qualitative changes and issues within the centres are the MCC Retail Background Papers published annually, which provide considerable current and historic information on uses within the centres, vacancies, footfall, etc. We have sought not to reiterate the findings of the Background Papers, but to draw out the key messages. Appendix C of the 2024 Paper is particularly instructive as it compares in bar-graph form the key vitality and viability indicators for each of the County centres.

7.12 We have used 2010 as an evaluation date as some centre data was not collected in 2011. The latest footfall data is for 2021, as surveys were not undertaken in 2022. Had 2023 surveys been undertaken, we suspect they might have shown further post-pandemic recovery in some centres.

7.13 As is to be expected some of the changes over the 2010-2023 period reflect changes that are happening nationally, for example the growth of service uses within town centres compared with Class A1 retail uses.

7.14 Our observations on representation in the centres relate to the position in Autumn 2023, when inspections were made.

CSAs and Frontages

7.15 As is noted in Section 5 above, it is not part of our remit to advise on centre / frontage boundaries in the County Centres. Comments were made on all the centres in our 2020 CSA/Frontages Report, which also included some matters agreed with Council officers at that time. In this report we make some summary comments only in respect of the centres, based upon the points raised in our 2020 CSA/Frontages Report.

8 Abergavenny

8.1 Abergavenny is the largest centre in Monmouthshire, with a 2021 population of 13,691, or 15,697 if Llanfoist (2,006) is included. Its catchment extends over a large rural area from Raglan in the east to beyond Crickhowell in the west.

8.2 The town centre is based around a medieval street pattern and has a large concentration of retail, service, and leisure related uses.

2020 Expenditure Forecast Findings

Table 8.1 Abergavenny Surplus Expenditure (2020 Forecast)

	2015	2018	2023	2028	2033
Convenience	£14.2m	£2.18m	£0.54m	-£0.47m	£1.03m
Comparison	-£11.85m	-£10.79m	-£4.49m	£3.41m	£15.09m

Source: 2020 Expenditure Report, Appendices 1 and 2, Tables 9a

8.3 The former 2020 expenditure forecasts for Abergavenny, Table 8.1 above, showed modest levels of convenience surplus expenditure only over the period 2018-2033. The surplus expenditure identified in 2015, £14.2M, was absorbed substantially by the new Morrisons foodstore on the former Cattle Market site in the town centre. A determining factor affecting the forecasts was an assumed 10% increase (75%-85%) in convenience goods expenditure retention in Abergavenny attributable to the new supermarket floorspace in the town.

8.4 A comparison goods expenditure deficit was forecast up to 2023, after which surpluses arose in 2028 and 2033, rising to £15.1m by 2033. Comparison goods expenditure retention was assumed to remain broadly constant at around 30% over the forecast period, but with a slight fall-off in the latter part of the forecast period as internet spending increased. Only 16% of Clothes, Footwear and Fashion Goods expenditure was retained, although this was the highest of any Monmouthshire centre.

8.5 In recognition of the town's wide catchment area and attractiveness to visitors, we allowed for 17.5% of all comparison goods expenditure to be attracted from beyond the Study Area (2020 Expenditure Report, Appendix 2 Table 5).

2023 Forecast Updates

Population

8.6 The 2020 expenditure forecasts (2020 Expenditure Report, Appendices 1 and 2, Tables 1) assumed a Zone 1 (Abergavenny) population increase of 5,180 over the period 2018-2033, an increase of approximately 16%.

8.7 As noted in Section 4 above, the RLDP Preferred Option forecasts a lower Countywide population increase of +10.9% over the period 2018-2033. However, as one of the towns identified for significant new housing, Abergavenny's population increase will presumably be above the County average. Approximately 500 new homes are to be provided within the plan-period at Abergavenny East. Even allowing for this new housing allocation, the Zone 1 (Abergavenny) population increase previously assumed is unlikely to be achieved by 2033. However, there should be justification for some additional local convenience provision to serve the new housing area, see below.

Expenditure Retention

8.8 The changes in Abergavenny shopping patterns over the 2015-2022 period are shown in Table 8.2 below.

Table 8.2 Abergavenny Catchment Retained Expenditure %

	2015	2022	2015-22 diff
Main Food	68.1%	64.0%	-4,1%
Top-up Food	76.2%	57.6%	-18.6%
Clothing, Footwear and Fashion Goods	16.2%	32%	+15.8%
Household Goods, Glass, China, & Tableware	33.8%	52%	+18.2%

Source: Beaufort 2015 and Focus 2022 Surveys

Convenience Goods

8.9 The previously assumed increase in Abergavenny's retained convenience expenditure from Zone 1 residents has not occurred. Despite implementation of the new Morrisons foodstore, there has been a slight decline in retained Main Food expenditure retention and a bigger decline in Top-up Food expenditure retention since 2015, Table 8.2 above.

8.10 Appendix 1 Table 1 shows that in 2022 Morrisons attracted 26% of Zone 1 Main Food expenditure, and that this resulted in a decline of approximately 13% of expenditure at Waitrose Llanfoist, and just under 10% at the Aldi and Tesco Frogmore Rd stores. Compared with the situation in 2015 there has been a significant clawback of expenditure that was previously lost to Ebbw Vale / Brynmawr, approximately 7%, as well as from Cwmbran 3.7%. Conversely, residents' expenditure lost to Newport has increased by approximately 5% since 2015.

8.11 The change in Top-up Food shopping patterns (Appendix 1, Table 2) appears to be attributable to an increased use of other locations within and outside the County.

Comparison Goods

8.12 In contrast to convenience expenditure retention, there has been a marked uplift in Abergavenny's comparison expenditure retention for Clothing, Footwear and Fashion Goods and Household Goods, Glass, China, & Tableware. Expenditure retention for these goods categories has increased significantly by approximately 16% and 18% respectively over the 2015-2022 period, with the latter category expenditure retention rising to over 50%.

8.13 Appendix 1 Table 3 shows that there have been large decreases in Zone 1 residents' Clothing, Footwear and Fashion Goods expenditure lost to Cwmbran (-22.2%) and Cardiff (-12.8%) since 2015. Appendix 1 Table 4 shows that there are similar large decreases for 'Household Goods, Glass, China, & Tableware'.

Qualitative Changes

8.14 Abergavenny has the largest number of units of all the County centres, 285, including vacant premises in 2023. Table 8.3 below shows that the number of convenience outlets has grown since 2010; but here has been a small decline in comparison units since 2015, despite the increased retention of comparison goods expenditure. Service units have increased steadily since 2010.

8.15 Appendix C of the MCC Background Paper 2024 shows that Abergavenny had the highest retention rate for Clothing, Footwear and Fashion goods of all the County centres, and the largest number of national multiples in the County, which have decreased only slightly to 43 in 2023 (although Monmouth has a higher number as a percentage of total units).

8.16 The vacancy rate has been relatively modest since 2010, and has recovered well from a peak in 2016 (MCC Retail Background Paper 2024). Average pedestrian flows have increased since 2015. The indicators show positive signs of Abergavenny's health.

Table 8.3 Abergavenny Current and Historic Health Indicators

	2010	2015	2018	2023
Convenience Outlets	16	15	16	21
Comparison Outlets	119	133	123	116
Service Outlets	106	110	122	148
National Multiples	49	48	47	43
Vacancy Rate	6.9%	5.8%	4.7%	6.0%
Total Average Pedestrian Flows	694	465	596	637 (2021)

Source MCC Retail Background Papers

CSA and Frontages

8.17 Our advice on Abergavenny CSA and Frontages was set out in detail in our 2020 CSA/Frontages Report, paragraphs 4.1-4.17, which we do not reiterate here. We understand consideration is being given to contraction of the CSA in the northwest. We noted that the Abergavenny PSFs are lengthy, particularly in the southern part of the centre, and suggested that consideration could be given to shortening the PSF and relying on CSA controls where the PSF has been shortened.

8.18 We noted that under the criteria requirements of Policy RET2, 100% of units in PSF2 (Cibi Walk) are required to be Class A1 retail. Having regard to the important role that that some non-Class A1 uses can play in generating footfall, we felt that this was illustrative of the need to reconsider the policy criteria.

Findings

8.19 The core shopping area of Abergavenny includes Frogmore Street, High Street, and Cibi Walk. Within this area the principal multiples are located, together with a number of quality independent stores/boutiques selling fashion clothing, etc. The stores present in this area include – Tesco, WH Smith, Boots, Mountain Warehouse, Fat Face, B&M, Waterstones, Bon Marche, Clarks, Nicholls, Poundland, Edinburgh Woollen Mill, Iceland, and Ryman. The recent closure of Wilko has resulted in largest unit in Cibi Walk becoming vacant.

8.20 Abergavenny Market is also present in this area, which contains an indoor hall and landscaped outdoor area. Different markets operate most weekdays and are clearly an important draw for residents and visitors. The offer of the markets includes locally sourced food products and a wide range of value clothing, footwear, and bric-a-brac.

8.21 The principal foodstores are outside the core shopping area – Morrisons at the former Cattle Market site, and Aldi (extended in 2022) on the edge of the centre in Monmouth Road.

8.22 Cross Street is the principal shopping street outside the core area and currently defined as a PSF. It contains a number of secondary independent shops, and food and drink uses, including ethnic restaurants. There are relatively few vacant premises.

8.23 The benefits brought about by environmental and public realm improvements in the centre are noticeable. These include the Brewery Yard project providing an attractive setting for the markets, and street pedestrianisation and enhancements in Frogmore Street.

8.24 The 2022 Focus Survey findings indicate that retained convenience expenditure attracted to Abergavenny may not achieve the levels assumed in our 2020 Expenditure forecasts. On the other hand, the Surveys show positive change in the attractiveness of Abergavenny as a comparison goods centre, with residents' retained expenditure on Clothing, Footwear and Fashion Goods almost doubling over the period 2015-2022. Similarly, the centre footfall figures suggest that the centre may be recovering well from the pandemic downturn.

8.25 It will be important to protect the town centre as the principal destination for main food shopping trips. Any proposals for new retail floorspace outside the town centre / CSA in excess of 500 sq.m (suggested in Section 6), should be required to undertake a retail impact assessment that is proportionate to the scale of development proposed.

8.26 The proposed new Abergavenny East housing allocation is likely to accommodate some 500 new homes. It lies some 1.5 kms from the town centre core area. Because of the distance from the town centre, it will be desirable to encourage locally any small-scale convenience / service facilities for the new residents that may be achievable, in the form and scale of a neighbourhood centre. The viability of such facilities might get additional support if they were located where they could benefit from any passing trade from the train station.

8.27 In summary, the increase in Abergavenny's market share of residents' comparison shopping is encouraging. Alongside the growth of service uses, particularly food / drink, this could provide an opportunity for enhanced use some of the peripheral commercial units in the centre. This is turn will increase the attractiveness of the town centre to visitors, as well as residents. It will be important to focus additional expenditure potential to the town centre/CSA so as to support and enhance its vitality and viability. It may, nevertheless, be necessary to accept and plan for some contraction of the frontages on the edge of the centre.

9 Caldicot

9.1 Caldicot had a population of 9,813 in 2021. Its catchment differs significantly from the large rural catchments that serve the principal market towns. The catchment extends from Rogiet in the west to Portskewett in the east, and extends north as far as Llanvair Discoed.

9.2 Caldicot has a different character from the historic towns of Monmouthshire. The town centre is in the form of an open pedestrian mall with adjacent surface level car parking. Although convenient and accessible for residents, it now appears ‘tired’ and lacks the appeal of the other centres.

2020 Expenditure Forecast Findings

Table 9.1 Caldicot Surplus Expenditure (2020 Forecast)

	2015	2018	2023	2028	2033
Convenience	-£3.41m	-£2.92m	-£2.21m	-£1.57m	-£1.20m
Comparison	£0.89m	£1.71m	£2.76m	£4.13m	£6.53m

Source: 2020 Expenditure Report, Appendices 1 and 2, Tables 9e

9.3 The former 2020 expenditure forecasts for Caldicot, Table 9.1 above, showed a deficit of convenience expenditure throughout the period 2015-2033, but some comparison expenditure growth.

9.4 The introduction of ASDA (2,320 sq.m sales area) on the southern edge of the centre in October 2014 represented a major change for the centre, and increased its market share for convenience goods as a whole significantly to 68%. On the other hand, despite the introduction of ASDA’s non-food offer, the comparison goods market share declined.

9.5 We noted also that Caldicot benefited from a significant number of Zone 6 Magor residents (23%) undertaking their Main Food shopping trip in the town.

9.6 Our expenditure forecasts allowed the town’s market share of convenience expenditure to remain constant throughout the plan period, 68%. We also assumed that trade inflow levels would grow pro-rata to the growth of available expenditure. Despite these ‘generous’ assumptions, no additional convenience expenditure capacity was forecast over the plan-period.

9.7 Apart from the ASDA store, Caldicot had a limited offer for comparison shopping. The predominant destination for Caldicot residents’ comparison shopping in 2015 was Newport (Clothing, Footwear and Fashion Goods 67.5%, Appendix 1 Table 3). Despite assuming a continuing decline in the centre’s market share for comparison goods, caused by increasing use of the internet and expenditure outflow, an expenditure surplus of approximately £6.5m arose by 2033.

2023 Forecast Updates

Population

9.8 The 2020 expenditure forecasts (2020 Expenditure Report, Appendices 1 and 2, Tables 1) assumed a Zone 5 (Caldicot) population increase of 3,101 over the period 2018-2033, an increase of approximately 22%. As noted in Section 4 above, the RLDP Preferred Option forecasts a lower Countywide population increase of +10.9% over the period 2018-2033.

9.9 Caldicot is identified as the centre to which the largest amount of housing growth will be steered. Approximately 725 new homes are to be provided within the plan-period as part of a mixed-use development at Caldicot East. Even allowing for this new housing allocation, the Zone 5 (Caldicot) population increase previously assumed may not be exceeded by 2033. However, there should be justification for some additional local convenience provision to serve the new housing area, see below.

Expenditure Retention

9.10 The changes in Caldicot shopping patterns over the 2015-2022 period are shown in Table 9.2 below.

Table 9.2 Caldicot Catchment Retained Expenditure %

Goods Category	2015	2022	2015-22 diff
Main Food	56.4%	66.0%	+9.6%
Top-up Food	98.3%	61%	-37.3%
Clothing, Footwear and Fashion Goods	2.6%	1%	-1.6%
Household Goods, Glass, China, & Tableware	9.6%	13.0%	+3.4%

Source: Beaufort 2015 and Focus 2022 Surveys

Convenience Goods

9.11 A major change between 2015 and 2022 was the opening of ALDI store in August 2021 in Newport Road, following closure of the Waitrose store. This may explain in part Caldicot's increased retention of Main Food shopping expenditure by almost 10%. This is an improvement on our 2020 forecast assumption that the retention share would remain constant. The 2022 Top-up Food shopping figures should be treated with caution as, for example, some 11% of respondents said they did Top-up Food shopping in Waitrose, although it had closed in 2021.

Comparison Goods

9.12 As previously forecast, the comparison goods expenditure retention levels have remained poor reflecting the very limited offer of the town centre shops. However, Appendix 1 Table 3 shows that there has been a large decline in the draw of Newport. Clothing Footwear and Fashion Goods expenditure lost to Newport declined from 67.5% in 2015 to 23% in 2022. There was a corresponding large increase in use of the internet from 4.3% in 2015 to 47% in 2022.

Qualitative Changes

9.13 Table 9.3 below shows that the number of convenience outlets in Caldicot centre has remained broadly constant since 2010. There was a decline in comparison units in 2015 and 2018, but a small increase in 2023. The number of service units has increased since 2010 – Appendix C of the MCC Retail Background Paper 2023 shows that Caldicot had the highest percentage of service units of all the County centres. The number of national multiples has remained broadly constant. The vacancy rate has also been broadly constant at under 10%, since 2015.

9.14 Pedestrian flows have declined since 2010, suggesting that only a limited number of ASDA shoppers are visiting Newport Road shops.

Table 9.3 Caldicot Current and Historic Health Indicators

	2010	2015	2018	2023
Convenience Outlets	6	7	7	7
Comparison Outlets	25	17	15	18
Service Outlets	33	35	37	42
National Multiples	7	9	9	7
Vacancy Rate	4.5%	7.6%	10.6%	9.5%
Total Average Pedestrian Flows	367	239	281	210 (2021)

Source MCC Retail Background Papers

CSA and Frontages

9.15 Our advice on Caldicot CSA and Frontages was set out in detail in our 2020 CSA/Frontages Review 2020, paragraphs 4.18-4.26, which we do not reiterate here.

9.16 The dominant retail facility within Caldicot is the ASDA foodstore, which lies outside the currently defined CSA boundary, although we understand that it is the intention of the Council to extend the CSA to include the store and its car park.

9.17 Currently the PSF SPG 2016 designates the pedestrianised shopping mall Newport Road (7-43 & 14 Wesley Buildings) as a PSF. The Mall frontages are not performing well, and we questioned with officers whether there continues to be justification for a defined PSF, and whether the appropriate range of retail and commercial uses might be best controlled through CSA policies.

Findings

9.18 The 2022 Focus Survey findings indicate that the large ASDA store and ALDI in Newport Road have enabled Caldicot to increase its retention of residents' convenience expenditure slightly. This is positive for the centre. However, units in the Newport Road Mall continue to provide a limited offer. Reflecting this, the retention of residents' comparison goods expenditure continues to be very low.

9.19 The Caldicot Town Centre Regeneration Study proposes strategies and funding for various initiatives in the town centre, of which improvements at The Cross have already been implemented. Such initiatives are important to increase the attractiveness of the town centre for residents, particularly any initiatives that can improve the link from ASDA to Newport Road Mall and thereby encourage more ASDA shoppers to visit the core area of the town centre.

9.20 We note that the RLDP Preferred Strategy refers to the Caldicot East allocation being *"Mixed Use: Residential, Employment, Retail, Leisure"*. We accept that the number of houses proposed and the distance of the allocation from the town centre justifies the provision of some neighbourhood convenience/service facilities. However, because of the town centre's vulnerability, it will be important that the scale and type of facilities at Caldicot East do not adversely impact the town centre. With this in mind we have suggested in Section 6 a floorspace threshold of 250 sq.m, above which a retail impact assessment will be required.

10 Chepstow

10.1 Chepstow had a population of 11,934 in 2021. It serves a largely rural catchment, which includes areas outside the County to the east. The town is a tourist attraction including the castle and historic walls.

2020 Expenditure Forecast Findings

Table 10.1 Chepstow Surplus Expenditure (2020 Forecast)

	2015	2018	2023	2028	2033
Convenience	£3.37m	£3.78m	£3.46m	£2.76m	£1.78m
Comparison	-£13.83m	-£13.10m	-£10.76m	-£7.72m	-£2.64m

Source: 2020 Expenditure Report, Appendices 1 and 2, Tables 9d

10.2 The former 2020 expenditure forecasts for Chepstow, Table 10.1 above, showed a modest surplus of convenience expenditure, but a consistent deficit of comparison expenditure throughout the forecast period.

10.3 We allowed for the town market share of convenience expenditure to be maintained throughout the plan period, apart from a small increase in 2018 arising from the introduction of M&S Simply Food.

10.4 The town's market share of comparison goods expenditure was low in 2015, approximately 22%. With closure of the Herbert Lewis department store and increase in internet spending, we allowed for the comparison goods market share to decline further over the forecast-period to some 18%.

10.5 In recognition of the town's attractiveness to visitors, we allowed for 12.5% of all comparison goods expenditure to be attracted from beyond the Study Area (2020 Expenditure Report, Appendix 2 Table 5).

2023 Forecast Updates

Population

10.6 The 2020 expenditure forecasts (2020 Expenditure Report, Appendices 1 and 2, Tables 1) assumed a Zone 4 (Chepstow) population increase of 2,255 over the period 2018-2033, an increase of approximately 9.3%. As noted in Section 4 above, the RLDP Preferred Option forecasts a slightly higher Countywide population increase of +10.9% over the period 2018-2033.

10.7 Chepstow is identified as one of the centres to which growth will be steered. Approximately 145 new homes are to be provided with the plan-period at Mounton Road. Even allowing for this new housing allocation, the Zone 4 (Chepstow) population increase previously assumed is unlikely to be achieved by 2033.

Expenditure Retention

10.8 The changes in Chepstow shopping patterns over the 2015-2022 period are shown in Table 10.2 below.

Table 10.2 Chepstow Catchment Retained Expenditure %

	2015	2022	2015-22 diff
Main Food	74.2%	45.0%	-29.2%
Top-up Food	81.9%	43%	-38.9%
Clothing, Footwear and Fashion Goods	3.6%	9%	+5.4%
Household Goods, Glass, China, & Tableware	19.8%	23.0%	+3.2%

Source: Beaufort 2015 and Focus 2022 Surveys

Convenience Goods

10.9 Table 10.2 shows a large decline in Chepstow's market share for both Main Food and Top-up shopping. Appendix 1 Table 1 shows that the decline includes the largest foodstore Tesco Station Road - its Main Food market share declining from 45% in in 2015 to 32% in in 2022. The existing Lidl store market share declined from 15% in 2015 to 10% in 2022. The new Lidl store in Bulwark has yet to be implemented, although at the time of writing the existing Social Club had been demolished.

Comparison Goods

10.10 Contrary to our previous forecast of decline, there appears to have been some modest increase in the town's market share of comparison goods, with 'Clothing, Footwear and Fashion Goods' increasing from approximately 4% in 2015 to 9% in 2022, Table 10.2 above. However, there continues to be large expenditure outflows to Newport and Bristol, with Bristol emerging more strongly in 2022, possibly relating to the abolition of Severn Bridge tolls in 2018, Appendix 1, Table 3.

Qualitative Changes

Table 10.3 Chepstow Current and Historic Health Indicators

	2010	2015	2018	2023
Convenience Outlets	6	5	8	9
Comparison Outlets	64	64	66	54
Service Outlets	79	84	76	86
National Multiples	21	21	21	19
Vacancy Rate	11.3%	10%	11.8%	13.6%
Total Average Pedestrian Flows	323	270	183	246 (2021)

Source MCC Retail Background Papers

10.11 Table 10.3 above shows that the number of convenience outlets in Chepstow has increased since 2010. During the same period the number of comparison units has declined, whilst the number of service units has increased. Compared with other Monmouthshire centres the vacancy rate has been relatively high since 2010.

10.12 Pedestrian flows have declined since 2010, although there has been some upturn since 2018.

CSA and Frontages

10.13 Our advice on Chepstow CSA and Frontages was set out in detail in our 2020 CSA/Frontages report, paragraphs 4.27-4.33, which we do not reiterate here.

10.14 We have previously considered with officers whether Welsh Street Car Park to the north west of the CSA, which acts as a parking area for CSA shoppers and visitors, should appropriately be included within the CSA. We also provided detailed advice on possible changes to frontage designations and boundaries.

Findings

Town Centre

10.15 The performance of Chepstow is mixed. There has been a significant decline in the town's retention of convenience shopping trips, with the town's main supermarkets Tesco Station Road, Lidl Bulwark, and Tesco Thornhill Road adversely affected. The main competition appears to be from the ASDA and ALDI stores in Caldicot, and the ALDI store in Abergavenny, Appendix 1, Tables 1 and 2.

10.16 Conversely, the increase (although limited) in the town centre's market share of comparison goods expenditure is encouraging, particularly in the face of the loss of the town centre's department store, Herbert Lewis in 2018, which remains vacant. The town's largest comparison unit is B&M, which opened in 2019 in Thornwell. The store is akin to an out-of-centre department store, stocking a wide range of grocery products, household goods, electrical goods, furniture and bedding, etc, as well as a garden centre. The wide range of merchandise in the store overlaps significantly with that can be found in town centres.

10.17 Vacant premises are evident throughout the town centre in the main frontages as well as side alleys, such as Rifleman's Way. This does detract from the appearance and vitality of some frontages.

10.18 The town centre has three distinct sectors. The central sector, High Street, lies between Beaufort Square and the town's southern historic gateway. Historically a number of national multiples were located on the southern side of High Street. Boots, WH Smith, Superdrug, Greggs and Peacocks remain, but this frontage has deteriorated as former occupiers have been lost (including the large units formerly occupied by the Factory Outlet Centre and Herbert Lewis). New occupiers have included service trades and food and drink uses, such as coffee shops. The High Street sector benefits from proximity to the town centre's main car park at Welsh Street.

10.19 The northern sector is focussed on St Mary Street (and alley ways leading from it), which has emerged as a popular location for small independent specialist shops, as well as independent food and drink uses. This area is attractive to visitors to the historic town centre.

10.20 The sector to the south is visually separated from the rest of the town centre by the historic gate. It benefits from the presence of the bus station and some multiples, Marks & Spencer and Poundland. In October 2023 Poundland reoccupied the former Wilko premises in Welsh Street. There is a lengthy frontage of secondary shops, ethnic restaurants and service uses along Moor Street to the south, where footfall drops as distance from the core area increases.

10.21 Despite environmental improvements that have taken place in the past, parts of the town centre have a somewhat tired appearance brought about by vacancies and the presence of secondary uses. Compared with Abergavenny and Monmouth, there is a poorer representation of multiple and independent traders offering fashion clothing and footwear, jewellery, gifts, etc.

10.22 As an historic walled town with castle, Chepstow town centre has potential to attract visitors' as well as residents' expenditure. A significant opportunity must be for further independent shops and services, particularly food and drink, that are attractive to visitors. Such uses can differentiate the offer of Chepstow from the offer of multiple shops in the large competing centres to which Chepstow residents are attracted.

10.23 Environmental improvements that increase the physical attractiveness of the town centre should assist significantly in increasing its appeal to residents and visitors. In this respect, the initiatives put forward for the town centre as part of the MCC 'Improving Chepstow' regeneration proposals are to be welcomed.

10.24 Planning policy should seek to steer new retail investment to the CSA, where it is needed to maintain and enhance the vitality and viability of the centre. In Section 6, we have suggested a maximum floorspace threshold of 500 sq.m above which retail proposals will need to be supported by a retail impact assessment. The purpose of this is to give the Council a clear policy tool with which to protect the role and function of Chepstow (as well as other County centres).

Bulwark

10.25 Bulwark is a large local centre. In addition to the Lidl store on the edge of the centre, it contains a Spar supermarket, Premier convenience store, pharmacy, and post office. The centre has a large number of relatively small units mostly occupied by secondary shops and services.

10.26 The new Lidl Store for which planning permission was granted in 2022 on the former Social Club site has yet to be implemented.

11 Monmouth

11.1 Monmouth had a population of 10,317 in 2021. Its catchment covers a largely rural hinterland extending towards Raglan in the west and Coleford in the east.

11.2 The town has a distinctive historic character, which is reflected in the many historic buildings and the historic street pattern of the centre. The town is also set within the Wye Valley, which is an important tourist area (as is the adjacent Forest of Dean).

2020 Expenditure Forecast Findings

Table 11.1 Monmouth Surplus Expenditure (2020 Forecast)

	2015	2018	2023	2028	2033
Convenience	£4.84m	£7.14m	£6.60m	£5.72m	£4.60m
Comparison	£3.38m	£3.34m	£9.68m	£14.80m	£22.46m

Source: 2020 Expenditure Report, Appendices 1 and 2, Tables 9b

11.3 The former 2020 expenditure forecasts for Monmouth, Table 11.1 above, showed a surplus of convenience expenditure since 2015, and a growing surplus of comparison expenditure throughout the forecast period reaching £22.5m by 2033.

11.4 In 2015 the town had a convenience goods market share of approximately 70% and comparison goods market share of approximately 27%. We allowed for a slight decline of these shares over the plan period.

11.5 We observed that from visual inspection the Waitrose and M&S stores did not appear to be trading strongly.

11.6 In recognition of the town's attractiveness to visitors, we allowed for 17.5% of all comparison goods expenditure to be attracted from beyond the Study Area (2020 Expenditure Report, Appendix 2 Table 5).

2023 Forecast Updates

Population

11.7 The 2020 expenditure forecasts (2020 Expenditure Report, Appendices 1 and 2, Tables 1) assumed a Zone 2 (Monmouth) population increase of 1,974 over the period 2018-2033, an increase of approximately 7.2%. As noted in Section 4 above, the RLDP Preferred Option forecasts a higher Countywide population increase of +10.9% over the period 2018-2033.

11.8 Monmouth is one of the centres to which growth is proposed to be steered under the RLDP Preferred Strategy – 270 new homes at Leasbrook are expected in the northern part of the town. A further allocation of 60 homes at Rockfield Road is proposed in addition to the adjacent extant site of 70 homes, and a further 160 homes are being rolled forward from the existing LDP. We believe that 2020 expenditure forecasts are unlikely to be affected materially by new population forecasts and these housing allocations.

Expenditure Retention

11.9 The changes in Monmouth shopping patterns over the 2015-2022 period are shown in Table 11.2 below.

Table 11.2 Monmouth Catchment Retained Expenditure %

	2015	2022	2015-22 diff
Main Food	61.8%	33%	-28.8%
Top-up Food	89.8%	34%	-55.8%
Clothing, Footwear and Fashion Goods	10.2%	13%	+2.8%
Household Goods, Glass, China, & Tableware	15.8%	23.0%	+7.2%

Source: Beaufort 2015 and Focus 2022 Surveys

Convenience Goods

11.10 Table 11.2 shows a very significant fall in Monmouth's retention of both Main and Top-up Food spending. Appendix 1 Tables 1 and 2 show that the decline has occurred in both the CSA Waitrose and M&S stores, as well as Lidl Wyesham. Table 1 also shows a large increase of Main Food expenditure lost to Hereford from approximately 3% in 2015 to 26% in 2022.

11.11 Neither the town centre foodstores nor Lidl Wyesham were busy when inspected in Autumn 2023. Increasing traffic congestion at the A40 Wye bridge junction could be a disincentive for some town residents to make the journey to the Lidl on the opposite side of the river.

Comparison Goods

11.12 In contrast to convenience spending there has been a slight increase in the town centre's market share of comparison spending – the Clothing, Footwear and Fashion Goods' sector is up from 10% in 2015 to 13% in 2022. Appendix 1, Table 3 shows that the principal destination for these goods is Hereford (32%). Conversely both Newport and Cwmbran, which were important destinations in 2015, have ceased to be attractors for Monmouth (Zone 2) residents.

Qualitative Changes

11.13 Table 11.3 below shows that the number of convenience outlets in Monmouth remained broadly constant from 2010 to 2023. The number of comparison units has remained broadly constant from 2010 to 2018, but has declined since then. Service units have increased since 2010.

11.14 The MCC Retail Background Paper 2024 indicates that Monmouth had the highest percentage of national multiples of the County towns. Table 11.3 below shows that by 2023 this had risen to 39 units.

11.15 Monmouth's vacancy rate rose sharply in 2023 to over 18%. On the other hand, the pedestrian footfall in 2021 (the latest figures) was well up on both the 2015 and 2018 figures. It should be noted, however, that Monmouth's average pedestrian flows are only half those of Abergavenny.

Table 11.3 Monmouth Current and Historic Health Indicators

	2010	2015	2018	2023
Convenience Outlets	14	16	15	16
Comparison Outlets	88	83	80	64
Service Outlets	59	72	74	73
National Multiples	36	34	32	39
Vacancy Rate	8%	8.1%	10.1%	18.2%
Total Average Pedestrian Flows	317	275	238	335 (2021)

Source MCC Retail Background Papers

CSA and Frontages

11.16 Our advice on Monmouth CSA and frontages was set out in detail in our CSA/Frontages Report 2020, paragraphs 4.40-4.50, which we do not reiterate here. Following earlier discussion with officers, we agreed some changes to the Monmouth CSA boundary, which we presume are being addressed.

11.17 We referred to the centre having a dumbbell structure with some weakening of the centrally located frontages, with the greatest areas of shopper activity being in the northern and southern parts of the centre respectively. The southern part of Monnow Street contains Waitrose and M&S. The northern part of the CSA, focussed on Church Street. has traditionally been home for smaller unit specialist independent traders and services, which appear well used.

11.18 We stated that if the length of PSF becomes unsustainable some planned contraction of the centrally located frontages could be considered. Our most recent inspection in Autumn 2023 has indicated some strengthening of the central frontages and reoccupation of units, e.g., Coco Blush Boutique, which is encouraging.

Findings

11.19 The Focus survey of shopping patterns and MCC survey of health indicators show volatility over time in Monmouth. In part this may be reflect changes of occupation of units that are not necessarily damaging to the centre (natural churn), such as opening of food and drink outlets in premises formerly occupied by national comparison traders. The MCC Retail Background Paper 2024 refers to these changes in their description of retailer representation, noting in particular the decrease in comparison units and increase in service units since 2021 (paragraph 7.3.2).

11.20 The principal multiple retailers have traditionally been located in Monnow Street. In addition to Waitrose and M&S, these include WH Smith, Boots, and fashion clothing outlets such as Fat Face and White Stuff. Other well-stablished retailers include Millets, Card Factory and Salt & Pepper (gifts, toys etc.).

11.21 The MCC Retail Background Paper 2024 (paragraph 7.1.1) notes the significance of the markets in Monmouth. “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.”

11.22 Although the unit vacancy rate is quite high, vacant units in the main frontages are not particularly evident, as is the case in Chepstow, see Section 10.

11.23 The Focus Surveys show a clear decline in 2022 of Main Food and Top-up shopping in Monmouth CSA and at Lidl Wyesham, and a clear increase in the loss of convenience trade to Hereford in particular –26% of Main Food expenditure, Appendix 1 Table 1.

11.24 In so far as comparison shopping and the presence of services is concerned, the message is more mixed. Monmouth continues to be an attractive centre for residents and visitors, but the loss of expenditure to Hereford is again significant – 32% of Zone 2 residents' Clothing, Footwear and Fashion Goods expenditure was lost to Hereford in 2022.

11.25 Alongside other historic market towns, Monmouth was adversely affected by the loss of visitors during the pandemic. There is opportunity to continue winning back custom that was lost at this time, see Section 4, which should help offset the loss of Monmouth residents' expenditure to competing large centres.

11.26 Planning policies should be strongly geared towards maintaining and enhancing the quality of the environment in the historic centre of the town. The reoccupation of under-utilised properties in the historic centre by uses that are attractive to residents and visitors should be encouraged. The town centre shopping frontages are lengthy. Where commercial demand is weakest there may be a case for considering a wider range of acceptable uses.

11.27 Further shopping facilities, other than those to serve neighbourhood needs only, should normally be located in the town centre in the interests of protecting its shopping role. In Section 6, we have suggested a maximum floorspace threshold of 500 sq.m above which retail proposals will need to be supported by a retail impact assessment. The purpose of this is to give the Council a clear policy tool with which to protect the role and function of Monmouth (as well as other County centres).

12 Usk

12.1 Usk had a population of 2,629 in 2021. It is a small historic town with a catchment that is more compact than the large rural catchments that serve the three principal County towns.

2020 Expenditure Forecast Findings

Table 12.1 Usk Surplus Expenditure (2020 Forecast)

	2015	2018	2023	2028	2033
Convenience	£3.64m	£3.89m	£4.00m	£4.08m	£4.13m
Comparison	-£0.75m	-£0.57m	-£0.32m	£0.03m	£0.44m

Source: 2020 Expenditure Report, Appendices 1 and 2, Tables 9c

12.2 For the purposes of our former 2020,expenditure forecasts we allowed for Usk's percentage market shares of convenience and comparison expenditure to remain constant over the forecast period at approximately 24% and 5% respectively. This generated a modest convenience goods expenditure surplus and very limited comparison goods expenditure surplus by 2033, as shown in Table 12.1 above.

2023 Forecast Updates

Population

12.3 The 2020 Expenditure Forecasts (Appendix 1 and 2, Tables 1) assumed a Zone 3 (Usk) population increase of 705 over the period 2018-2033, an increase of approximately 8%. As noted in Section 4 above, the RLDP Preferred Option forecasts a higher Countywide population increase of +10.9% over the period 2018-2033.

12.4 Usk is not one of the centres to which substantial growth is proposed to be steered under the RLDP. However, a site of 40 homes is proposed as an allocation within the Town. We do not believe that our earlier expenditure forecasts should be materially affected by the new County population forecasts.

Expenditure Retention

12.5 The changes in Usk shopping patterns over the 2015-2022 period are shown in Table 12.2 below.

Table 12.2 Usk Catchment Retained Expenditure %

	2015	2022	2015-22 diff
Main Food	8.7%	8%	-0.7%
Top-up Food	89.1%	30%	-59.1%
Clothing, Footwear and Fashion Goods	3.8%	0%	-3.8%
Household Goods, Glass, China, & Tableware	0%	9.0%	+9.0%

Source: Beaufort 2015 and Focus 2022 Surveys

12.6 Because Usk's retention of residents' expenditure is very low, particularly for comparison goods, these figures should be treated with caution.

12.7 It can be seen that in 2022 Usk retained only 8% of residents' main food expenditure, and 30% of their Top-up Food expenditure. Appendix 1 Table 1 shows that the principal destinations for Usk residents' (Zone 3) Main Food expenditure in 2022 were Abergavenny, Caldicot, and Newport. The former draw to Monmouth has fallen away sharply from 22% in 2015 to only 7% in 2022.

12.8 The retention of Top-up Food shopping expenditure has also fallen sharply with a significant increase to other destinations within and outside the County.

12.9 Because of the limited offer, Usk's market share for comparison goods expenditure remains low, with nil responses for Clothing, Footwear and Fashion Goods in 2022 and 9% only for Household Goods, Appendix 1 Tables 3 and 4.

Qualitative Changes

12.10 Table 12.3 below shows that there have been no major changes in the number of convenience units, but some decline in the number of comparison units in the period 2010 to 2023. However, the number of service units has risen from 23 in 2010 to 35 in 2023.

12.11 The vacancy rate was 10% in 2023 and below 10% in 2021 and 2022 (MCC Retail Background Paper 2024). This was significantly below the levels in previous years, as shown in Table 12.3 below.

12.12 Average pedestrian flows of 96 in 2021 were above those recorded in 2010, 2015, and 2018.

Table 12.3 Usk Current and Historic Health Indicators

	2010	2015	2018	2023
Convenience Outlets	5	5	3	4
Comparison Outlets	21	20	19	15
Service Outlets	23	31	26	35
National Multiples	n/a	n/a	n/a	2
Vacancy Rate	16.9%	11.1%	15.9%	10%
Total Average Pedestrian Flows	61	88	89	96 (2021)

Source MCC Retail Background Papers

CSA and Frontages

12.13 Our advice on Usk CSA and Frontages was set out in detail in our CSA/Frontages Report 2020, paragraphs 4.51-4.53, which we do not reiterate here.

12.14 Other than to question the omission of the Maryport Street North Car Park (if the CSA were considered to be with synonymous with a town centre boundary for Usk), we have no comments in addition to those made in our 2020 Review.

12.15 We have also previously stated that, because of its limited size and offer there would be no justification for having frontage policy designations in the centre.

Findings

12.16 Because it is a small centre, there is a high level of convenience and comparison expenditure leakage from Usk. The principal foodstore is a Co-op, off Bridge Street. However, there are a number of specialist independent traders in the convenience, comparison, and service sectors. These include bakery/deli, boutique clothing, gifts/antiques, and craft trades, as well as Museum & Visitor Centre with café in Maryport Street car park.

12.17 Consideration could be given to any proposals for further convenience floorspace in the town that would clawback some of the expenditure leakage (and thereby increase the town market share), were they to come forward. However, it would be essential that new proposals, if outside the CSA, did not adversely affect existing facilities and erode the role of the town centre as a shopping destination. In Section 6, we have suggested a maximum floorspace threshold of 250 sq.m, above which retail proposals will need to be supported by a retail impact assessment. The purpose of this is to give the Council a clear policy tool with which to protect the role and function of Usk (as well as other County centres).

12.18 In 2020 Arup published an Improvement Master Plan for Usk that had been commissioned by MCC and Usk Town Council. The recommendations included traffic management in both Bridge Street and Twyn Square.

12.19 The conflict between pedestrians and motor traffic, including heavy vehicles, is acute in Bridge Street and seriously damaging to the shopping environment. It is noticeable how the Co-op has redesigned and extended its store to be accessed from the car park to the rear with direct entry from Bridge Street closed. Improvement of conditions in Bridge Street is essential to maintain Usk as an attractive destination for local shops and services. Bridge Street is 'shared space' between motor traffic and pedestrian shoppers. The current layout and surfacing of the street do not reflect this.

12.20 Arup also saw the principal commercial potential of Usk being for specialist shops and services, with which we agree.

13 Magor and Raglan

13.1 Magor and Raglan are unlike the other Monmouth centres. They are much smaller and akin to 'village' centres, although Magor serves substantial areas of relatively modern housing.

Magor

13.2 Magor with Undy had a population of 5,944 in 2021. The settlement contains a substantial new housing area that is served by the small historic centre.

2020 Expenditure Forecast Findings

Table 13.1 Magor Surplus Expenditure (2020 Forecast)

	2015	2018	2023	2028	2033
Convenience	£2.73m	£2.90m	£0.04m	-£0.06m	-£0.20m
Comparison	-£0.41m	-£0.42m	-£0.24m	£0.18m	£0.10m

Source: 2020 Expenditure Report, Appendices 1 and 2, Tables 9f

13.3 Appendix I of the 2020 Expenditure Report shows that in 2015 Magor retained 19% only of residents' expenditure for convenience goods. This was predominantly for Top-up Food shopping. Even having allowed for some uplift of retained convenience expenditure to 27% by 2033, there was no material expenditure surplus.

13.4 The Beaufort 2015 Survey did not record any comparison-goods shopping trips to Magor. Our identified expenditure surplus was based on an assumption that Magor would attract a notional 1% of available catchment expenditure after 2023.

13.5 The overwhelming majority of Magor residents' convenience and comparison expenditure was attracted to centres elsewhere – Newport Centre and Retail Park being the most popular destinations.

2023 Forecast Updates

Population

13.6 The 2020 Expenditure Forecasts (Appendix 1 and 2, Tables 1) assumed a Zone 6 (Magor) population increase of 847 over the period 2018-2033, an increase of approximately 8.7%. As noted in Section 4 above, the RLDP Preferred Option forecasts a higher Countywide population increase of +10.9% over the period 2018-2033.

13.7 Magor is not one of the centres to which significant new housing development is proposed by the RLDP Preferred Strategy. In any event, because the dominant issue in Magor is expenditure leakage rather than the quantum of residents' expenditure available, our earlier expenditure forecasts will not be materially affected by the new population forecasts.

Expenditure Retention

13.8 Table 13.2 below suggests that there has been a large decline in Top-up Food shopping attracted to Magor in the 2015 to 2022 period. In addition to Newport, Caldicot has become an attractive destination with a new ALDI store in addition to ASDA. The scale of the Top-up Food expenditure decline indicated in Table 13.2 (approximately 43%) should be treated with caution. The Focus Survey respondents referred to a wide range of destinations and many indicated they did not do Top-up Food shopping. We have not seen any on-the-ground evidence suggesting such a large-scale decline has occurred.

Table 13.2 Magor Catchment Retained Expenditure %

	2015	2022	2015-22 diff
Main Food	2.8%	2%	-0.8%
Top-up Food	56.1%	13%	-43.1%
Clothing, Footwear and Fashion Goods	0%	0%	0%
Household Goods, Glass, China, & Tableware	0%	0%	0%

Source: Beaufort 2015 and Focus 2022 Surveys

Diversity of Uses

13.9 The commercial uses present in Magor centre are shown in Table 13.2 below.

Table 13.2 Magor Retail and Service Outlets

	2023
Convenience Outlets	2
Comparison Outlets	7
Service Outlets	14
National Multiples	1
Vacancy Rate	4.3%

Source: MCC

13.10 The main store is the Co-op foodstore at The Cross. In addition, there are a number of independent shops and services, including post office, chemist, delicatessen, café / restaurants, and public houses. Vacant premises are not evident in the centre.

CSA

13.11 Magor CSA is compact largely representing the historic centre which benefits from conservation area status. Because of its small size and limited offer, we have expressed reservations in Section 5 above about whether Magor (and Raglan, see below) justify having a defined CSA.

13.12 Planning permission was granted in March 2022 (originally proposed in 2005) for a medium sized foodstore at Magor Motors, a short distance from the northern boundary of the CSA. We have previously raised with officers whether there would be justification for including the site and intervening land within the CSA (assuming the CSA is retained).

13.13 On balance, we recommended the CSA boundary should remain as is, and the Magor Motors site should therefore remain as ‘edge-of-centre’. Having regard to the time that has elapsed since the original proposals, it would in any event be premature to make any changes until the new foodstore is actually implemented.

Findings

13.14 As a village centre Magor (and Raglan) differ from the five larger County centres. Magor centre is compact and attractive, but with a more limited range of shops than the larger centres. The predominant shopping function of the centre is for top-up convenience purchases, but it does also contain independent specialist outlets, including food and drink, that contribute to the attractiveness of the centre.

13.15 If a new larger foodstore is implemented at the Magor Motors site, this would clearly divert a large amount of trade from the existing Co-op store. However, the specialist offer of the other shops and services in the centre should enable them to maintain their business custom.

13.16 The principal opportunity for Magor is the attraction of specialist businesses taking advantage of the appeal of its historic centre. However, because of its compact nature, there is little opportunity to undertake further development within the centre.

13.17 Planning policy for Magor should ensure that any new convenience or comparison floorspace proposals that come forward should not detract from the vitality and viability of the historic centre, which is a major asset. In Section 6, we have suggested a floorspace threshold of 150 sq.m, above which an impact assessment should be required proportionate to the scale and type of proposal.

Raglan

13.18 Raglan had a population of 2,432 in 2021. The RDLP proposes a limited amount of new development in the village, approximately 50 homes. The village centre spreads along High Street and is centrally located within the settlement.

13.19 The Focus 2022 and earlier Beaufort Surveys did not include a separate catchment zone for Raglan, and our 2020 Retail Expenditure Report forecasts therefore did not include Raglan.

Diversity of Uses

13.20 Table 13.3 shows the range of uses within Raglan centre.

Table 13.3 Raglan Retail and Service Outlets

	2023
Convenience Outlets	2
Comparison Outlets	3
Service Outlets	10
National Multiples	3
Vacancy Rate	13.3%

Source: MCC

13.21 As a village centre, Raglan is reasonably well provided. The principal trader is a Nisa foodstore. There is also a chemist and post office, plus food and drink facilities. The two public houses (plus a recently closed public house) stem from the former position of Raglan on the A40 trunk road.

CSA

13.22 Because of its small size, limited offer, and spread-out nature, we have expressed reservations in Section 5 above about whether Raglan justifies having a defined CSA. However, in the 2020 CSA/Frontages Report, following discussions with officers, we did recommend some changes to the CSA boundary (assuming a CSA is retained).

Findings

13.23 Raglan currently performs effectively as a village centre. In the event that proposals come forward for significant new retail development outside the village centre, it may be appropriate for planning policy to provide some protection for the convenience facilities in the village centre, see Section 6.

Monmouthshire Town Centre / Retail Study 2024

Appendix 1
Destinations of Monmouthshire Residents' Expenditure 2015 and 2022

Table 1 Main Food Shop
Table 2 Top-up Food Shopping
Table 3 Clothing, Footwear and Fashion Goods
Tab;e 4 Household Goods, Glass, and Tableware

The 2015 response data is from the JWP Monmouthshire Retail Expenditure Forecasts Update 2020. The responses were in turn were derived from the Beaufort Research Shopper Interview Surveys 2015

The 2022 responses are from the data tables of the Focus Consumer Shopping Habits Survey 2022

The total responses do not always sum to 100%. This may be due to rounding or coding inconsistencies

Table 1 Destinations of Monmouthshire Residents' Expenditure 2015 and 2022 - Main Food Shop

		Zone 1 Abergavenny			Zone 2 Monmouth			Zone 3 Usk			Zone 4 Chepstow			Zone 5 Caldicot			Zone 6 Magor		
		2015	2022	2015-22	2015	2022	2015-22	2015	2022	2015-22	2015	2022	2015-22	2015	2022	2015-22	2015	2022	2015-22
		%	%	% diff	%	%	% diff	%	%	% diff	%	%	% diff	%	%	% diff	%	%	% diff
Zone 1	Morrisons, Lion St, Abergavenny	0.0%	26.0%	26.0%	0.0%	0%	0.0%	0.0%	16.0%	16.0%	0.0%	2.0%	2.0%	0.0%	2.0%	2.0%	0.0%	0.0%	0.0%
Abergavenny	Tesco, Frogmore St, Abergavenny	11.7%	2.0%	-9.7%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	Aldi, Monmouth Rd, Abergavenny	29.9%	20.0%	-9.9%	0.0%	2%	2.0%	15.9%	3.0%	-12.9%	0.9%	5.0%	4.1%	0.0%	2.0%	2.0%	0.0%	2%	2.0%
	Iceland, Cibi Walk, Abergavenny	2.7%	5.0%	2.3%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	Waitrose, Merthyr Rd, Llanfoist	23.9%	11.0%	-12.9%	0.4%	1%	0.6%	5.8%	3.0%	-2.8%	0.0%	1.0%	1.0%	0.0%	2.0%	2.0%	1.4%	1%	-0.4%
	Other Stores Zone 1, Abergavenny	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	Total Zone 1 Abergavenny	**68.1%**	**64.0%**	**-4.1%**	**0.4%**	**3.0%**	**2.6%**	**21.7%**	**22.0%**	**0.3%**	**0.9%**	**8.0%**	**7.1%**	**0.0%**	**6.0%**	**6.0%**	**1.4%**	**3.0%**	**1.6%**
Zone 2	Waitrose, Monnow St, Monmouth	0.4%	3.0%	2.6%	26.6%	16.0%	-10.6%	11.6%	2.0%	-9.6%	4.0%	3.0%	-1.0%	0.0%	2.0%	2.0%	2.8%	2%	-0.8%
Monmouth	Co-Op, Oldway Centre, Monmouth	0.4%	0.0%	-0.4%	10.3%	0.0%	-10.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	Iceland, Agincourt Sq, Monmouth	0.0%	0.0%	0.0%	2.6%	3.0%	0.4%	0.0%	0.0%	0.0%	0.0%	1.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	M & S, Monnow St, Monmouth	0.0%	0.0%	0.0%	1.3%	0.0%	-1.3%	0.0%	0.0%	0.0%	0.4%	0.0%	-0.4%	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	Lidl, Wyesham, Monmouth	0.4%	2.0%	1.6%	21.0%	9.0%	-12.0%	10.1%	4.0%	-6.1%	0.4%	2.0%	1.6%	0.0%	2.0%	2.0%	1.4%	0%	-1.4%
	Co-Op, Rockfield Rd, Monmouth	0.0%	0.0%	0.0%	0.0%	5.0%	5.0%	0.0%	1.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	Spar, King's Fee, Monmouth	0.4%	0.0%	-0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	Other Stores Zone 2 Monmouth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	Total Zone 2 Monmouth	**1.5%**	**5.0%**	**3.5%**	**61.8%**	**33.0%**	**-28.8%**	**21.7%**	**7.0%**	**-14.7%**	**4.8%**	**6.0%**	**1.2%**	**0.0%**	**4.0%**	**4.0%**	**4.2%**	**2.0%**	**-2.2%**
Zone 3	Co-Op, Bridge St, Usk	0.0%	0.0%	0.0%	**0.0%**	0%	0.0%	5.8%	6.0%	0.2%	0.4%	0.0%	-0.4%	0.0%	0.0%	0.0%	0.0%	0%	0.0%
Usk	One Stop, Usk	0.0%	0.0%	0.0%	0.0%	0%	0.0%	1.4%	0.0%	-1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	Nisa, High St, Raglan	0.0%	0.0%	0.0%	0.0%	0%	0.0%	1.4%	2.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	Other Stores Zone 3 Usk	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	Total Zone 3 Usk	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**8.7%**	**8.0%**	**-0.7%**	**0.4%**	**0.0%**	**-0.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Zone 4	Tesco, Station Rd, Chepstow	0.0%	3.0%	3.0%	0.4%	0%	-0.4%	2.9%	4.0%	1.1%	45.1%	32.0%	-13.1%	5.1%	13.0%	7.9%	4.2%	15%	10.8%
Chepstow	Budgens, Thomas St, Chepstow	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	-0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	M&S, Thomas St, Chepstow	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	Lidl, Bulwark Rd, Chepstow	0.0%	0.0%	0.0%	0.4%	0%	-0.4%	0.0%	0.0%	0.0%	15.0%	10.0%	-5.0%	15.4%	1.0%	-14.4%	5.6%	9%	3.4%
	Spar, Bulwark Rd, Chepstow	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	Tesco, Thornwell, Chepstow	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	4.0%	4.0%	13.7%	2.0%	-11.7%	0.0%	4.0%	4.0%	2.8%	0%	-2.8%
	Other Stores Zone 4 Chepstow	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	-2.6%	0.0%	0%	0.0%
	Total Zone 4 Chepstow	**0.0%**	**3.0%**	**3.0%**	**0.8%**	**0.0%**	**-0.8%**	**2.9%**	**8.0%**	**5.1%**	**74.2%**	**45.0%**	**-29.2%**	**23.1%**	**18.0%**	**-5.1%**	**12.6%**	**24.0%**	**11.4%**
Zone 5	Waitrose, Newport Rd, Caldicot	0.0%	0.0%	0.0%	1.3%	0%	-1.3%	0.0%	0.0%	0.0%	1.3%	0.0%	-1.3%	**9.4%**	**0.0%**	**-9.4%**	5.6%	0%	-5.6%
Caldicot	Aldi, Newport Rd, Caldicot	0.0%	0.0%	0.0%	0.0%	1%	1.0%	0.0%	6.0%	6.0%	0.0%	5.0%	5.0%	**0.0%**	**18.0%**	**18.0%**	0.0%	21%	21.0%
	Asda, Woodstock Way	0.0%	1.0%	1.0%	1.3%	1%	-0.3%	0.0%	4.0%	4.0%	3.1%	8.0%	4.9%	**45.3%**	**48.0%**	**2.7%**	8.5%	27%	18.5%
	Co-op, West End, Caldicot	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**1.7%**	**0.0%**	**-1.7%**	8.5%	0%	-8.5%
	Spar, Main Rd, Portskewett	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**	**0.0%**	**0.0%**	0.0%	0%	0.0%
	Other Stores Zone 5 Caldicot	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**	**0.0%**	**0.0%**	0.0%	0%	0.0%
	Total Zone 5 Caldicot	**0.0%**	**1.0%**	**1.0%**	**2.6%**	**2.0%**	**-0.6%**	**0.0%**	**10.0%**	**10.0%**	**4.4%**	**13.0%**	**8.6%**	**56.4%**	**66.0%**	**9.6%**	**22.6%**	**48.0%**	**25.4%**
Zone 6	Co-Op, The Cross, Magor	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	2%	-0.8%
Magor	Other Stores Zone 6	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	Total Zone 6 Magor	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.8%**	**2.0%**	**-0.8%**
TOTAL 6 TOWNS (plus Raglan and {Portskewett)		69.7%	73.0%	3.3%	65.6%	38.0%	-27.6%	55.1%	55.0%	-0.1%	84.7%	72.0%	-12.7%	79.5%	94.0%	14.5%	43.6%	79.0%	35.4%
Other Locations c	Newport	1.1%	6.0%	4.9%	3.0%	1%	-2.0%	18.8%	4.0%	-14.8%	1.8%	9.0%	7.2%	9.4%	2.0%	-7.4%	33.8%	13%	-20.8%
	Ross on Wye	0.0%	0.0%	0.0%	8.0%	2%	-6.0%	0.0%	2.0%	2.0%	0.0%	4.0%	4.0%	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	Cwmbran	5.7%	2.0%	-3.7%	1.1%	0%	-1.1%	7.2%	7.0%	-0.2%	0.0%	3.0%	3.0%	0.0%	0.0%	0.0%	0.0%	3%	3.0%
	Ebbw Vale / Brynwawr	14.0%	7.0%	-7.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	Hereford	1.5%	0.0%	-1.5%	2.7%	26%	23.3%	0.0%	6.0%	6.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1%	1.0%
	Lydney	0.0%	0.0%	0.0%	2.7%	1%	-1.7%	0.0%	0.0%	0.0%	0.0%	1.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	Asda Bristol	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	6.6%	0.0%	-6.6%	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	OTHER	3.0%	6.0%	3.0%	8.3%	23%	14.7%	13.0%	15.0%	2.0%	2.7%	4.0%	1.3%	10.3%	1.0%	-9.3%	14.1%	0%	-14.1%
TOTAL OTHER LOCATIONS		25.3%	21.0%	-4.3%	25.7%	53.0%	27.3%	39.1%	34.0%	-5.1%	11.1%	21.0%	9.9%	19.7%	3.0%	-16.7%	47.9%	17.0%	-30.9%
INTERNET		4.90%	6%	1.1%	5.6%	9%	3.4%	5.8%	9.0%	3.2%	4.0%	6.0%	2.0%	0.9%	3.0%	2.1%	8.5%	5%	-3.5%
TOTAL		*100%*	*100%*		*97%*	*100%*		*100%*	*98%*		*100%*	*99%*		*100%*	*100%*		*100%*	*101%*	

Notes

(1) Percentage market shares based on results of Beaufort Research Shopper Interview Survey November 2015, and Focus Interview Surveys 2022

Table 2 Destinations of Monmouthshire Residents' Expenditure 2015 and 2022 - Top-up Food Shopping

		Zone 1 Abergavenny			Zone 2 Monmouth			Zone 3 Usk			Zone 4 Chepstow			Zone 5 Caldicot			Zone 6 Magor		
		2015 %	2022 %	2015-22 % difference	2015 %	2022 %	2015-22 % difference	2015 %	2022 %	2015-22 % difference	2015 %	2022 %	2015-22 % difference	2015 %	2022 %	2015-22 % difference	2015 %	2022 %	2015-22 % difference
Zone 1	Morrisons, Lion St, Abergavenny	0.0%	12.1%	12.1%	0.0%	0%	0.0%	0.0%	7.0%	7.0%	0.0%	0.0%	0.0%	0.0%	2.0%	2.0%	0.0%	0.0%	0.0%
Abergavenny	Tesco, Frogmore Street, Abergavenny	16.3%	8.6%	-7.7%	0.0%	0%	0.0%	0.0%	1.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Aldi, Monmouth Road, Abergavenny	21.5%	16.9%	-4.6%	0.0%	2%	2.0%	0.0%	5.0%	5.0%	0.0%	5.0%	5.0%	0.0%	1.0%	1.0%	1.5%	4.0%	2.5%
	Iceland, Cibi Walk, Abergavenny	3.0%	0.9%	-2.1%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Waitrose, Merthyr Road, Llanfoist	21.5%	7.8%	-13.7%	0.0%	1%	1.0%	3.1%	3.0%	-0.1%	0.0%	2.0%	2.0%	0.0%	2.0%	2.0%	0.0%	0.0%	0.0%
	Other Stores in Zone 1, Abergavenny	14.0%	11.3%	-2.7%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total Zone 1 Abergavenny	**76.2%**	**57.6%**	**-18.6%**	**0.0%**	**3.0%**	**3.0%**	**3.1%**	**16.0%**	**12.9%**	**0.0%**	**7.0%**	**7.0%**	**0.0%**	**5.0%**	**5.0%**	**1.5%**	**4.0%**	**2.5%**
Zone 2	Waitrose, Monnow Street, Monmouth	0.9%	0.0%	-0.9%	26.3%	7.0%	-19.3%	3.1%	1.0%	-2.1%	3.9%	4.0%	0.1%	0.0%	2.0%	2.0%	0.0%	0.0%	0.0%
Monmouth	Co-Op, Oldway Centre, Monmouth	0.9%	0.0%	-0.9%	11.4%	0.0%	-11.4%	0.0%	2.0%	2.0%	0.5%	0.0%	-0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Iceland, Agincourt Square, Monmouth	0.0%	1.0%	1.0%	4.4%	2.0%	-2.4%	0.0%	1.0%	1.0%	0.0%	1.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	M & S, Monnow Street, Monmouth	0.0%	0.0%	0.0%	4.8%	3.0%	-1.8%	0.0%	1.0%	1.0%	0.0%	2.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Lidl, Wyesham, Monmouth	0.4%	0.0%	-0.4%	13.6%	4.0%	-9.6%	0.0%	4.0%	4.0%	1.5%	2.0%	0.5%	0.0%	1.0%	1.0%	1.5%	0.0%	-1.5%
	Co-Op, Rockfield Road, Monmouth	0.0%	0.0%	0.0%	0.0%	13.0%	13.0%	0.0%	2.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	3.0%
	Spar, King's Fee, Monmouth	0.0%	0.0%	0.0%	3.9%	3.0%	-0.9%	0.0%	1.0%	1.0%	0.5%	1.0%	0.5%	0.0%	2.0%	2.0%	0.0%	0.0%	0.0%
	Other Stores Zone 2 Monmouth	0.0%	3.0%	3.0%	25.4%	2.0%	-23.4%	0.0%	2.0%	2.0%	0.0%	1.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total Zone 2 Monmouth	**2.2%**	**4.0%**	**1.9%**	**89.8%**	**34.0%**	**-55.8%**	**3.1%**	**14.0%**	**10.9%**	**6.4%**	**11.0%**	**4.6%**	**0.0%**	**5.0%**	**5.0%**	**1.5%**	**3.0%**	**1.5%**
Zone 3	Co-Op, Bridge Street, Usk	0.4%	1.0%	0.6%	0.0%	1%	1.0%	42.2%	28.0%	-14.2%	0.5%	3.0%	2.5%	0.0%	0.0%	0.0%	0.0%	5.0%	5.0%
Usk	One Stop, Usk	0.0%	0.0%	0.0%	0.0%	0%	0.0%	14.1%	0.0%	-14.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Nisa, High Street, Raglan	0.4%	0.0%	-0.4%	0.0%	0%	0.0%	25.0%	2.0%	-23.0%	1.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other Stores in Zone 3 Usk	0.0%	0.0%	0.0%	0.0%	0%	0.0%	7.8%	0.0%	-7.8%	0.5%	0.0%	-0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total Zone 3 Usk	**0.9%**	**1.0%**	**0.1%**	**0.0%**	**1.0%**	**1.0%**	**89.1%**	**30.0%**	**-59.1%**	**2.0%**	**4.0%**	**2.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**5.0%**	**5.0%**
Zone 4	Tesco, Station Road, Chepstow	0.0%	0.0%	0.0%	0.0%	0%	0.0%	1.6%	2.0%	0.4%	11.2%	10.0%	-1.2%	0.0%	12.0%	12.0%	3.0%	3.0%	0.0%
Chepstow	Budgens, Thomas St, Chepstow	0.0%	0.0%	0.0%	2.2%	0%	-2.2%	4.7%	0.0%	-4.7%	17.1%	5.0%	-12.1%	0.0%	1.0%	1.0%	0.0%	0.0%	0.0%
	M&S, Thomas Street, Chepstow	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	2.0%	2.0%	0.0%	6.0%	6.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Lidl, Bulwark Road, Chepstow	0.0%	0.0%	0.0%	1.8%	0%	-1.8%	0.0%	0.0%	0.0%	12.7%	0.0%	-12.7%	3.5%	1.0%	-2.5%	1.5%	0.0%	-1.5%
	Spar, Bulwark Road, Chepstow	0.0%	0.0%	0.0%	0.0%	0%	0.0%	1.6%	1.0%	-0.6%	2.4%	13.0%	10.6%	0.9%	6.0%	5.1%	0.0%	0.0%	0.0%
	Tesco Express, Thornwell, Chepstow	0.0%	0.0%	0.0%	0.0%	0%	0.0%	1.6%	4.0%	2.4%	14.1%	7.0%	-7.1%	0.9%	6.0%	5.1%	0.0%	6.0%	6.0%
	Other Stores in Zone 4 Chepstow	0.0%	0.0%	0.0%	0.0%	1%	1.0%	0.0%	0.0%	0.0%	24.4%	2.0%	-22.4%	0.0%	3.0%	3.0%	0.0%	2.0%	2.0%
	Total Zone 4 Chepstow	**0.0%**	**0.0%**	**0.0%**	**4.0%**	**1.0%**	**-3.0%**	**9.5%**	**9.0%**	**-0.5%**	**81.9%**	**43.0%**	**-38.9%**	**5.3%**	**29.0%**	**23.7%**	**4.5%**	**11.0%**	**6.5%**
Zone 5	Waitrose, Newport Road, Caldicot	0.0%	0.0%	0.0%	1.8%	1%	-0.8%	0.0%	1.0%	1.0%	2.0%	4.0%	2.0%	16.8%	11.0%	-5.8%	10.6%	14.0%	3.4%
Caldicot	Aldi, Newport Road, Caldicot	0.0%	1.0%	1.0%	0.0%	1%	1.0%	0.0%	3.0%	3.0%	0.0%	5.0%	5.0%	0.0%	24.0%	24.0%	0.0%	12.0%	12.0%
	Asda, Woodstock Way	0.0%	1.0%	1.0%	1.3%	1%	-0.3%	0.0%	6.0%	6.0%	2.0%	3.0%	1.0%	43.4%	18.0%	-25.4%	7.6%	15.0%	7.4%
	Co-op, West End, Caldicot	0.0%	0.0%	0.0%	1.3%	0%	-1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.4%	6.0%	-14.4%	9.1%	3.0%	-6.1%
	Spar, Main Road, Portskewett	1.7%	0.0%	-1.7%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	2.0%	-1.5%	0.0%	0.0%	0.0%
	Other Stores in Zone 5 Caldicot	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	14.2%	0.0%	-14.2%	0.0%	2.0%	2.0%
	Total Zone 5 Caldicot	**1.7%**	**2.0%**	**0.3%**	**4.4%**	**3.0%**	**-1.4%**	**0.0%**	**10.0%**	**10.0%**	**4.0%**	**12.0%**	**8.0%**	**98.3%**	**61.0%**	**-37.3%**	**27.3%**	**46.0%**	**18.7%**
Zone 6	Co-Op, The Cross, Magor	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	1.0%	-2.5%	48.5%	13.0%	-35.5%
Magor	Other Stores in Zone 6	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.6%	0.0%	-7.6%
	Total Zone 6 Magor	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**3.5%**	**1.0%**	**-2.5%**	**56.1%**	**13.0%**	**-43.1%**
TOTAL 6 TOWNS (plus Raglan and Portskewett)		81.0%	64.6%	-16.4%	98.2%	42.0%	-56.2%	104.8%	79.0%	-25.8%	94.3%	77.0%	-17.3%	107.1%	93.0%	-6.1%	90.9%	82.0%	-8.9%
Other Locations		20.0%	33.1%	13.1%	0.4%	56.0%	55.6%	*-4.7%*	21.0%	25.7%	2.9%	23.0%	20.1%	-7.1%	7.0%	14.1%	7.6%	16.0%	8.4%
INTERNET		0.4%	2%	1.6%	1.3%	2%	0.7%	0.0%	2.0%	2.0%	2.9%	3.0%	0.1%	0.0%	1.0%	1.0%	1.5%	2.0%	0.5%
TOTAL		*101.4%*	*99.7%*		*99.9%*	*100%*		*100%*	*102%*		*100%*	*103%*		*100%*	*101%*		*100%*	*100.0%*	

Notes

(1) Percentage market shares based on results of Beaufort Research Shopper Interview Survey November 2015, and Focus Interview Surveys 2022

Table 3 Destinations of Monmouthshire Residents' Expenditure 2015 and 2022 - Clothing, Footwear, and Fashion Goods

		Zone 1 Abergavenny			Zone 2 Monmouth			Zone 3 Usk			Zone 4 Chepstow			Zone 5 Caldicot			Zone 6 Magor		
		2015	2022	2015-22	2015	2022	2015-22	2015	2022	2015-22	2015	2022	2015-22	2015	2022	2015-22	2015	2022	2015-22
		%	%	% diff	%	%	% diff	%	%	% diff	%	%	% diff	%	%	% diff	%	%	% diff
Zone 1	Abergavenny Town Centre	16.2%	32.0%	15.8%	0.9%	2%	1.1%	0.0%	19.0%	19.0%	0.4%	1.0%	0.6%	0.0%	1.0%	1.0%	0.0%	4.0%	4.0%
	Other Stores in Zone 1	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total Zone 1 Abergavenny	**16.2%**	**32.0%**	**15.8%**	**0.9%**	**2.0%**	**1.1%**	**0.0%**	**19.0%**	**19.0%**	**0.4%**	**1.0%**	**0.6%**	**0.0%**	**1.0%**	**1.0%**	**0.0%**	**4.0%**	**4.0%**
Zone 2	Monmouth Town Centre	0.4%	3.0%	2.6%	10.2%	13.0%	2.8%	0.0%	1.0%	1.0%	0.9%	3.0%	2.1%	0.9%	1.0%	0.1%	0.0%	0.0%	0.0%
	Other Stores Zone 2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total Zone 2 Monmouth	**0.4%**	**3.0%**	**2.6%**	**10.2%**	**13.0%**	**2.8%**	**0.0%**	**1.0%**	**1.0%**	**0.9%**	**3.0%**	**2.1%**	**0.9%**	**1.0%**	**0.1%**	**0.0%**	**0.0%**	**0.0%**
Zone 3	Usk Centre	0.0%	0.0%	0.0%	**0.0%**	0%	0.0%	3.0%	0.0%	-3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other Stores in Zone 3 (Raglan)	0.8%	0.0%	-0.8%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total Zone 3 Usk	**0.8%**	**0.0%**	**-0.8%**	**0.0%**	**0.0%**	**0.0%**	**3.0%**	**0.0%**	**-3.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Zone 4	Chepstow Town Centre	0.0%	3.0%	3.0%	0.9%	0%	-0.9%	0.0%	7.0%	7.0%	3.6%	9.0%	5.4%	0.9%	2.0%	1.1%	0.0%	2.0%	2.0%
	Other Stores in Zone 4	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total Zone 4 Chepstow	**0.0%**	**3.0%**	**3.0%**	**0.9%**	**0.0%**	**-0.9%**	**0.0%**	**7.0%**	**7.0%**	**3.6%**	**9.0%**	**5.4%**	**0.9%**	**2.0%**	**1.1%**	**0.0%**	**2.0%**	**2.0%**
Zone 5	Caldicot Centre	0.0%	0.0%	0.0%	0.0%	1%	1.0%	0.0%	1.0%	1.0%	0.0%	3.0%	3.0%	2.6%	1.0%	-1.6%	0.0%	4.0%	4.0%
	Other Stores in Zone 5	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total Zone 5 Caldicot	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.0%**	**1.0%**	**0.0%**	**1.0%**	**1.0%**	**0.0%**	**3.0%**	**3.0%**	**2.6%**	**1.0%**	**-1.6%**	**0.0%**	**4.0%**	**4.0%**
Zone 6	Magor Centre	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Magor	Other Stores in Zone 6	0.0%	0.0%	0.0%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total Zone 6 Magor	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
TOTAL 6 TOWNS (plus Raglan)		17.4%	38.0%	20.6%	12.0%	16.0%	4.0%	3.0%	28.0%	25.0%	4.9%	16.0%	11.1%	4.4%	5.0%	0.6%	0.0%	10.0%	10.0%
Other Locations	Newport	4.0%	9.0%	5.0%	18.2%	3%	-15.2%	19.4%	13.0%	-6.4%	20.2%	12.0%	**-8.2%**	67.5%	23.0%	-44.5%	44.6%	16%	-28.6%
outside County	Cwmbran	31.2%	9.0%	-22.2%	11.1%	0%	-11.1%	22.4%	6.0%	-16.4%	1.8%	4.0%	**2.2%**	4.3%	0.0%	-4.3%	5.4%	0%	-5.4%
	Cardiff	15.8%	3.0%	-12.8%	9.8%	2%	-7.8%	29.9%	5.0%	-24.9%	7.6%	7.0%	**-0.6%**	10.3%	9.0%	-1.3%	25.7%	6%	-19.7%
	Hereford	3.2%	4.0%	0.8%	17.8%	32%	14.2%	0.0%	0.0%	0.0%	0.0%	2.0%	**2.0%**	0.0%	0.0%	0.0%	1.4%	0%	-1.4%
	Gloucester	0.0%	0.0%	0.0%	4.0%	0%	-4.0%	0.0%	0.0%	0.0%	7.2%	0.0%	**-7.2%**	0.0%	0.0%	0.0%	0.0%	1%	1.0%
	Ebbw Vale / Brynmawr/ Methry Tydfil	5.5%	0.0%	-5.5%	0.0%	0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	Ross on Wye	0.0%	0.0%	0.0%	2.2%	5%	2.8%	0.0%	3.0%	3.0%	0.0%	1.0%	**1.0%**	0.0%	2.0%	2.0%	0.0%	0%	0.0%
	Bristol	0.0%	5.0%	5.0%	2.2%	14%	11.8%	0.0%	9.0%	9.0%	7.2%	24.0%	**16.8%**	1.7%	14.0%	12.3%	1.4%	27%	25.6%
	OTHER	10.3%	2.0%	-8.3%	13.8%	7%	-6.8%	4.5%	15.0%	10.5%	33.2%	9.0%	**-24.2%**	7.7%	0.0%	-7.7%	12.2%	7%	-5.2%
TOTAL OTHER LOCATIONS		70.0%	32.0%	-38.0%	79.1%	63.0%	-16.1%	76.2%	51.0%	-25.2%	77.2%	59.0%	-18.2%	91.5%	48.0%	-43.5%	90.7%	57.0%	-33.7%
INTERNET / Mail Order		12.6%	29.0%	16.4%	9.9%	21%	11.1%	20.9%	21.0%	0.1%	17.9%	25.0%	7.1%	4.3%	47.0%	42.7%	9.5%	33%	23.5%
TOTAL		*100%*	*99%*		*101%*	*100%*		*100%*	*100%*		*100%*	*100%*		*100%*	*100%*		*100%*	*100%*	

Notes

(1) Percentage market shares based on results of Beaufort Research Shopper Interview Survey November 2015, and Focus Interview Surveys 2022

Table 4 Destinations of Monmouthshire Residents' Expenditure 2015 and 2022 - Household Goods, Glass, and Tableware

		Zone 1 Abergavenny			Zone 2 Monmouth			Zone 3 Usk			Zone 4 Chepstow			Zone 5 Caldicot			Zone 6 Magor		
		2015	2022	2015-22	2015	2022	2015-22	2015	2022	2015-22	2015	2022	2015-22	2015	2022	2015-22	2015	2022	2015-22
		%	%	% diff	%	%	% diff	%	%	% diff	%	%	% diff	%	%	% diff	%	%	% diff
Zone 1	Abergavenny Town Centre	33.8%	52.0%	18.2%	0.5%	1.0%	0.5%	7.1%	10.0%	2.9%	1.0%	1.0%	0.0%	0.0%	2.0%	2.0%	0.0%	0.0%	0.0%
	Other Stores in Zone 1	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total Zone 1 Abergavenny	**33.8%**	**52.0%**	**18.2%**	**0.5%**	**1.0%**	**0.5%**	**7.1%**	**10.0%**	**2.9%**	**1.0%**	**1.0%**	**0.0%**	**0.0%**	**2.0%**	**2.0%**	**0.0%**	**0.0%**	**0.0%**
Zone 2	Monmouth Town Centre	0.0%	5.0%	5.0%	15.8%	23.0%	7.2%	0.0%	1.0%	1.0%	1.0%	2.0%	**1.0%**	0.0%	1.0%	1.0%	0.0%	4.0%	4.0%
	Other Stores Zone 2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total Zone 2 Monmouth	**0.0%**	**5.0%**	**5.0%**	**15.8%**	**23.0%**	**7.2%**	**0.0%**	**1.0%**	**1.0%**	**1.0%**	**2.0%**	**1.0%**	**0.0%**	**1.0%**	**1.0%**	**0.0%**	**4.0%**	**4.0%**
Zone 3	Usk Centre	0.0%	1.0%	1.0%	**0.0%**	0.0%	0.0%	0.0%	9.0%	9.0%	0.0%	0.0%	**0.0%**	0.0%	0.0%	0.0%	1.8%	0.0%	-1.8%
	Other Stores in Zone 3 (Raglan)	0.9%	0.0%	-0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total Zone 3 Usk	**0.9%**	**1.0%**	**0.1%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**9.0%**	**9.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.8%**	**0.0%**	**-1.8%**
Zone 4	Chepstow Town Centre	0.0%	1.0%	1.0%	0.5%	1.0%	0.5%	0.0%	8.0%	8.0%	19.8%	23.0%	3.2%	4.3%	16.0%	11.7%	1.8%	12.0%	10.2%
	Other Stores in Zone 4	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total Zone 4 Chepstow	**0.0%**	**1.0%**	**1.0%**	**0.5%**	**1.0%**	**0.5%**	**0.0%**	**8.0%**	**8.0%**	**19.8%**	**23.0%**	**3.2%**	**4.3%**	**16.0%**	**11.7%**	**1.8%**	**12.0%**	**10.2%**
Zone 5	Caldicot Centre	0.0%	0.0%	0.0%	0.5%	1.0%	0.5%	0.0%	6.0%	6.0%	0.5%	5.0%	**4.5%**	9.6%	13.0%	3.4%	3.6%	12.0%	8.4%
	Other Stores in Zone 5	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total Zone 5 Caldicot	**0.0%**	**0.0%**	**0.0%**	**0.5%**	**1.0%**	**0.5%**	**0.0%**	**6.0%**	**6.0%**	**0.5%**	**5.0%**	**4.5%**	**9.6%**	**13.0%**	**3.4%**	**3.6%**	**12.0%**	**8.4%**
Zone 6	Magor Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Magor	Other Stores in Zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total Zone 6 Magor	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
TOTAL 6 TOWNS (plus Raglan)		34.7%	59.0%	24.3%	17.3%	26.0%	8.7%	7.1%	34.0%	26.9%	22.3%	31.0%	8.7%	13.9%	32.0%	18.1%	7.2%	28.0%	20.8%
Other Locations (	Newport	1.9%	6.0%	4.1%	11.6%	1.0%	-10.6%	12.5%	9.0%	-3.5%	7.1%	12.0%	**4.9%**	35.1%	10.0%	-25.1%	38.2%	12%	-26.2%
	Cwmbran	14.6%	1.0%	-13.6%	3.7%	0.0%	-3.7%	12.5%	10.0%	-2.5%	0.5%	3.0%	**2.5%**	3.2%	0.0%	-3.2%	1.8%	4%	2.2%
	Cardiff	17.4%	0.0%	-17.4%	16.8%	1.0%	-15.8%	32.1%	1.0%	-31.1%	5.1%	1.0%	**-4.1%**	5.3%	4.0%	-1.3%	12.7%	0%	-12.7%
	Hereford	2.3%	3.0%	0.7%	6.8%	17.0%	10.2%	0.0%	3.0%	3.0%	0.0%	2.0%	**2.0%**	0.0%	5.0%	5.0%	1.8%	0%	-1.8%
	Gloucester	0.0%	0.0%	0.0%	1.1%	1.0%	-0.1%	0.0%	0.0%	0.0%	7.6%	0.0%	**-7.6%**	0.0%	0.0%	0.0%	0.0%	1%	1.0%
	Ebbw Vale / Brynmawr/ Methry Tydfil	8.5%	0.0%	-8.5%	1.1%	0.0%	-1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**	0.0%	0.0%	0.0%	0.0%	0%	0.0%
	Ross on Wye	0.0%	0.0%	0.0%	4.2%	3.0%	-1.2%	0.0%	4.0%	4.0%	0.0%	1.0%	**1.0%**	0.0%	1.0%	1.0%	0.0%	0%	0.0%
	Bristol	0.9%	0.0%	-0.9%	15.3%	11.0%	-4.3%	14.3%	13.0%	-1.3%	34.5%	23.0%	**-11.5%**	10.6%	9.0%	-1.6%	9.1%	29%	19.9%
	OTHER	8.5%	6.0%	-2.5%	11.6%	4.0%	-7.6%	10.7%	0.0%	-10.7%	6.1%	5.0%	**-1.1%**	10.6%	0.0%	-10.6%	9.1%	1%	-8.1%
TOTAL OTHER LOCATIONS		54.1%	16.0%	-38.1%	72.2%	38.0%	-34.2%	82.1%	40.0%	-42.1%	60.9%	47.0%	-13.9%	64.8%	29.0%	-35.8%	72.7%	47.0%	-25.7%
INTERNET / Mail Order		11.3%	25.0%	13.7%	10.5%	36.0%	25.5%	10.7%	26.0%	15.3%	16.8%	22.0%	5.2%	21.3%	40.0%	18.7%	20.0%	26%	6.0%
TOTAL		*100%*	*100%*		*100.0%*	*100.0%*		*100%*	*100%*		*100%*	*100%*		*100%*	*101%*		*100%*	*101%*	

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