BACKGROUND PAPER 8
PAPUR CEFNDIR 8

RETAILING

DEPOSIT LOCAL DEVELOPMENT PLAN
UP TO 2021

October 2008

MANWERTHU

CYNLLUN ADNEUO DATBLYGU LLEOL
HYD AT 2021

Hydref 2008





CAERPHILLY COUNTY BOROUGH COUNCIL
CYNGOR BWRDEISTREF SIROL CAERFFILI

CAERPHILLY COUNTY BOROUGH
LOCAL DEVELOPMENT PLAN
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1 INTRODUCTION

1.1 The retail sector is an important provider of employment in the County Borough. Shopping is both an essential activity in everyday life and also a growing leisure-time pursuit. As a result, the calibre of shopping provision in retail centres makes a major contribution to people's perception of the quality of urban life generally.

1.2 Town centres perform a variety of roles. They are major employers, providers of services, for example banks, building societies and estate agents, and also provide the main comparison and convenience shopping outlets for the area.

1.3 In recent years however there has been a national trend towards out of town retailing, often at the expense of smaller centres, and this coupled with a rise in car ownership has resulted in a major shift of retailing towards out of town 'one stop' shopping. Another new trend is internet shopping and it is unclear at present just how far this method will grow at the expense of traditional forms in the future.

1.4 The concept of Sustainable Development is now placing importance on reducing the number of journeys made by car and new planning guidance indicates that new retail development should be located within town centres, with edge of town sites preferred should a town centre site not be available. Out-of-centre sites will be assessed against the impact on existing centres, the need to travel and the choice of means of travel.

1.5 Several new superstores have been attracted to centres in the County Borough in recent years, which are helping to improve and maintain the viability and vitality of the towns where they are trading. However, the general trend towards centralisation of retail provision has contributed to the reduction of shops in the smaller local centres.

1.6 This report explores the background and provides the basis for an overall strategy for retailing in the County Borough and the policies proposed for inclusion in the LDP.

2 FORMAT OF THIS BACKGROUND PAPER (BP)

Section A WELSH ASSEMBLY GOVERNMENT POLICY GUIDANCE: A summary of national guidance and the main retail issues arising from it for the LDP

Section B RETAILING PROVISION: An assessment of the existing offer by sector

Section C MEASURES OF VITALITY AND VIABILITY: An assessment of public satisfaction with the larger centres

Section D UNSATISFIED RETAIL DEMAND: An estimation of unsatisfied demand and a realistic assessment of the scope for improvement

Section E MAIN RETAILING GUIDANCE ISSUES ARISING FOR THE LDP: A description of the guidance issues and main policy areas

SECTION A

A WELSH ASSEMBLY GOVERNMENT POLICY GUIDANCE

A.1 Planning Guidance, Technical Advice Notes and circulars will be taken into account in the preparation of the Deposit Local Development Plan. National planning guidance on retailing is contained in the documents '*Planning Guidance Wales (PPW) 2002'* as revised by '*Ministerial Interim Planning Policy Statement - Planning for Retailing and Town Centres (MIPPS) 02/2005*' and '*Planning Guidance Wales: Technical Advice Note Wales 4 1996'.*

A.2 The Assembly Government's objectives for retailing and town centres are to:

- secure accessible, efficient, competitive and innovative retail provision for all the communities of Wales, in both urban and rural areas;
- promote established town, district, local and villages centres as the most appropriate locations for retailing, leisure and for other functions complementary to it;
- enhance the vitality, attractiveness and viability of town, district, local and village centres; and to
- promote access to these centres by public transport, walking and cycling.

A.3 Wherever possible this provision should be located in proximity to other commercial businesses, facilities for leisure, community facilities and employment. Town, district, local and village centres are the best locations for such provision at an appropriate scale. Such co-location of retail and other services in existing centres, with enhancement of access by walking, cycling and public transport, to provide the *opportunity* to use means of transport other than the car, will provide the greatest benefit to communities. This complementary mix of uses should also sustain and enhance the vitality, attractiveness and viability of those centres as well as contributing *to* a reduction of travel demand.

A.4 Vitality is reflected in how busy a centre is at different times and in different parts, attractiveness in the facilities and character which draw in trade. Viability, on the other hand, refers to the ability of the centre to attract investment, not only to maintain the fabric, but also to allow for improvement and adaptation to changing needs.

A.5 Local Planning Authorities should develop through their Community Strategies and Development Plans a clear strategy and policies for retail development, and for the future of town, district, local and village centres in their area, which promote a successful retailing sector supporting existing communities and centres. These plans should establish the existing hierarchy of centres, identify those which fulfil specialist functions and be clear about their future roles. They should identify changing pressures and opportunities and devise appropriate responses to them. In some situations it may be necessary to take pro-active steps to identify town or city centre locations for expansion or in others manage the decline in relative importance of a centre as other centres expand. Dealing with change may mean redefining the boundaries of centres or identifying acceptable changes of use.

A.6 Local Planning Authorities should consider through their development plans whether new sites should be identified in town, district, local or village centres for retail development, leisure development or other uses best located in centres. Uses which need to be accessible to a large number of people, including retailing,

major leisure uses (such as theatres, multi-screen cinemas, bingo halls and bowling alleys), offices of central and local government, commercial offices, hospitals and tertiary education facilities are preferably to be located in town centres. Smaller scale retail provision, including appropriately sized supermarkets, leisure facilities, and other facilities such as local health centres, branch libraries, area offices of the local authority, and primary schools should preferably be located in district, local and village centres.

A.7 In deciding whether to identify sites for retail and leisure developments local planning authorities should in the first instance consider whether there is a need for additional provision for these uses. Such need may be quantitative to address a provable unmet demand for the provision concerned. Precedence should be accorded to establishing quantitative need for both convenience and comparison floorspace particularly as a basis for development plan allocations before qualitative factors are brought into play. Qualitative assessment should cover both positive and negative implications. Where the current provision appears to be adequate in quantity, the need for further allocations must be fully justified in the plan. This may be the case if new provision can be located where:

- it supports the objectives and strategy of an up-to-date development plan or the policies in this guidance
- it is highly accessible by walking, cycling or public transport;
- it contributes to a substantial reduction in car journeys;
- it contributes to the co-location of facilities in existing town, district, local or village centres;
- it significantly contributes to the vitality, attractiveness and viability of such a centre; or where
- it would alleviate a lack of convenience provision in a disadvantaged area.

A.8 Local planning authorities should adopt a sequential approach to selecting sites where a need is identified for such new development. The sequential approach should also be used when allocating sites for the other uses best located in existing centres. Adopting a sequential approach means that first preference should be for town centre locations, where suitable sites or buildings suitable for conversion are available. If they are not then consideration should be given to amending the boundaries of existing centres so that appropriate edge of centre sites are included. Where this is not practical then district and local centres might be considered and, only then, out-of centre sites in locations that are accessible by a choice of means of transport. When proposing a development plan allocation in an edge of centre or out-of-centre location for uses best located in an existing centre, local planning authorities must have regard to need and the sequential test and be able to fully justify the proposal.

A.9 Development plans should:

- establish the strategic role to be performed by the main centres in the retail hierarchy;
- set out measures to reinvigorate particular centres, as appropriate;
- set out detailed policies to achieve vital, attractive and viable centres;
- allocate sites for new retail and leisure facilities and other uses best located in town centres, where there is assessed to be a quantitative or qualitative need using the sequential approach;

- include a criteria based policy against which proposals coming forward on unallocated sites can be judged;
- set out policies for primary and secondary frontages, where appropriate.

SECTION B

B RETAILING PROVISION

Retail Centre Hierarchy

B.1 There are five Principal Town Centres; these being Bargoed serving that part of the Heads of the Valleys Regeneration area (HOVRA), within the County Borough, Blackwood and Ystrad Mynach in the Northern Connections Corridor (NCC), and Caerphilly and Risca / Pontymister in the Southern Connections Corridor (SCC). There are four Key Settlements, namely Rhymney in HOVRA, Newbridge and Nelson in NCC and Bedwas in SCC. Below them in the hierarchy there are a large number of local centres and numerous neighbourhood shops and Individual units serving more immediate needs. There are also long established retail units, typically bulky goods retailers, which are free-standing in edge-of-centre and out-of-centre locations, which complete the retail hierarchy.

B.2 In recent years types of retailing new to the County Borough have appeared in the form of food superstores and retail warehouse units. These have located within the designated town centre and retail warehouse boundaries and often have more retail sales floorspace than the majority of the small centres.

Table 1a Floorspace Totals for the defined Principal Centres

Principal Centres	Convenience Goods / gross sq. m	Comparison Goods / gross sq. m	Total Goods / gross sq. m
Blackwood TC #1	13110	21950	**35060**
Caerphilly TC #1	8390	17720	**26110**
Bargoed TC #1	1770	12830	**14600**
Risca / Pontymister TC #2	2920	3980	**6900**
Ystrad Mynach TC #2	6730	1790	**8520**
Totals	**32920**	**58270**	**91190**

#1 Source: Experian Goad Surveys: Bargoed 2004, Blackwood & Caerphilly 2005
#2 Source: CBC Survey figures 2006, adjusted to gross equivalent

Table 1b Floorspace Totals for the Principal Centre Areas

Principal Towns global area figures	Convenience Goods / gross sq. m	Comparison Goods / gross sq. m	Total Goods / gross sq. m
All Blackwood Area #1	16190	32880	**49070**
All Caerphilly Area #1	18570	35870	**54440**
Bargoed TC #2	1770	12830	**14600**
Risca/Pontymister TC #3	2920	3980	**6900**
Ystrad Mynach TC #3	6730	1790	**8520**
Totals	**46180**	**87350**	**133530**

#1 Sources: Experian Goad Surveys: 2005, plus CBC Survey figures 2006 adjusted to gross equivalent
#2 Source: Experian Goad Survey, 2004
#3 Source: CBC Survey figures 2006, adjusted to gross equivalent

B.3 The figures in Table 1a above provide the data for the units which lie within the defined Town Centre Boundaries. Table 1b above includes the units in edge of centre locations as well. So the gross floorspace data for the “All Blackwood Area”

includes Focus which is trading at Blackwood Gate Retail Park as well as those companies trading at the Pioneer store in Pontllanfraith. In the case of the "All Caerphilly Area" it adds the gross floorspace of Asda and Home Bargains (1400 sq. m) on Pontygwindy Road, Aldi on Bedwas Road, Lidl at Castle Gate and the vacant Castle View store, both on Nantgarw Road, and also the units trading in Gallagher Retail Park (*see Tables 4 & 5*).

B.4 Table 1b shows that the comparison goods gross floorspace for the five Principal Town Areas totals 87,350 sq. m. When the UDP retail topic paper was prepared in 1988 the equivalent total was 28,130 sq. m. net floorspace. Using an assumption that net retail floorspace is generally 70% of gross floorspace, the 1998 data has been adjusted to be comparable with the Table 1 data. The resulting calculation shows an increase of 117% in comparison goods floorspace from 1998 to 2006. This is a huge change, but it is considered that redevelopments, extensions and the new retail areas of North Blackwood, Gallagher Retail Park and Blackwood Gate will account for a good part of the difference. In terms of the remaining difference, the present conclusion is that the 1998 council data under-represented the comparison floorspace in all the smaller owner-occupied shops which make up a large proportion of the provision.

Table 2 Centres with Over Five Retail Units Trading

Centre	Comparison	Convenience	Total
Blackwood	92	15	107
Caerphilly	95	11	106
Bargoed	46	13	59
Risca / Pontymister	32	11	43
Ystrad Mynach	32	8	40
Newbridge (KS)	26	8	34
Pontllanfraith (all parts)	15	6	21
Nelson (KS)	12	6	18
Abertridwr	6	7	13
Pontlottyn	7	5	12
New Tredegar	7	5	12
Aberbargoed	8	4	12
Bedwas (KS)	5	6	11
Fleur de Lys	7	4	11
Trethomas	7	2	9
Crumlin	3	6	9
Cwmcarn	4	5	9
Rhymney (KS)	4	4	8
Cefn Fforest	5	3	8
Llanbradach	7	1	8
Crosskeys	4	4	8
Senghenydd	5	2	7
Cwmfelinfach	4	2	6

KS: Key Settlement
Source: Caerphilly CBC Surveys, 2006

B.5 Table 2 above gives an indication of the size of the smaller centres relative to the five main centres in the hierarchy. The data for the first five named centres relates to the proposed respective designated Principal Town Centres. In terms of the four designated Key Settlements, Newbridge is by some margin the largest retail centre having 3620 sq. m gross floorspace.

B.6 Table 3 below shows the extent to which national multiple retailers have found our largest centres to be desirable locations for their branches. The Council does not have equivalent figures from 1998.

Table 3 Numbers of National Multiple Retailers as % of totals

Centre	Comparison	Convenience	Total
Blackwood TC	43%	63%	**46%**
Caerphilly TC	46%	50%	**46%**
Bargoed TC	33%	25%	**31%**

Source: Experian Goad Surveys: Bargoed 2004, Blackwood & Caerphilly 2005

Convenience Goods Retailing

B.7 Examples of Convenience Goods include food, alcoholic and non-alcoholic drinks, tobacco, newspapers, magazines and other non-durable household goods.

Food Retailing

B.8 Table 4 below lists the main foodstores in the County Borough. It also includes entries for future stores with planning consent, and LDP proposals. These are included in order to show the potential commitment to further provision, but naturally, their expected floorspace sizes are not yet included in Tables 1 or 2.

B.9 Caerphilly was the location for South Wales's first superstore for Carrefour (now replaced by an Asda store), and this was followed by the Pioneer superstore at Pontllanfraith. For a long period after that there were few modern developments in food retail provision in the County Borough apart from Gateway (recently, Somerfield) at Blackwood and Kwik Save stores in numerous locations.

B.10 In the 1990s Safeway opened a superstore at Castle Court in Caerphilly, Tesco came to Ystrad Mynach, Aldi to Blackwood and Lidl to Castle View, Caerphilly. In the early 2000s, Morrisons bought and rebranded the Safeway superstore, Asda opened in Blackwood, and Lidl came to Risca. In 2006, Somerfield rationalised most of its Kwik Save stores by rebranding some as Somerfield stores and selling the rest off. They had already closed the Kwik Save in Blackwood and sold another at Pontygwindy Road in Caerphilly to Netto. In addition, they rebranded the Kwik Save stores at Nelson, Newbridge, and Tiryberth as Somerfield stores. The Kwik Save store in Bargoed was sold to CK's Supermarkets, and Aldi bought the Kwik Save stores at Pontymister and Rhymney. Early in 2007 Lidl opened a store on Pengam Road in Ystrad Mynach, and Aldi opened on Bedwas Road in Caerphilly. Aldi also bought the Somerfield store in Tiryberth when it closed down. More recently, the Somerfield store in Blackwood closed and so did the Netto store on Pontygwindy Road in Caerphilly. Finally, a new Lidl store has opened at Castle Gate in Caerphilly following the closure of their smaller store opposite at Castle View.

B.11 Taken together, the large food stores identified in Table 4 below that are trading, represent a total of 50,400 sq. m of gross retail floorspace. In 1998 when the UDP retail topic paper was prepared, the large food stores totalled 24,250 sq. m of net retail floorspace. Assuming that net retail floorspace is generally 70% of gross floorspace, the 1998 data has been adjusted to be comparable with the new data. The resulting calculation shows there was an increase of 45% in large food store floorspace from 1998 to 2008.

B.12 It is the intention that the LDP policy should build on the new food store provision which has been successfully attracted to our main town centres over the last two decades. Looking to the immediate future, the Cardiff Road redevelopment in Caerphilly town centre contains a proposal for a 2,240 gross sq. m food store in addition to 4,480 gross sq. m of other retailing space. In addition, the Council is completing negotiations (*June 2008*) to secure a private sector partner for the construction of a food superstore, other retail units, and a cinema retail development at Bargoed. This proposal is in line with the HOVRA strategy and also implements the retail site allocation identified in the UDP. A planning application has been lodged by Tesco (*June 2008*) for a food and comparison goods store of 10,200 sq. m gross floorspace in Risca / Pontymister. Finally, there is a food store allocation for the Lawn in Rhymney which is in an edge of "shopping street" location and also in accord with the HOVRA strategy.

Table 4 Larger Foodstores (over 350 gross sq. m)

Centre	Gross	Name	Location*
Blackwood	6,960	Asda	TC
Blackwood	3,080	Pioneer, Pontllanfraith #	OOC
Blackwood	2,740	Former Somerfield	TC
Blackwood	1,290	Aldi	TC
Blackwood	580	Iceland	TC
Blackwood	400	Farm Foods	TC
Caerphilly	7,010	Asda, Pontygwindy Road	OOC
Caerphilly	5,060	Morrisons	TC
Caerphilly	*2,240 consented*	*Consent at Cardiff Road*	*TC*
Caerphilly	1,680	Lidl, Castlegate	OOC
Caerphilly	1,680	Aldi, Bedwas Road	EOC
Caerphilly	1,060	Former Lidl, Castle View	OOC
Caerphilly	930	Tesco Metro	TC
Caerphilly	490	Iceland	TC
Bargoed	*5,500 estimate*	*Proposed Superstore*	*TC*
Bargoed	680	CK's Supermarket	TC
Risca / Pontymister	*5,100 estimate*	*Proposed Tesco #*	*EOC*
Risca / Pontymister	1,570	Aldi, Pontymister	OOC
Risca / Pontymister	1,430	Lidl	TC
Risca / Pontymister	*535 consented*	*Consent for Tesco Metro*	*TC*
Ystrad Mynach	6,410	Tesco	TC
Ystrad Mynach	1,760	Lidl	TC
Ystrad Mynach	*500 estimate*	*Foodstore at Penallta*	*OOC*
Newbridge	840	Somerfield	TC
Nelson	1,550	Somerfield	OOC
Rhymney	1,570	Aldi	OOC
Rhymney	*1,500 estimate*	*Food Store Allocation*	*EOC*
Tiryberth	1,630	Aldi	OOC
TOTAL	**50,400**		

* TC Town Centre location
* EOC Edge-of-Centre location
* OOC Out-of-Centre location
\# Pioneer is 6,160 sq. m gross floorspace; the rest being comparison goods sales area
\# Tesco will be 10,200 sq. m gross floorspace; the rest being comparison goods sales area

Sources: Experian Goad Surveys & Caerphilly CBC Surveys

Comparison Goods Retailing

B.13 Examples of Comparison Goods include books, clothing, footwear, furniture, floor coverings, household textiles, audio-visual equipment, hardware, DIY supplies, Chemist's goods, jewellery, watches, clocks, bicycles, recreational and other miscellaneous durable goods.

B.14 The Comparison Goods gross floorspace totals for the Principal Town Centres are shown in Table 1 above. In the past, improvements to comparison goods provision have been achieved by large-scale extensions to our largest centres, such as the Castle Court development in Caerphilly or the North Blackwood Retail Park built around Asda. The UDP retail strategy has been to attract large food stores to each of our Principal Town Centres to act as a catalyst to encourage more comparison goods retailing developments in those centres. It is the intention that the LDP policy should build on this successful performance.

B.15 It is not anticipated that there should be a further significant spatial expansion of these principal centres, because such development would encroach into residential areas and possibly lose retail centre cohesion. Instead, it is hoped that redevelopment schemes may come forward to increase total floorspace within the existing principal town centre boundaries.

B.16 A number of small-scale redevelopments of existing premises have already occurred in Blackwood and a significant redevelopment proposal has been granted consent for one side of Cardiff Road in Caerphilly town centre. The latest proposals for this development will involve the creation of approximately 4,480 gross sq. m of modern retailing comparison goods floor space, a new library and new apartments in addition to the food store mentioned in paragraph B.12 above. The total net increase in retail floorspace over the existing vacant and underused old provision will be approximately 3,000 sq. m. Further large-scale redevelopments of this nature may well be proposed in the future for our designated Principal Town Centres.

Retail Warehousing

Table 5 Retail Warehousing Parks (gross floorspace in sq. m)

Location	Floorspace	Store
Gallagher, Caerphilly	3,020 #	Focus
Gallagher, Caerphilly	5,470	B&Q
Gallagher, Caerphilly	1,000	Carpetright
Gallagher, Caerphilly	1,000	Currys
Gallagher, Caerphilly	700	Dreams
Gallagher, Caerphilly	700	Halfords
Gallagher, Caerphilly	1,480	MFI
Gallagher, Caerphilly	1,210	Jupiter
Gallagher, Caerphilly	*930*	*Consented Phase 2 Unit*
Gallagher, Caerphilly	*930*	*Consented Phase 2 Unit*
Gallagher, Caerphilly	*8,750*	*Phase 3 under construction*
Gallagher, Caerphilly	*6,510*	*Consented Focus redevelopment*
Sub Total	**28,680**	
Blackwood Gate	3,400	Focus
Blackwood Gate	4,450	Vacant Units
Sub Total	**7,850**	

this store to be demolished and redeveloped

Source: Caerphilly CBC Survey

B.17 While there are a number of locally based firms supplying the building trade and retail DIY customers, there is only modest market presence in the County Borough in terms of the national multiple retailers within this sector. In view of the size of the resident population and the large under-served catchment available in the central area, this is somewhat surprising. The occupants of the two designated retail parks are listed in Table 5 above. The Gallagher Retail Park is north east of Caerphilly town centre, and the Blackwood Gate Retail Park is south of Blackwood town centre. The Gallagher site has the potential for further retail developments as identified in Table 5 above, while the Blackwood Gate site is fully developed but is yet to find occupants for over half of the space constructed.

Quality of Provision

B.18 There are small areas of modern pedestrianised retail development in both the Caerphilly and the Blackwood shopping centres. However, the major part of these two centres and all the other centres can best be described as traditional shopping areas, without comprehensive rear servicing, nor indoor shopping arcades, nor necessarily adequate and convenient car parking, nor many shops built to modern standards. They are also characterised by environments dominated by traffic. However, Blackwood's centre was relieved of through traffic by the opening of the Sirhowy Enterprise Way at the end of 2005, and Bargoed's centre will be similarly assisted by the completion of Angel Way by 2009.

B.19 Many of the free-standing out of centre stores, particularly the older ones, are not at convenient or accessible locations and have poor local environments, while none are grouped together to offer the benefits of shared facilities and comparison shopping.

B.20 As a result, even now, the County Borough's retail facilities do not fully meet the needs of its residents. Generally speaking, there is still room for improvement in terms of building stock and shopping environments. There are continuing large outflows of expenditure from most areas of the County Borough in every shopping category, but especially in durable (i.e. non-food) goods. The situation has improved markedly from the 1980s in terms of some sectors and with regard to some of the centres, but further provision and enhancement can be justified.

SECTION C

C MEASURES OF VITALITY AND VIABILITY

C.1 It is important to know the health of our retail centres. There are several categories of information that can be collected on shopper habits, which when taken together, provide a picture of the vitality of the retail centres. The Borough Council collects in depth information on the six largest retail centres, Blackwood, Caerphilly, Bargoed, Newbridge, Risca / Pontymister and Ystrad Mynach and commissioned CACI studies on the top three.

C.2 In addition, the Borough Council undertakes an annual survey to ascertain the names of traders and hence the range of retail provision in thirty six centres. This survey work also identifies the level of retail property vacancy rates in those centres. All these findings can then be taken into account when considering the impact of new development proposals.

CACI Study

C.3 In 2006 the County Borough Council commissioned CACI to undertake studies of Caerphilly, Blackwood and Bargoed in order to understand the role that the town centres perform within the region and the preferences and demands of shoppers using the towns. CACI have used a combination of lifestyle data, expenditure models, gravity model simulation and benchmarking techniques to evaluate the centres and their position within the retail hierarchy. Summaries presenting the opportunities of each town centre to prospective tenants and investors appear below under the relevant town headings.

Shopper Attitude Surveys

C.4 Shopper Attitude Surveys have been carried out for the Council on a triennial basis since 1994. The aim of this research is to obtain information on shopping patterns within the County Borough, to aid the formulation of appropriate retail policies for inclusion in the Development Plan system. Previously, this meant the Unitary Development Plan and for the near future it will guide relevant policies for the Local Development Plan and the determination of large retailing proposals. In addition, the information could be useful in formulating future Town Centre Action Plans if deemed appropriate and Site Development Briefs, and also provides support for bids for finance to WAG for town centre improvement.

C.5 The analysis of the survey work, centre by centre, year by year, can be found in six stand-alone reports on the Council's website but the principles involved in the collection process are described below.

C.6 The main requirements of the surveys have been to:

(i) establish where and how often residents and visitors shop for their food and non-food purchases within the County Borough;

(ii) establish for what reasons residents and visitors visited the shopping centres of the County Borough;

(iii) establish attitudes of shoppers towards the retail centres of the area; and

(iv) determine the means of transport used by shoppers.

C.7 In order to obtain this information the following surveys were undertaken:

(i) A County Borough wide random telephone survey of households, undertaken during the daytime and evening; and

(ii) Street interviews within the two sub regional centres of Blackwood and Caerphilly and the four other main centres of Bargoed, Newbridge, Risca / Pontymister, and Ystrad Mynach.

Telephone Survey

C.8 There is a wealth of information available in the raw data, but for the purposes of this topic paper, the report analysis concentrates on those issues considered to be the most important. The results of all the surveys conducted since 1994 are compared where possible in order to identify any changes or differences over time.

C.9 The analyses, centre by centre, concentrate on the following issues:

- the choice of retail centre for the main household food purchase;
- the choice of retail centre for purchases of clothes and footwear etc.;
- the choice of retail centre or retail warehouse park for bulky goods purchases;
- the residents approval rating of the six main town centres in the County Borough as places in which to go shopping.

C.10 In the analysis of the telephone data the County Borough is divided into six catchment areas, each centred on one of the major towns.

- Caerphilly catchment area includes Caerphilly town, Senghenydd, Abertridwr, Llanbradach, Bedwas and Trethomas, Machen, and Rudry, Waterloo and Draethen.
- Blackwood catchment includes the town itself, Argoed, Cefn Fforest, Penmaen, Pengam, Pontllanfraith and Ynysddu.
- Bargoed catchment includes the town itself, Rhymney, Fochriw, Pontlottyn, Abertysswg, Deri, New Tredegar, Aberbargoed and Gilfach.
- Newbridge catchment includes the town itself, Crumlin and Abercarn.
- Risca catchment includes Risca East and Risca West and Crosskeys.
- Ystrad Mynach catchment includes the town itself, Penpedairheol, Tiryberth, Gelligaer, Hengoed, Nelson, and Maesycwmmer.

Street Interviews

C.11 The on-street shopping surveys are carried out at various locations within them. Approximately 200 interviews are undertaken in both Caerphilly and Blackwood, while 150 are sought in each of the other centres. The results of all the surveys conducted since 1994 are compared where possible in order to identify any changes or trends over time.

C.12 The analyses, centre by centre, concentrate on the following issues:

- the reason for visiting the centre
- the mode of travel
- the time taken to make the journey

- the dislikes about the centre

Caerphilly

C.13 Caerphilly is one of the two largest towns in the County Borough. The Caerphilly catchment area includes the town, along with Senghenydd, Abertridwr, Llanbradach, Bedwas and Trethomas, Machen, and Rudry, Waterloo and Draethen and this area has a total population of approximately 53,000. It is a popular tourist destination, due to the presence of the largest Norman castle in Wales within the town centre. In retail terms, it is the most popular and important centre in the County Borough, boasting the Castle Court retail development and good rail and road links to the rest of the Borough.

Caerphilly CACI Study

C.14 CACI‘s Retail Footprint model currently classifies Caerphilly as a ‘Metropolitan Town‘ in the hierarchy of UK shopping destinations. Metropolitan Towns are typically located just outside the suburban fringe of city centres, meaning that their catchments are influenced by the dominant centres in the area. In this case, Cardiff has an important influence on shopping patterns in Caerphilly‘s catchment.

C.15 The market position of existing retailers in the town (an even split between 50% Mid market and 50% Value) places Caerphilly in Retail Footprint‘s ”Value Metropolitan Towns‘ Minor Class. Other examples of Value Metropolitan Towns include Leigh, Bletchley and Sutton-in-Ashfield.

C.16 **Key Findings of the Caerphilly CACI Study**

- CACI‘s Retail Footprint model shows that Caerphilly‘s retail catchment contains 909,600 residents with annual comparison goods expenditure of £1.9 billion
- Caerphilly town centre captures 4.7% of this expenditure, representing £89.5 million of annual comparison goods expenditure
- In the Primary sub catchment (where 50% of shoppers originate), Caerphilly‘s market share is 35%
- In CACI‘s national ranking of Retail Footprint town centres, Caerphilly is ranked 310th, above Tonbridge, Falmouth and Dartford. In the ranking of Welsh town centres, Caerphilly is in 17th place, ahead of Abergavenny, Llandudno and Aberdare
- Tourists are a significant source of additional potential in Caerphilly, representing £2.3 million of retail spend per annum, or 2.5% of the current retail market
- The total Clothing & Footwear market in Caerphilly is worth an estimated £24.9 million per annum, representing 28% of total expenditure potential. Within this sector, Womenswear is the largest retail category (£11.0 million per annum). Spend on Durable Goods also makes a significant contribution to annual expenditure (£26.5 million or 30% of potential expenditure)
- Expenditure per household in Caerphilly is above the Welsh national average in the vast majority of retail categories. In terms of value, spend is highest on Womenswear, Menswear, Music &Video and Toys & Hobbies

- Caerphilly has a broad-based ACORN lifestyle profile covering a range of life stages and affluence levels, but biased towards families. The town has strong concentrations of Flourishing Families, Secure Families, Blue Collar Roots and Struggling Families
- Caerphilly's market size and ACORN profile make it similar to towns such as Castleford, Wellingborough and Sittingbourne
- The town offers particularly strong opportunities in the Womenswear, Menswear, Leisure Goods and Leisure sectors (where including restaurants, coffee shops, etc), Caerphilly is under-provided relative to similar centres
- In terms of market position, Caerphilly offers strong opportunities for mid market retailers, which are under-represented relative to similar centres, e.g. Next, Marks & Spencer, Dorothy Perkins, Millets and Edinburgh Woollen Mill
- Overall, Caerphilly represents a strong opportunity for good quality retailers to satisfy demand from currently under-served comfortably off and affluent residents, and better serve family-oriented shoppers, providing them with an attractive local alternative to Cardiff

Caerphilly Shopper Attitude Surveys

C.17 **Main findings of the Telephone Survey for Caerphilly:**

- Respondents living in the Caerphilly catchment area specified a large number of different stores that they visited to purchase their food and grocery items. In all previous studies the number of respondents who shopped in Caerphilly had remained consistently above the 80% figure, although in the 2006 survey the figure fell below this (77.2%).
- Nearly half (46%) of all respondents listed Asda, Pontygwyndy Road, Caerphilly as the store where they buy most of their household food and grocery items. Morrisons, Caerphilly Town Centre was second, and was listed by just under a fifth (19.2%) of respondents, with under a tenth (7.2%) of respondents stating Tesco Metro in Caerphilly Town Centre as the third most popular location. The fourth most quoted store was Tesco in Ystrad Mynach (listed by 5.6% of respondents); with Tesco, Upper Boat, Pontypridd and Sainsburys, Thornhill, Cardiff both at number five (listed by 4% of respondents each store).
- Three respondents within the Caerphilly catchment area had stated that they used the Internet for their household's food and grocery shopping. This represents a tiny percentage, but is the highest number of respondents using this method to shop for food compared with the findings from the five other catchments.
- Morrisons in Caerphilly was the most favoured choice for top-up shopping (13.8% of respondents). The second most used, was Tesco Metro, Caerphilly Town Centre (listed by 12.8% of respondents). The majority of respondents in the Caerphilly area tend to do their top-up shopping within the catchment area.
- When reviewing the previous surveys for this study, the results show that Cardiff has dominated the market for non-food purchases. These previous surveys also showed that Caerphilly was the other top location to visit for these types of goods.

- The 2006 results show that the Cardiff area was once again the location attracting the greatest proportion for non-bulky non-food items (listed by 45.6% of respondents), and the next most visited place was still Caerphilly, totalling just under a third (32%) of all respondents.
- As an alternative to their main centre of choice, the largest number of respondents visit Caerphilly Town Centre (16.4%) for non-bulky non-food items. A further eighth of respondents (12.4%) stated that they visit Cardiff City Centre. Newport City Centre came in a close third with 11.9% choosing this location. A third of respondents stated that they do not visit any other centre for non-food shopping.
- It is apparent that Caerphilly has become the leading destination to shop for bulky non-food items for respondents from within the Caerphilly catchment area. Over two fifths of respondents (41.6%) who buy bulky non-food items choosing to shop there. This figure was a reduction from the 49.2% found in 2003).
- Cardiff was the second location of choice as a place for shopping for these items, with just over a sixth (17.2%) of respondents stating so, of which has shown that the proportion of people visiting this area has decreased since 2003.
- Respondents based in the Caerphilly catchment area specified a large number of stores, which they visited to purchase most of their bulky non-food items. The stores/areas they indicated can be seen in figure 3.2.5. 20.4% of respondents chose B&Q, Gallagher Retail Park, Caerphilly. The remainder of stores at the Retail Park attracted a further 18%. The next most popular area after Gallagher Retail Park was Cardiff City Centre, named by 6.8% of respondents.
- Through the survey years, Caerphilly has become the most popular choice for bulky non-food shopping, having displaced Cardiff into second place.
- Some 206 respondents (82.4%) travelled by car/van for shopping, and they were asked how often they have access to the vehicle. The majority stated that they have access to a car/van all the time.
- Those 234 respondents who indicated they visited Caerphilly (Figure 3.4.2) stated a range of reasons for visiting their local area for shopping. Over two thirds of the respondents (70.1%) stated it was because it was close and/or convenient to home and just over a tenth (11.1%) said they go to Caerphilly to visit a particular shop.
- The small number of respondents (6.4%) who indicated they did not visit Caerphilly were also asked for their reasons. A quarter of them gave poor choice of shops as their reason. In addition, almost a fifth of respondents (18.8%) cited the poor choice of non-food shops, and a similar percentage stated it was due to Caerphilly being inconvenient.
- The highest proportion of respondents, (28.4%), would prefer to have better choice/range of non-food shops within their local area for shopping. Under a tenth of respondents stated they would prefer to have improved parking facilities (7.6%).

C.18 **Main findings of the On-Street Survey for Caerphilly:**

- The most popular reason for visiting Caerphilly town centre continues to be non-food shopping, as just under a third (32%) stated this as the main reason for their visit. In past surveys there had been a continuing increase in numbers giving this reason to visit. However, this trend appears to have stopped, as the 2006 figure represents a drop in percentage points of 19%.
- The second most popular reason for visiting Caerphilly town centre was, as mirrored in previous surveys, to go food and grocery shopping (28%). In a contrary pattern to the non-food shopping trend, the increased number of respondents going food shopping has reversed the declining trend from previous surveys.
- The majority of respondents (90%) had gone straight from their home to Caerphilly, with the remainder doing so from Work (7%) or a relative's house (2%). Specifically, just over half had come from Caerphilly (57%), with Cardiff (7%) and Ystrad Mynach, Blackwood and Machen (all 4%) being the other starting locations of note.
- The most popular mode of travelling to Caerphilly was by means of a car or van as the driver of the vehicle, which was chosen by over half (54%) of all respondents. This figure is an increase from 2003 when around two-fifths (41%) of all respondents stated they used this mode. Conversely, the proportion of people travelling to Caerphilly on foot, one fifth of all respondents (20%), has decreased dramatically by ten percentage points from the 2003 figure. Both the increase in car users and the decline of those who walk to Caerphilly town centre, are the reverse of the culture from 1997 – 2000.
- The most popular parking location used by those travelling by car to Caerphilly town centre was the Castle Court / Morrisons store car park, which was used by three fifths (60%) of respondents travelling by car.
- The proportion of people travelling to Caerphilly for over 20 minutes and longer (15%) has increased by one-third from 2000 (10%), and more than doubled from the 1997 figure (7%). This suggests that Caerphilly is attracting people from an ever wider area. This year's survey also saw the highest proportion of people travelling for more than 30 minutes (8%) to Caerphilly. However, the number of respondents travelling for up to 5 minutes remains relatively low (14%), as it was in 2003.
- Half of all respondents (50%) stated that they had spent, or were likely to spend, between £1 and £20 during their visit. Of those, just over a quarter (27%) said that they would be spending/had spent less than ten pounds, with a further quarter (23%) stating somewhere in between £11 - £20.
- Caerphilly's location and convenience was the aspect that respondents most liked about the town centre (34%). The second most popular factor (15%) that respondents liked was the castle and the historical aspects associated with Caerphilly. One tenth of respondents particularly liked the range of shops on offer in the town.
- A "better range of shops needed" (25%) was the most popular response given by on-street interviewees, when asked what one thing they particularly disliked about Caerphilly. Just over a tenth (12%) found it "difficult to find parking" in Caerphilly and a similar number (10%), thought that there was too much traffic/congestion.

Blackwood

C.19 Blackwood is one of the two largest towns in the County Borough. The catchment area has a population of approximately 34,000 and includes Argoed, Cefn Fforest, Penmaen, Pengam, Pontllanfraith and Ynysddu. The town is situated on the A4048 and is now busy and prosperous.

Blackwood CACI Study

C.20 CACI's Retail Footprint model currently classifies Blackwood as a 'Rural Centre' in the hierarchy of UK shopping destinations. Rural Centres tend to serve the local community effectively and have fairly high levels of loyalty from local shoppers due to the 'cost' (in terms of time) of travelling to an alternative centre. Rural Centres tend to be large enough to support the basic needs of a local catchment.

C.21 Blackwood's market size places it in Retail Footprint's 'Rural Centres' Minor Class, as opposed to 'Small Rural Centres'. The market position of existing retailers in the town is split between 44% mid market retailers and 56% value. Other examples of Rural Centres include Thetford and Ebbw Vale.

C.22 **Key Findings of the Blackwood CACI Study:**

- CACI's Retail Footprint model shows that Blackwood's retail catchment contains 395,800 residents with annual comparison goods expenditure of £795 million
- Blackwood town centre captures 5.8% of this expenditure, representing £45.9 million of annual comparison goods expenditure
- In the core catchment (where 75% of shoppers originate), Blackwood's market share is 21%. Within the Primary catchment alone (where 50% of shoppers originate), Blackwood's market share is almost 40%
- In CACI's national ranking of Retail Footprint town centres, Blackwood is ranked 447th above Fleetwood, Ludlow and Minehead. In the ranking of Welsh town centres, Blackwood is in 22nd place, ahead of Colwyn Bay, Newtown and Cardigan
- Tourists are an important source of additional potential in Blackwood, representing £910,000 of retail spend per annum, or 1.9% of the current retail market
- The total Clothing & Footwear market in Blackwood is worth an estimated £12.7 million per annum, representing 28% of total expenditure potential. Within this sector, Womenswear is the largest retail category (£5.6 million per annum). Spend on Durable Goods also makes a significant contribution to annual expenditure (£13.5 million or 29% of potential expenditure)
- Expenditure per household in Blackwood is on a par with or above the Welsh national average in the majority of retail categories. In terms of value, spend is highest on Womenswear, Menswear, Music & Video and Toys & Hobbies
- Blackwood has a broad-based ACORN lifestyle profile covering a range of life stages and affluence levels, but biased towards families. The town has strong concentrations of Secure Families, Post-Industrial Families, Blue Collar Roots and Struggling Families
- Blackwood's market size and ACORN profile make it similar to towns such as Leeds - Morley, Chester Le Street, Sutton-in-Ashfield and Rushden
- The town offers particularly strong opportunities in the Fashion, Health &

Beauty, Leisure Goods, Household Goods and Leisure sectors (including restaurants, coffee shops, etc), where Blackwood is under-provided relative to similar centres

- In terms of market position, Blackwood offers opportunities for good quality middle market retailers, which are under-represented relative to similar centres, e.g. Clarks, Adams, Burton, Evans and Warren James
- Overall, Blackwood represents a strong opportunity for good quality retailers to satisfy demand from currently under-served comfortably off residents in the town's catchment, and better serve local family-oriented shoppers

Blackwood Shopper Attitude Surveys

C.23 **Main findings of the Telephone Survey for Blackwood:**

- Respondents living in the Blackwood area identified a large number of different stores which they visited to purchase their food and grocery items. In the earlier surveys there was a pattern of decreasing numbers of residents using Blackwood as a location for food shopping. Trade decreased from 86.9% in 1994 to 64.2% in 2000 with catchment residents being attracted to the Tesco store at Ystrad Mynach by 2000, and also increasingly to Caerphilly.
- This all changed in 2003 with the opening of Asda in Blackwood and Morrisons in Rogerstone. By 2006 survey results have revealed that the number of residents shopping for food and grocery items in Blackwood has decreased once more, but this time from 72.2% in 2003 to 55.6% in 2006. Of those that shop in Blackwood, the majority, 46.4% shop at Asda in Blackwood (a reduction from 49.4% in 2003).
- Looking at the 2006 results overall, nearly half of all respondents listed Asda in Blackwood as the store where they buy most of their household food and grocery items. Morrisons, Rogerstone, was second, and was listed by just under a fifth (17.6%) of respondents, with a tenth (10%) of respondents stating Tesco, Ystrad Mynach as the third most popular location. The fourth most quoted store was Somerfield, Blackwood (listed by 5.6% of respondents), with Pioneer, Pontllanfraith at number five (4.8%) and Aldi, Blackwood at number six (2.4%).
- These figures show that Asda in Blackwood is the most popular choice for top-up shopping (16% of all respondents), which is consistent with its use for main food shopping also (46.4% of all respondents). Others most used were the local stores in Blackwood, Pontllanfraith and Oakdale. In fact the majority of respondents in the Blackwood catchment area tend to do their top-up shopping within it.
- When reviewing the previous survey data, the 2003 results for non-bulky non-food items showed that the highest proportion of respondents shopped in Cardiff for non-food goods (33.1%). That year was the only time Cardiff led the field, but every survey has shown that Blackwood, Newport and Cardiff, were the top locations visited for these types of goods, by respondents in the Blackwood catchment area.
- In 2006 the results show that the towns with the greatest proportion of visits were Blackwood and Newport (listed by 30.4% and 28.4% of respondents respectively), and the next most visited place was Cardiff totalling a fifth (20.4%) of all respondents.

- Caerphilly remains the leading destination to shop for bulky non-food items within the Blackwood catchment area with over a fifth of respondents who buy bulky non-food items (20.4%) choosing to shop there. Newport was the second location of choice as a place for shopping for these items but the percentage of people visiting there has decreased from 19.9% in 2003 to 17.2% in 2006. Conversely Cardiff, the third choice, has fallen from 15.9% in 2003 to 12% in 2006.
- Some 220 respondents (88%) travelled by car/van for shopping, and they were asked how often they have access to the vehicle. Over four fifths stated that they have access to a car/van all the time.
- Some 213 respondents indicated they visited Blackwood and they stated a number of reasons for visiting their local area for shopping. Almost two thirds of the respondents (60.6%) stated it was because it was close and/or convenient to home and under a tenth (6.6%) said they go to Blackwood to visit a particular shop.
- Similarly those respondents, who indicated they did not visit Blackwood, also stated a number of reasons for not visiting their local area for shopping. Nearly a third (29.7%) of respondents stated that it was inconvenient and just under a fifth (18.9%) stated it was because of poor access and parking.
- Apart from a third of respondents who feel no improvements are needed, the next highest proportion of respondents, just over a sixth (17.6%), would prefer to have a better choice / range of non-food shops within their local area for shopping.
- Since the four surveys started, Blackwood has had the highest (70.8%) approval rating out of all six centres in the County Borough from 1994 to 2003. The 2006 survey has shown that Blackwood still remains the highest of all six centres.

C.24 **Main findings of the On-Street Survey for Blackwood:**

- Food and grocery shopping (42%) and non-food shopping (39%) were the main reasons for respondents visits to Blackwood. This is a familiar pattern from previous surveys, with the number of non-food shoppers increasing slightly from the 2003 survey (36%).
- The majority of respondents (98%) had gone straight from home to Blackwood, with the remainder doing so from work (2%).
- Specifically, just over two fifths came from Blackwood (43%), with Pontllanfraith (12%) Newbridge (5%) and New Tredegar (5%) being the other starting locations of note.
- The most popular method of transport was on using a car / van as driver, as just under half (45%) of all respondents stated that they had driven to the town centre. Those travelling by bus / coach equated for slightly under a quarter (24%). The number of people walking to Blackwood has declined, from 21% in 2003 to 16% in the current survey.
- Those respondents travelling by car were most likely to use a pay and display car park (43%) or the Asda voucher car park (24%) when parking in Blackwood.
- The majority of shoppers, approximately half (50%), travel for between 5 and 10 minutes, indicating that there is a strong local component to the

nature of the catchment area for shoppers. A further quarter (27%) travel somewhere between 11 and 20 minutes to get to Blackwood.

- Three fifths (60%) of all respondents visit the town centre at least twice a week or more frequently. Of those, just under a fifth (18%) visit Blackwood on a daily basis and a further two fifths visit 2-3 times a week (42%).
- Around a quarter of all respondents had spent, or were expecting to spend, between £11 - £20 during their shopping trip, with a further fifth (21%) estimating less than a ten pound spend.
- Only 5% of those people surveyed in Blackwood didn't expect to be spending any money whilst on their visit.
- Blackwood's location and convenience was the aspect that respondents most liked about the town centre (34%). Around a quarter (24%) liked the range of shops available in Blackwood and one seventh (14%) were impressed with the choice of shops in the town.
- Somewhat positively, two fifths of respondents (40%) couldn't state anything that they particularly disliked about Blackwood town centre. Around a quarter thought that there was "too much through traffic / congestion / buses" (23%). A small percentage showed a particular dislike for the difficulty to find parking (6%)

Bargoed

C.25 Bargoed is the most northern of the six main retail centres in the Borough and is located in the Rhymney Valley. It is the third largest town centre in the Borough, behind Caerphilly and Blackwood. The catchment area of the town includes Rhymney, Fochriw, Pontlottyn, Abertysswg, Deri, New Tredegar, Aberbargoed and Gilfach and has a combined population of over 26,000.

C.26 The A469 runs directly through the town centre, providing an important linkage between the north and central areas of the County Borough. The location of the main road through the retail centre causes considerable congestion. Rail access to both Cardiff and Rhymney is also available from Bargoed station. These transport links are essential, as the Bargoed catchment area is the largest of the six catchment areas in the Borough.

Bargoed CACI Study

C.27 CACI's Retail Footprint model currently classifies Bargoed as a 'Rural Centre' in the hierarchy of UK shopping destinations. Rural Centres tend to serve the local community effectively and have fairly high levels of loyalty from local shoppers due to the 'cost' (in terms of time) of travelling to an alternative centre. Rural Centres tend to be large enough to support the basic needs of a local catchment.

C.28 Bargoed's market size places it in Retail Footprint's 'Rural Centres' Minor Class, as opposed to 'Small Rural Centres'. The market position of existing retailers in the town is split between 35% mid market retailers and 65% value. Other examples of Rural Centres include Thetford and Ebbw Vale.

C.29 **Key Findings of the Bargoed CACI Study:**

- CACI's Retail Footprint model shows that Bargoed's retail catchment contains 272,100 residents with annual comparison goods expenditure of

£541 million

- Bargoed town centre captures 3.7% of this expenditure, representing £20.1 million of annual comparison goods expenditure
- In the core catchment (where 75% of shoppers originate) Bargoed's market share is 13%. Within the Primary catchment alone (where 50% of shoppers originate), Bargoed's market share is just under 21%
- The total Clothing & Footwear market in Bargoed is worth an estimated £5.6 million per annum, representing 28% of total expenditure potential. Within this sector, Womenswear is the largest retail category (£2.5 million per annum). Spend on Durable Goods also makes a significant contribution to annual expenditure (£5.8 million or 29% of potential expenditure)
- Expenditure per household in Bargoed is average or above average compared to Wales as a whole in the Jewellery, Computer Games / Consoles, Toys & Hobbies and TV, Audio & Video categories. In terms of value, spend is highest on Womenswear, Menswear, Music & Video and Toys & Hobbies
- Bargoed's ACORN lifestyle profile is biased towards households with moderate or low incomes. The town has strong concentrations of the Blue Collar Roots and Struggling Families groups
- Bargoed's market size and ACORN profile make it similar to towns such as Maesteg, Pontypool, Heywood, Denton, and Harwich
- The town offers particularly strong opportunities in the Menswear, Childrenswear, Jewellery, Leisure Goods, Electrical Goods and Leisure sectors (including restaurants, coffee shops, etc), where Bargoed is under-provided relative to similar centres
- In terms of market position, Bargoed offers opportunities Mid and Lower Mid market retailers, which are under-represented relative to similar centres, e.g. New Look, Ethel Austin, Evans and J D Sports
- In terms of catchment spend per outlet, comparing Bargoed against similar centres and other Rural Centres reveals strong potential across a range of sectors, including Leisure Goods, House & Home, Durable Goods and Convenience
- Occupier suitability analysis has produced 40 Very Strong or Strong comparison goods retailer matches to the opportunity at Bargoed, including retailers such as Ethel Austin, Mk One, New Look and TKMaxx
- Overall, Bargoed offers clear opportunities for improving Mid and Lower Mid market retailer provision. The broad range of non-fashion categories across which Bargoed is under-served relative to similar centres suggests that a Mixed Goods retailer could trade particularly successfully

Bargoed Shopper Attitude Surveys

C.30 **Main findings of the Telephone Survey for Bargoed:**

- Respondents living in the Bargoed area visited a large number of different stores to complete their main food shop. In the previous survey in 2003, the greatest number of respondents had chosen Merthyr Tydfil as the location for food shopping, mostly so to the Asda store at Dowlais. In 2006

Blackwood was the most popular town centre that respondents visited for food and grocery items.

- In 2006, over a quarter of respondents (28.8%) listed Asda, Blackwood Town Centre as the store where they buy most of their household food and grocery items. Asda, Dowlais, Merthyr Tydfil was second and was listed by just over a quarter (26%) of respondents, with just over a fifth (21.2%) of respondents stating Tesco, New Road, Ystrad Mynach, the third most popular location.
- Only 2 respondents (0.8%) stated that they used a store in Bargoed for their household's food and grocery shopping (citing the Spar store), the Kwik Save store having ceased trading.
- The 2003 results showed that the highest proportion of respondents shop in Cardiff for non-food goods (37.2%). In 2006 the most popular town for non-food shopping was still Cardiff, but with fewer respondents stating this (25.6%).
- In 2006, only nineteen respondents (7.6%) indicated that they visit Bargoed for most of their non-bulky non-food items. This figure is a marked reduction in the number of people who visited Bargoed for this type of shopping in previous surveys, (for example in 2003 it was 12%).
- Respondents in the Bargoed catchment area identified a large number of stores, which they visited to purchase most of their bulky non-food items. There was no single store that stood out as being most popular with respondents, as only a tenth (10.4%) visit B&Q, Gallagher, in Caerphilly, which was the most visited. This figure was a decrease from 12.4% in 2003.

C.31 **Main findings of the On-Street Survey for Bargoed:**

- Continuing the trend from the previous surveys that were undertaken, the most popular main reason for respondent's visits to Bargoed town centre was for food and grocery shopping (35%). Non-food shopping was the second largest response, with a quarter of all respondents (25%) stating this as the main purpose of their visit.
- The majority of respondents (61%) stated that they had spent, or were likely to spend, between £0 – £20 during their visit. Around a third (34%) said that they would be spending/had spent less than ten pounds, with a further quarter (27%) stating somewhere between £11 - £20.
- Bargoed's location and convenience was the aspect that respondents most liked about the town centre (36%). A tenth (10%) were impressed with the convenient parking in Bargoed town centre.
- A "better range of shops needed" (25%) was the most popular response given by on-street interviewees when asked what one thing they particularly disliked about Bargoed. A lack of supermarkets was also a common theme, as a fifth of all respondents (20%) stated that there was "not enough supermarkets".

Risca / Pontymister

C.32 The town of Risca / Pontymister is located in the south east of the County Borough area with the River Ebbw and the Crumlin arm of the Monmouthshire and Brecon

Canal flowing through the town. The town is in close proximity to the A467 and is within easy access of Newport. It is the fourth largest town in the Borough. The Risca / Pontymister catchment area includes the wards of Risca East, Risca West and Crosskeys and has a combined population of approximately 14,500.

C.33 **Main findings of the Telephone Survey for Risca / Pontymister:**

- Nearly three fifths (58.4%), of respondents from the Risca Pontymister catchment area listed Morrisons, Rogerstone as the store where they buy most of their household food and grocery items. Asda, Duffryn, Newport was second, listed by just under a seventh (13.6%) of respondents, while Lidl, Risca Pontymister is the third most popular location with 9.2%.
- With regards to the respondent trip frequencies, travelling habits and expenditure, two thirds (65.2%) of respondents normally shop at their main food store once a week, with the vast majority of respondents (95.2%) travelling from home to their main food store, and almost three fifths (56.6%) travelling by car/van as the driver. Just over a fifth (20.8%) of all respondents spend in the region of £51 - £75 on their main food and grocery shopping, compared with only 16.4% who spend £30 or less.
- The results show that the most used single store for top-up shopping was Lidl, Risca Pontymister (listed by 14.4% of respondents), but unspecified local stores in Risca made up the most quoted answer (27.2% of respondents). In addition, almost 68% of respondents used one store or other within the catchment.
- The most popular place for non-bulky non-food items was Newport (listed by 62.4% of respondents), and the next most visited was Cardiff totalling just under a sixth (15.2%) of all respondents. Risca Pontymister was chosen by 4.8% of respondents for non-bulky non-food shopping, behind those choosing Cwmbran (5.6%).
- Newport is the most popular destination for bulky non-food items amongst respondents from the Risca Pontymister catchment area. Over half of those who buy bulky non-food items (51.2%) choosing to shop in Newport. Cardiff was the second location of choice with just over a tenth (11.2%) of respondents stating this.
- The most popular leisure activity among respondents from the Risca Pontymister catchment area, was either visiting a café or a restaurant (52.8%). When asked the location chosen, around a third said they visited Newport (36.4%), most commonly once a week (32.6%). Other respondents stated that they go to a pub or a bar in the Risca Pontymister area, (48%). The majority of respondents who participate in this type of activity do so in Risca Pontymister once a week. Almost two fifths (37.2%) visit a sports/leisure centre or gym and over a third (35.6%) play Bingo. Slightly more than a quarter of all respondents (27.2%) visit the cinema.
- Of those respondents who go walking from the Risca Pontymister catchment area, over half (54.8%) go walking in Risca Pontymister itself. Under a tenth of respondents (8.7%) set off to Cwmcarn, while Crosskeys is visited by 6.3%.
- Some 216 respondents (86.4%) travelled by car/van for shopping were asked how often they have access to the vehicle. Over four fifths stated that they have access to a car/van all the time.
- Over four fifths (83.6%) of respondents from the Risca Pontymister catchment area visit the Risca Pontymister centre for shopping in general.

Almost three fifths of the respondents (58.9%) stated it was because it was close and/or convenient to home and almost a fifth (18.7%) said they go there to visit a particular shop. Among those people that don't visit Risca Pontymister, the centre is considered to have a poor range of shops (34.1%), to be inconvenient (14.6%), and have poor access/parking (12.2%).

- The highest proportion of respondents, over a fifth (21.2%), stated that there were *"no improvements needed"* in Risca Pontymister that would make them use the centre more frequently. However, nearly a fifth (19.2%) of respondents who would prefer to have a better choice/range of non-food shops within the centre, and over an eighth of respondents (12.8%) would prefer to have a better choice/range of food shops.
- Over half of all respondents (52.8%) rated Risca Pontymister as either most or fairly favourable as a shopping centre. However, this figure has been in decline since 1994.

C.34 **Main findings of the On-Street Survey for Risca / Pontymister:**

- Almost half of all respondents (47%) who were in Risca Pontymister go food and grocery shopping, with over an eighth (13%) in town for non-food shopping and the same percentage visiting to use financial services.
- Most respondents had come from within the Risca Pontymister catchment (78%). Just under half (47%) of them had walked to the centre. Those travelling by car/van as driver, the second most popular mode of transport, accounted for 30% of respondents and slightly under a fifth (17%) had travelled by bus/coach. Those 53 respondents travelling by car were most likely to use on-street car parking (70%) or the Lidl free car park (15%).
- Three quarters (75%) of all respondents had travelled for a period of up to 10 minutes to arrive in Risca Pontymister. Two fifths (41%) of all respondents visit the town centre on a daily basis and around the same figure visit two or three times a week.
- Over two thirds (68%) of visitors to Risca Pontymister town centre had spent, or were expect to spend, up to £20. However, only 17% had spent, or were expecting to spend, over £20.
- Respondents like the location / convenience of Risca Pontymister (53%), the choice of shops (7%) and the choice and quality of places to eat and drink (6%).
- Respondents dislike the design / the unattractive environment of the centre (16%), the difficulty in finding parking places (11%), think that the streets need to be cleaner / tidied up (10%), or dislike the choice and quality of places to eat / drink (9%).

Ystrad Mynach

C.35 Ystrad Mynach is located centrally within Caerphilly County Borough and is the second smallest of the six retail centres in the Borough. The Ystrad Mynach catchment area includes the town itself, Penpedairheol, Tiryberth, Gelligaer, Hengoed, Nelson, and Maesycwmmer and this area has a population of approximately 23,000. The town has a good rail link to Cardiff and is located within easy access of both the A469 and the A472. The town is now the location of a large college, a hospital and the Council's HQ offices.

C.36 **Main findings of the Household Telephone Survey for Ystrad Mynach:**

- Tesco in Ystrad Mynach is the most popular choice of store for main food shop, being used by just over three fifths (62%) of respondents from within the Ystrad Mynach catchment area. The other stores chosen were Asda in Blackwood town centre (11.2% of respondents), Asda on Pontygwyndy Road in Caerphilly (10.4%) and a small number of respondents who used Somerfield in Tir y Berth.
- Analysing the chosen locations by main town, it is Ystrad Mynach (63.2%) which continues to dominate as the first choice for main food shopping, and it is at its most popular level since the surveys began. The next most popular locations of choice were Caerphilly (14%) and Blackwood (12%).
- These figures show that Tesco in Ystrad Mynach (22.9%) is the store most frequently used for top up shopping by those living in the Ystrad Mynach catchment area. The next most popular choices were local stores in Ystrad Mynach (7.3%), in Hengoed (6.7%), in Penpedairheol (6.1%), and in Cefn Hengoed (5.6%).
- The fact that shoppers choose to carry out both their main food and top-up food shopping at Tesco on New Road in Ystrad Mynach indicates the popularity of this store.
- When shopping for non-bulky non-food goods over 50% of respondents from the Ystrad Mynach catchment area had consistently chosen Cardiff in previous surveys between 1994 and 2003. However, the 2006 results show that this proportion has declined by 17.5 percentage points to 34.8%.
- Behind the most popular destination of Cardiff for non-bulky non-food items, other respondents from the catchment area chose Blackwood (22.4%) and Caerphilly (10%). The number of respondents purchasing non-bulky non-food items in Ystrad Mynach has increased significantly (to 8%).
- When asked what alternative centres they used for non-bulky non-food shopping, nearly a quarter of respondents (22.5%) said they do not visit any other centre. Around an eighth of respondents (12.6%) stated that they would use Blackwood Town Centre as an alternative and a similar percentage (12.1%) said they would choose Caerphilly Town Centre, with Cardiff City Centre chosen by a further 11%.
- It is apparent that Caerphilly remains the leading destination to shop for bulky non-food items within the Ystrad Mynach catchment area with over a quarter of respondents who buy bulky non-food items (27.2%) choosing to shop there. Ystrad Mynach was the third location of choice as a place for shopping for these items and there has been a small increase in the percentage of people visiting, from 4.6% in 2003 to 6% in 2006.
- There were no areas/stores that stood out as being overwhelmingly popular with respondents for shopping for bulky non-food items. However, just over a seventh (14.4%) visit B&Q at Gallagher Retail Park, Caerphilly. The next most popular area given was Cardiff City Centre, named by 4% of respondents.
- Visiting cafes/restaurants was the most popular leisure activity that respondents from the Ystrad Mynach catchment area participated in, with over half (52.8%) of all respondents doing so. Slightly more than two fifths (43.2%) go to pubs and bars, while around a third of respondents visit each of the following; a cinema, a sports/leisure centre, and the theatre or other

cultural events. Very few people (3.6%) visit nightclubs and well under a fifth participate in organised sport (16.8%).

- Of those respondents who go walking in the countryside and live within the Ystrad Mynach catchment area, around a quarter (24.1%) go walking along the routes in Ystrad Mynach and around a tenth (11.2%) set off to the Brecon Beacons. Slightly fewer visit Hengoed (7.8%) and roughly the same numbers choose to walk in either Maesycwmmer or Penallta in Hengoed (both 6.9% of all respondents). A small number go to the walking paths in Caerphilly (4.3%).
- Nearly half of the respondents (48.7%) who indicated that they visit Ystrad Mynach for shopping stated it was because it was close and/or convenient to home and over a quarter (25.6%) said they go to Ystrad Mynach to visit a particular shop.
- Of those respondents who indicated they did not visit Ystrad Mynach for shopping, a quarter (25.5%) gave 'Poor choice of all shops' as the reason, and another sixth (16.4%) stated 'Poor choice of non-food shops'. Slightly more than an eighth (12.7%) of respondents thought that Ystrad Mynach was inconvenient for them and the same number thought that it had 'Poor access and parking'.
- Just under a fifth (18.8%) of all respondents would use Ystrad Mynach more frequently if there was a better choice/range of non-food shops and slightly over a tenth (10.8%) would if it had a better choice/range of food shops.
- Around half (54%) of all respondents rated Ystrad Mynach as either fairly, or very favourable, as a place for shopping. This is a slight decline from the equivalent figure from 2003 (57.4%), although it is an improvement on the 2000 figure (49%).

C.37 **Main findings of the On-Street Survey for Ystrad Mynach:**

- Around two fifths of all respondents (38%) were in Ystrad Mynach to go food and grocery shopping. A further fifth (19%) were in town for non-food shopping, with around an eighth (13%) visiting for work or business purposes. Just under a sixth (16%) were in town for health and financial services.
- The majority of respondents (95%) had gone straight from home to Ystrad Mynach, with the remainder doing so from work (5%). Just over half came from Ystrad Mynach itself (56%), with Hengoed (14%), Cefn Hengoed (9%) and Maesycwmmer (7%) being the other starting locations of note.
- The most popular means of travel was on foot, as over two fifths (42%) of respondents had walked to Ystrad Mynach. Those travelling by car/van as a driver, accounted for a similar amount (39%), and slightly over a tenth (11%) had travelled using a bus/coach. Slightly fewer people are travelling by foot to Ystrad Mynach than in 2003, when the equivalent figure was just under half (49%). However, those travelling by car/van as a driver have increased markedly (2003 – 27%, 2006 – 39%).
- The frequency of visits to Ystrad Mynach town centre has changed from those trends evident when the 2003 survey was conducted. Half of all respondents (50%) stated that they visit Ystrad on a daily basis, an increase from the 2003 survey, when just over a third of respondents (35%) admitted to doing so.

- In terms of spending behaviour, over half of all respondents (53%) had spent or were expecting to spend up to £10 whilst on their shopping trip, with just under a fifth (17%) estimating to spend between £11 and £20. A further fifth (21%) were not expecting to spend anything during their visit. Under a tenth (9%) of all respondents had spent or were expecting to spend over £20 on their trip, with very few people expecting to spend large amounts of money.
- Ystrad Mynach's location and convenience was the aspect that the overwhelming majority of visitors most liked about the town centre (74%). A small number particularly liked the following aspects about Ystrad Mynach: the range of shops (6%) and the choice and quality of places to eat/drink (3%). Very few people (5%) were unable to specify anything that they liked.
- A quarter of all respondents (25%) couldn't state anything that they particularly disliked about Ystrad Mynach. However, another quarter (27%) of respondents stated it was difficult to find parking in the town centre. Around a tenth (9%) disliked the centre's design or found Ystrad Mynach to have an unattractive environment. A small number of respondents (5%) thought that there was too much through traffic / congestion / buses, and the same percentage thought that a better range of shops is generally needed.

Newbridge

C.38 Newbridge is situated in the east of the County Borough on the River Ebbw. There are five retail centres larger than this one in the Borough and it is considered that the town's function is too limited to be one of the Principal Towns identified in the LDP Preferred Strategy. Nevertheless, Newbridge is significantly larger than the next biggest retail centres and survey information was collected for it in common with the five largest centres. This is included below for completeness.

C.39 For the purposes of this survey the Newbridge catchment includes the town itself, Crumlin and Abercarn, which has a combined population of approximately 16,500 people. The town is in close proximity to the A472 and the A467 and it has good road network links to the rest of the Borough. The campaign to restore the Celynen Collieries Workmens Institute, built in 1898, and the adjoining 1920's Memorial Hall (The Memo) have indicated this. Substantial investment has occurred to renovate shop fronts in the past ten years and this has helped to keep a low vacancy rate and high approval levels within the town.

C.40 **Main findings of the Household Telephone Survey for Newbridge:**

- Respondents living in the Newbridge catchment area specified a large number of different stores that they visited to purchase their food and grocery items. Previous surveys have shown a pattern of declining numbers of respondents from the Newbridge catchment area who shop for food within the area. Custom has decreased from 28.6% in 1994 to only 9.2% in 2006, with more being attracted to the Blackwood area.
- The 2006 survey results have revealed that the number of residents from the Newbridge catchment area shopping for food and grocery items declined in most of the major centres compared with 2003. The only exception was Ystrad Mynach which experienced a slight increase in

custom. There was an increase in visits to a large number of alternative centres instead (23.2%).

- In 2006 nearly two fifths of respondents visited Asda, Blackwood to buy most of their household food and grocery items. The second most popular choice was Morrisons, Rogerstone, listed by just under a sixth (16.4%) of respondents. Under a tenth (8.8%) of respondents chose Somerfield, Newbridge which was the third most popular location. The fourth most cited store was Tesco, Ystrad Mynach (6% of respondents), with Sainsburys, Cwmbran fifth (4%) and Asda, Newport sixth (2.8%).
- In 2003 the highest proportion of respondents chose Newport for non-bulky non-food goods (44.8%). That survey also showed that Blackwood and Cardiff were the other two relatively important locations visited to buy these types of goods, and that these three main areas together accounted for the bulk of visits by respondents from the Newbridge catchment area.
- The 2006 results show that respondents from the Newbridge catchment area shopping for non-bulky non-food goods purchases showed a marked preference to visit three foremost locations almost equally. Shops in the Newport area accounted for 22.8% while Blackwood and Cwmbran attracted 21.6 and 21.2% of respondents respectively. The next most visited place for non-bulky non-food items was Cardiff totalling just under one eighth (12%) of respondents.
- In terms of visits to specific town centres for non-bulky non-food purchases, Newport Town Centre was the most chosen location (listed by 21.2%), Cwmbran Town Centre was second (listed by 20.8%) and Blackwood Town Centre was third (listed by 18.8%).
- For respondents from within the Newbridge catchment area Newport has historically been the leading destination to shop for bulky non-food items. In 2006 nearly a fifth of respondents (18.8%) chose to shop there. However, this figure represented a major reduction from that in earlier surveys.
- Cardiff was the second location of choice to shop for these items in 2006, with a tenth of respondents stating so, a proportion that has remained fairly constant throughout the surveys.
- Overall as a choice of town for bulky non-food shopping, Newport still remains the most popular place compared with Cardiff, Cwmbran and Newbridge.
- The survey found that very nearly four fifths (79.6%) visit Newbridge for shopping. Those 199 respondents who indicated they visited Newbridge stated a number of reasons for visiting their local area for shopping. Almost half of the respondents (47.2%) stated it was because it was close and/or convenient to home and over a seventh (14.6%) said they go to Newbridge to visit a particular shop.
- Similarly those 51 respondents who indicated they did not visit Newbridge, were also asked their reasons for not doing so. Nearly a seventh (13.7%) of respondents stated that it was due to poor access and parking and over a tenth (11.8%) stated it was because it was inconvenient.
- While a third of respondents saw no need for improvements, nearly a quarter (23.2%) would prefer to have improved parking facilities within their local area for shopping. Over a fifth of respondents stated they would

prefer to have better choice/range of non-food and food shops (overall 18.4%; 6.8% and 11.6 respectively).

C.41 **Main findings of the On-Street Survey for Newbridge:**

- The most popular reason for visiting Newbridge town centre was to for food and grocery shopping, as nearly half (46%) of all respondents were in town for this reason. In a change from the previous survey, non-food shopping was the second highest reason for going to Newbridge, with around a fifth of respondents (21%) visiting for this reason and those using services accounted for 14% of all respondents. In the previous survey in 2003, accessing services had been the second most frequently stated reason for visiting Newbridge (27% of all respondents) and non-food shopping the third (19%).
- The majority of respondents (97%) had gone straight from their home to Newbridge, with the remainder doing so from work (2%) and one respondent coming from another shopping area (1%).
- The most popular method of transport used to travel to Newbridge was by bus/coach, which was used by slightly over a third of all respondents (37%). This figure is a significant increase from the previous surveys and suggests that more people are using public transport.
- Respondents travelling to Newbridge by car chose to park in a public car park (47%) and on-street (46%) on a roughly equal basis.
- The travel time pattern in 2006 for those visiting Newbridge was fairly similar to the trends in the 1997 and 2000 surveys. That is, at least half of all those interviewed (53%) had travelled for a period of between 5 and 10 minutes to get to Newbridge.
- Over two fifths (45%) of all respondents visit Newbridge town centre on a daily basis. This figure has increased slightly from the previous survey (2003 - 39%). Those visiting 2 times per week or more frequently accounted for nearly four fifths of all respondents (78%).
- Over half of all respondents (52%) stated that they had spent or were likely to spend between £1 and £10 during their visit in Newbridge. Around a fifth (21%) of all respondents were spending between £11 and £20 and only 5% of people were intending to spend or had spent more than £80 during their visit.
- The majority of respondents (53%) stated that Newbridge's location and convenience was the one aspect that they most liked about the town centre. The second most popular aspect that respondents liked was the range of shops in the town, although only a tenth stated this (11%). The same percentage (11%) said that there was 'nothing in particular' that they liked about Newbridge.
- When asked what they particularly disliked about Newbridge the most popular response given by respondents was, somewhat positively, 'nothing in particular', which was given by over a third of all those interviewed.
- The highest single negative factor was the difficulty in finding parking, which was stated by 14.4% of all respondents.
- The design, cleanliness and layout of the centre put some people off, as 6% stated that they particularly disliked the centre design and unattractive environment, and the same percentage stated that they would like the streets to be cleaned up.

Vacancy Rates

Table 6 Vacancy Rates: Principal Centres and largest Local Centres

Retail Area	Convenience / Comparison	Service / Community	Total Occupied	Vacant	Grand Total	Vacancy Rate
Ystrad Mynach TC	40	40	80	3	83	3.6%
Caerphilly TC	106	105	211	16	227	7.0%
Blackwood TC	107	91	198	16	214	7.5%
Risca / Pontymister TC	43	55	98	15	113	13.3%
Bargoed TC	59	65	124	32	156	20.5%
SUB TOTAL	**355**	**356**	**711**	**82**	**793**	**10.3%**
Cefn Fforest	9	16	25	0	25	0.0%
Nelson	18	29	47	2	49	4.1%
Cwmfelinfach	7	14	21	1	22	4.5%
Pontllanfraith (all parts)	21	30	51	3	54	5.6%
Newbridge	34	34	68	5	73	6.8%
Pontlottyn	12	14	26	2	28	7.1%
Fleur de Lys	11	12	23	3	26	11.5%
Trethomas	9	13	22	3	25	12.0%
Bedwas	12	15	27	4	31	12.9%
Crumlin	9	13	22	4	26	15.4%
Senghenydd	8	7	15	3	18	16.7%
Llanbradach	8	14	22	5	27	18.5%
Crosskeys	6	15	21	5	26	19.2%
Rhymney	8	21	29	7	36	19.4%
Abertridwr	13	13	26	7	33	21.2%
New Tredegar	11	13	24	8	32	25.0%
Aberbargoed	12	13	25	9	34	26.5%
Cwmcarn	8	12	20	10	30	33.3%
SUB TOTAL	**216**	**298**	**514**	**81**	**595**	**13.6%**

Source: CCBC Surveys, 2006

C.42 The vacancy rates in Table 6 above give another measure of vitality of retail centres. It can be seen that the smaller centres on average have higher vacancy rates than the five largest centres. Some of them, such as Cwmcarn, Aberbargoed, New Tredegar and Abertridwr, have particularly high rates and their relative health is therefore a cause for concern, but Bargoed is also in that category.

Pedestrian Flows

C.43 Although pedestrian counts were undertaken in earlier shopper attitude surveys, over time the results from the newer survey data showed that the data was too volatile and unreliable to draw conclusions or identify trends. The counts are no longer carried out as part of the surveys.

C.44 A Pedestrian counting machine were installed in each of the Caerphilly, Blackwood, and Bargoed Town Centres during August 2006. Over the period September 2006 to August 2007 the following data was collected:

- In Caerphilly the weekly average was 44,617 movements. Apart from the pre Xmas rush and the January lull, the lowest and highest figures were 35,371 and 52,298 respectively.
- In Blackwood the weekly average was 41,231 movements. Apart from the pre Xmas rush and the January lull, the lowest and highest figures were 32,581 and 54,877 respectively.
- In Bargoed the weekly average was 14,400 movements. Apart from the pre Xmas rush and the January lull, the lowest and highest figures were 11,836 and 16,231 respectively. Bargoed's retail offer is not as attractive or extensive as Caerphilly's or Blackwood's, which explains the lower footfall, and the enhancement of this position should be a major aim of the LDP strategy.

Conclusions

C.45 The shopper attitude survey information and the CACI studies confirm a clear hierarchy of centres. Blackwood and Caerphilly are higher order centres with wider catchments, gaining from a higher level of comparison goods purchases, being less dependent on walk-in trade and probably benefiting from less frequent but higher spending visits. Ystrad Mynach, Risca / Pontymister and Newbridge exhibit features of more localised centres whilst Bargoed is somewhere between the two types.

C.46 Overall, there is a trend for shoppers to gravitate towards the bigger superstores and shopping centres, perhaps reflecting increasing car ownership and use. If people continue to be prepared to travel greater distances to shop, competition between shopping centres will increase.

C.47 These findings highlight priorities for the Council's strategy to encourage new retailing development in the County Borough, and for the policies and site allocations in the LDP. The evident success of the recent improvements to Caerphilly and Blackwood town centres is a pointer for the council's strategies to regenerate other centres in the County Borough.

SECTION D

D DEMAND AND PROVISION

D.1 Ministerial Interim Planning Policy Statement 02/2005 (para. 10.2.9) states that: *"Local Planning Authorities should consider through their development plans whether new sites should be identified in town, district, local or village centres for retail development, leisure development or other uses best located in centres***.***"*

D.2 In order to do this the Council must therefore make an assessment of the demand for, and the supply of, retailing provision in the County Borough. However, assessing the need for different types of retailing in the future is notoriously difficult, as it is reliant on a great many assumptions which in turn are based on data which is often open to question.

The Monitor and Manage Approach

D.3 Because of these predictive difficulties, in implementing its retail strategy, the Borough Council therefore will maintain a "**monitor and manage**" approach rather then the "predict and provide" approach, which relies solely on forecasts of future demand and supply.

D.4 The County Borough's "**monitor and manage**" approach will involve the following process:

1. Setting 'targets', including the proportions of the County Borough's population purchasing various types of goods within the County Borough as a whole and measurements of the vitality and viability of each of the principal town centres.
2. Making an initial, statistical assessment of the need for various forms of retailing, by reference to existing provision, future growth forecasts and the retail 'targets'.
3. Make allocations in the LDP sufficient to meet the calculated need.
4. Monitor shopping patterns in the County Borough at three to four yearly intervals, to check if targets are being achieved.
5. Review targets and repeat the cycle 1-4 above.

D.5 Using this method, it is anticipated that the danger of being overly prescriptive about what is becoming a fast evolving retailing scene can be avoided and that the all important flexibility can be maintained within this area of land use planning so that the LDP remains responsive to new pressures and opportunities.

D.6 The information and survey results provided in Sections B & C of this background paper have shown the County Borough's shopping centres to still be deficient in terms of quantity and quality of retail provision, especially in terms of comparison goods floorspace. Yet there have already been significant improvements to provision in recent years as new developments have been attracted. The next step is to seek to estimate future demand over the plan period and then seek to cater for a realistic amount of new provision.

Future Expenditure Growth

D.7 The expected population forecast of **177,500** up to a possible 180,500 residents in 2021, represents a change in population of over 7,000 people over the population for which retail provision was proposed in the UDP. Therefore, change in demand will result from an increased population base, as well as from increased spending by residents, and possibly from the borough's shopping centres retaining more of resident's retailing expenditure.

Retail Expenditure Forecasting

D.8 The forecasting projections employed in the assessment of future retail demand are taken from Map Info Information Brief 06/2. The Brief derives the estimates and price indices by goods type for the United Kingdom from Household final consumption expenditure (HHFCE) reported in the ONS Consumer Trends, (compatible with the ONS Blue Book), and from time series data supplied by the ONS. The Blue Book provides the most reliable source of information on consumer retail expenditure, since it draws upon a wide range of sources. The Blue Book compatible figures are used to calculate total consumer expenditure on those goods normally purchased through retail outlets. Consumer retail expenditure per capita is obtained by dividing the resulting expenditure by goods type by the latest ONS estimates of mid-year home population for the United Kingdom, as published in the ONS Population Trends.

Trends in Comparison Goods

D.9 Comparison goods have accounted for the majority of household spending, since 1994. (Comparison Goods include books, clothing, footwear, furniture, floor coverings, household textiles, audio-visual equipment, hardware, DIY supplies, Chemist's goods, jewellery, watches, clocks, bicycles, recreational and other miscellaneous durable goods). As household incomes have risen, annual growth rates have been much higher compared to convenience goods. Indeed average annual growth rates for comparison goods have been increasing rapidly over time, with the average growth in 1998-05 of 7.7%, more than double the average rate over a forty year period. Consequently, comparison goods represented almost two-thirds of all goods expenditure in 2005.

Trends in Convenience Goods

D.10 Growth in expenditure per capita on convenience goods has been much lower. (Convenience Goods include food, alcoholic and non-alcoholic drinks, tobacco, newspapers, magazines and other non durable household goods). Ultra-long run trend calculation (1964-2005) suggests that there is virtually no growth in this category. A clearer growth trend is visible looking at more recent data periods. Medium-term trend growth (from the mid 1980s) is 0.5% and a further jump in the trend calculation is visible for more short-run data, once the recession and period of higher inflation in the early 1990s is excluded. Average growth calculated since the mid-1990s is 0.9%.

D.11 The Map Info Information Brief contains two types of forecast:

- Trend Projections
  Projections of United Kingdom annual average retail expenditure per capita by goods type, including Special Forms of Trading and in constant 2003 prices, are based on time series analysis of past trends in expenditure per capita data from 1964, and are derived by fitting log-linear regression lines to the data using the method of least squares. These projections are

derived solely from past trends and take no account of current economics or future expectations.

Convenience goods retail expenditure has been erratic over the last 40 years, but the most statistically robust estimate of trend growth calculated is for the period 1998-2005, when the annual growth rate averaged 0.9%.

Trend growth rates of comparison goods expenditure per capita are statistically robust for all periods, with the strongest relationship noticeable in the short-term data. However, growth in this period is significantly stronger than in the longer run and appears to be unsustainable. Projected sales per capita based on medium and long-term trends look more believable.

- OEF Forecasts

  As an alternative to pure trend-based projections, the forecasts from the UK consumer spending model are consistent with past trends, but are also based upon expected changes in other economic variables of interest according to historic relationships. Short-term growth rates, particularly for comparison goods are clearly unsustainable and some correction is necessary to revert to levels dictated by medium and long-term trends.

  Overall, consumption is expected to be robust, but grow slightly below incomes in the near term. Relatively low and stable interest rates and rising employment and earnings should underpin a mild consumer recovery.

  Spending on comparison goods is anticipated to increase by 4.1% in 2006, with average annual growth rates increasing marginally over the forecast period. Convenience good expenditure is expected to be 0.6% in 2006, with average annual growth rates projected to increase in line with short run trends of 0.9% over time.

D.12 It is considered that, for different reasons, both the Ultra Long Term and the Short Term trend projections are unrepresentative of likely future expenditure patterns. The Ultra Long Term projection period includes years where the population was significantly less wealthy than now and therefore had a radically different household expenditure pattern, while in the Short Term projection period the recent spending boom has been fuelled by unsustainable above-average personal borrowing and a deflationary global manufacturing cost environment, both of which factors are unlikely to continue to operate forever.

D.13 Information Brief 06/2 describes the Medium Term trends as being most statistically robust and more realistic for both comparison and convenience goods. Therefore, for the purposes of modelling future demand for retail provision during the LDP period it is considered that the Medium Term trend projections should be employed in the calculations. These forecasts indicate that over the plan period there will be growth in all categories of retail expenditure, but it will be particularly substantial in comparison goods. The Map Info estimates employed in the projections contained in the Information Brief anticipate rises in UK retail expenditure between 2005 and 2020 of approximately 8% for convenience goods and 129% for comparison goods. The Council's calculations will use these figures as a basis to apply to the plan period of 2006 to 2021.

Future Demand and Provision

D.14 The Shopper Attitude Survey 2006 found that there is a high level of sufficiency in the County Borough for food shopping with 84% of residents doing their main food shopping within the boundary. Nevertheless, retail forecasts predict that if shopping patterns were to remain unchanged, our predicted **177,500** residents would be spending in the order of up to **£48 million** (2003 prices) on food purchases in stores outside the County Borough every year by 2021. See Table 7 below.

Table 7 Calculation of expenditure leakage beyond the CB area by 2021

Resident expenditure outside the CB from the 2006 Survey		Value, Millions
Convenience Goods	177,500 x 16% x £1686.64*	**£47.90 m**
Comparison Goods	177,500 x 69% x £6535.81*	**£800.47 m**

* from Map Info information brief 6/02, medium term trends; created for 2021 from 2020 figures; at 2003 prices

D.15 However, even more significantly, the shopper survey has once again shown that there is a massive outflow of expenditure on comparison goods, such as clothing and footwear, and furniture and carpets. The survey found that only 30% of residents shop at centres within the boundary for non-bulky comparison goods and only 31% for bulky comparison goods. Again, if shopping patterns where to remain unchanged, our residents would be spending in the order of **£800 million** (2003 prices) on comparison goods purchases in stores outside the County Borough every year by 2021. See Table 7 above.

Table 8 Target % Resident Expenditure to be retained in CB retail centres

Resident expenditure in the CB	Actual from 2006 Survey	Target by 2021
Convenience Goods	84%	90%
Non Bulky Comparison Goods	30%	40%
Bulky Comparison Goods	31%	40%

Source: CCBC Shopper Attitude Survey 2006

D.16 Table 8 above illustrates the shopper attitude survey results in 2006 for the percentage of residents who made their main shopping visits to retail centres within the County Borough, by goods category. The targets for the end of the plan period in 2021 have been chosen by the Council with the aim to retain more of residents' retailing expenditure within the County Borough. Thus, the Council's targets assume that an additional 6% of residents' food expenditure, an additional 10% of residents' non-bulky comparison expenditure, and an additional 9% of residents' bulky comparison expenditure will be retained by 2021. These targets are applied in the relevant demand and provision sections below appearing in Tables 11, 14 and 17.

The Demand / Supply Projections

D.17 This section contains the future demand and supply calculations for convenience goods, non-bulky comparison goods and for bulky comparison goods. The origin of every external figure in the following tables is explained by the footnotes below them. However, as already stated, these projections are only best estimates

because they are dependent on many assumptions. Chief among these is the difficulty in estimating future floorspace turnover figures.

National expenditure figures

D.18 National average figures have been applied, both in terms of retail expenditure growth (Map Info), and in terms of turnover figures from each firm where published. Thus, there is no allowance made for lower earnings in the County Borough relative to the national average; nor to what extent expenditure growth or turnover figures might also be lower as a result. There is also difficulty in estimating turnover figures for the County Borough's relatively small retail centres, because they contain a relatively low incidence of national multiple operators. This is a much larger problem for the comparison goods projections than for the convenience goods projections because of the greater number of different retailing firms in that sector.

Floorspace figures

D.19 The gross floorspace figures for retail units in the Principal Town Centres of Bargoed, Blackwood and Caerphilly are from Experian Goad and therefore can be considered to be accurate. The Council's net floorspace figures for the small retail units in Ystrad Mynach and Risca/Pontymister may be less accurate and this is also true of the retail units in the local centres (such as those listed in Table 2). Nevertheless, those figures are considered to be adequate for the global forecasting purpose.

D.20 In order to use net floorspace figures throughout in the retail calculations any gross floorspace figures for Convenience and Non Bulky Comparison Goods sales areas have generally been reduced to 70% to approximate to an equivalent net floorspace value. Because retail warehouse units are a different design type of store, the gross floorspace figures for Bulky Goods sales areas have been reduced to 90% to create such a net value. Where they are known the actual net floorspace figures are employed.

Diversion to Internet Shopping

D.21 A further concern is the extent to which internet purchases will replace traditional street shopping by the end of the plan period. At present in the UK as a whole it is estimated that only 5% of Socio-Economic Groups A and B regularly undertake their main food shop online. Obviously this figure is going to even be smaller for the population as a whole. Therefore in the demand calculation below it has been assumed that, of those who shop in the County Borough for food, the percentage of shopping diverted to the internet will be 10% by 2021. This may well represent a quadrupling of the present level locally.

D.22 Internet purchases amongst comparison goods has been much more dramatic in certain sectors with Books, Music and Electrical Goods being particularly popular areas for shopping diversion. A recent assessment by U-Switch assumes that nationally, internet purchases will rise from 10% of all retail goods at present to a massive 40% by 2020, which it could be argued is rather an excessive forecast. Because this estimate includes the food category as well, it implies that the diversion of comparison goods will be even higher.

D.23 In the County Borough, it is considered that the percentage of online purchases of comparison goods will be lower that any national forecast, because of lower income levels. Furthermore, some diversion of trade onto the internet is considered more likely to be substitution for those shopping journeys to the centres of Cardiff and Newport than for local shopping trips inside the County

Borough. However, to be cautious, it is assumed that the diversion to internet in the County Borough area by 2021 for non-bulky comparison goods will reach 25% while it may be as much as 50% for bulky comparison goods. Table 9 below summarises the Council's assumed percentage diversion of trade to the internet shopping mode by 2021, by each retail sector.

Table 9 Diversion of trade to Internet Shopping

Resident expenditure in the CB	Forecast Diversion to Internet Sites by 2021
Convenience Goods	10%
Non Bulky Comparison Goods	25%
Bulky Comparison Goods	50%

Source: CCBC forecasts

Visitor Expenditure level

D.24 The Council's triennial Shopper Attitude Surveys gather information on shopper behaviour and also identify visitors to our main town centres. See Table 10 below for the actual figures by centre. In 2006 the proportion of visitors in relation to residents across the six largest centres was just over 9%.

Table 10 Visitors to the six largest centres

Centre	Total number of interviews	Visitors to the CB	%
Bargoed	150	9	6.00%
Blackwood	201	22	10.95%
Caerphilly	201	30	14.93%
Newbridge	153	16	10.46%
Risca/Pontymister	150	9	6.00%
Ystrad Mynach	151	5	3.31%
Total	1006	91	9.05%

Source: CCBC Shopper Attitude Survey 2006, Street Interviews

D.25 This visitor average has been modified when utilised within the retail demand and supply calculations below. This is because it is considered unreasonable to ascribe main food shopping or significant comparison goods purchases as the function of all these visitor journeys. Some may be visiting our main centres as tourists or were here just to access a particular service. On the other hand some people who work in the County Borough but reside outside it may do their main food shop on the way home and it is important to include them in calculations. Similarly there will be some comparison purchases made within the County Borough by visitors but it would be unreasonable to expect these purchases to be as extensive as those made by residents.

D.26 Therefore to strike a balance between possible over-estimation and under-estimation it has been assumed that only half the visitors are undertaking their main food shop and that our visitors are making comparison purchases three times less than do the residents.

CONVENIENCE GOODS DEMAND AND PROVISION

Table 11 Convenience Goods Demand in 2021

A	Population of County Borough in 2021 at target figure		177,500
B	UK Exp. / £ capita in 2006 at 2005 prices	2003 x 1.017	£1,589
C	UK Exp. / £ capita in 2021 est. from 2020, at 2005 prices	x1.017x1562/1554	£1,715
D	Estimated % of food shopping in store versus online in 2021		90%
E	Target percentage of population to do food shop inside CB		90%
F	**Residential Convenience Exp. in shops, 2021, target pop**	A x C x D x E	**£246.62 m**
G	Shoppers visiting the CB area as % of target pop local spend	9.05% x 90% x A	14,457
H	Est. Visitor Conv. Exp. 2021, target pop local spend x half	G x C x 50%	**£12.40 m**
J	**Total Convenience Exp. in shops, 2021, target pop**	F + H	**£259.02 m**

A The population forecast range, LDP background paper, Population and Housing
B From Map Info information brief 6/02, the 2003 prices adjusted to 2005
C Based on projection of 2005 - 2020 figs, medium term trends, MapInfo information brief 6/02, the 2003 prices adjusted to 2005
D See Paragraph D.21 & Table 9
E See Table 8
G See Table 10
H See Paragraph D.26

Table 12 Existing Convenience Goods Floorspace Turnover

J	**Total Convenience Expenditure in shops, 2021, target pop**	Table 11	**£259.02 m**

K1	Total Net Floorspace of Major Food Superstores (> 3000 sq.m)		11,300 sq.m
K2	Average Est. Turnover £ / sq. m at 2006 for large stores		£12,640
K3	**Sub Total Estimated Turnover**	G1 x G2	**£142.83 m**
L1	Total Net Floorspace of Medium Food Stores (300 – 3000 sq.m)		10,625 sq.m
L2	Average Est. Turnover £ / sq. m at 2006 for medium stores		£3,680
L3	**Sub Total Estimated Turnover**	H1 x H2	**£39.10 m**
M1	Total Net Floorspace of Small Convenience Stores (< 300 sq.m)		5,460 sq.m
M2	Average Est. Turnover £ / sq. m at 2006 for small stores		£3,000
M3	**Sub Total Estimated Turnover**	J1 x J2	**£16.38 m**
N	**Total Estimated Existing Turnover**	G3 + H3 + J3	**£198.31 m**
P	**Unsatisfied Target Demand in 2021**	J - N	**£60.71 m**

K1, L1, M1 Floorspace figures of particular stores reduced by extent of non-convenience goods areas
K2, L2, M2 National retailer turnovers from Verdict Report on Grocery Retailers 2007, 2006 prices

Allocations for Food Store Sites

D.27 The objective in allocating new sites for additional food store provision is not just to increase the percentage of residents shopping for food within the County Borough. The aim is also to sustain and enhance the vitality and viability of these town centres; to facilitate competition from which all consumers are able to benefit and maximise the use of transport other than the car; to ensure availability of a wide range of shops, employment, services and facilities; and to maintain an efficient, competitive and innovative retail sector.

D.28 In view of the repetitive and bulky nature of food purchases, the Council's target to increase local sales to 90% is considered to be both achievable, and desirable from the standpoint of sustainability. However, food superstores have already been built in three of the five Principal Town Centres so sites are only proposed in the remaining two centres, Bargoed and Risca / Pontymister, in order to maintain and enhance their viability and vitality. The development of these stores will

ensure that residents will have more modern food retail facilities closer to home. There are also four smaller food store proposals. The Rhymney retail centre would benefit from a small food store because of the extremely low provision in the town at present. The Penallta site is intended to supply a neighbourhood store to serve approximately 590 new residential units. The former Palace Cinema site is also intended to provide local provision for top up convenience purchases within Risca / Pontymister town centre. Part of the Cardiff Road redevelopment in Caerphilly is also currently earmarked for a food store.

Table 13 Demand / Supply for Convenience Goods

DEMAND SIDE

P	Unsatisfied Target Demand in 2021, target pop	Table 12	**£60.71 m**

SUPPLY SIDE: COMMITMENTS & PROPOSALS

1.1	The Lawn, Rhymney, gross area		1,500 sq.m
1.2	Store Net Floorspace Figure x 70%		1,050 sq.m
1.3	Net Convenience Floorspace Figure assuming 80%		840 sq.m
1.4	Estimated Turnover £ / sq. m at 2006 prices		£3,000
1.5	**Estimated Store Turnover**		**£2.52 m**
2.1	Bargoed Retail Plateau for food superstore, gross area		5,500 sq.m
2.2	Store Net Floorspace Figure x 70%		3,850 sq.m
2.3	Net Convenience Floorspace Figure assuming 70%		2,695 sq.m
2.4	Estimated Turnover £ / sq. m at 2006 prices		£9,500
2.5	**Estimated Store Turnover**		**£16.64 m**
3.1	Penallta, Ystrad Mynach, gross area		500 sq.m
3.2	Store Net Floorspace Figure x 70%		350 sq.m
3.3	Net Convenience Floorspace Figure assuming 90%		315 sq.m
3.4	Estimated Turnover £ / sq. m at 2006 prices		£3,000
3.5	**Estimated Store Turnover**		**£0.95 m**
4.1	Former Cinema, Risca, gross area		535 sq.m
4.2	Store Net Floorspace Figure x 70%		375 sq.m
4.3	Net Convenience Floorspace Figure assuming 90%		337 sq.m
4.4	Estimated Turnover £ / sq. m at 2006 prices		£5,000
4.5	**Estimated Store Turnover**		**£1.69 m**
5.1	Pontymister Foundry Site, gross area		10,238 sq.m
5.2	Net Convenience Floorspace Figure, actual from Tesco		3,344 sq.m
5.3	Estimated Turnover £ / sq. m at 2006 prices		£13,000
5.4	**Estimated Store Turnover**		£28.3 m
5.5	**Assume 20% of turnover spent by Newport residents#**		**£22.61 m**
6.1	Cardiff Road, Caerphilly, gross area		2,240 sq.m
6.2	Store Net Floorspace Figure x 70%		1,568 sq.m
6.3	Net Convenience Floorspace Figure assuming 90%		1,411 sq.m
6.4	Estimated Turnover £ / sq. m at 2006 prices		£10,500
6.5	**Estimated Store Turnover**		**£14.82 m**
7	**Total Estimated Turnover of Food Retail Sites**	6 sites	**£59.21 m**
8	**Remaining Unsatisfied Demand 2021**	P - 7	**£1.50 m**
9	**Total Supply relative to Unsatisfied Demand 2021**	7 / T	**97.5%**

Floorspace figures of particular stores reduced by extent of non-convenience goods areas
Retailer turnovers are CCBC estimates based on review of national retail impact studies, 2006 prices
Assumption of extended catchment from Risca Tesco RIA, 2008

D.29 Thus, while remembering the caveats already discussed about the accuracy of long term retail expenditure forecasts, the projection shows that there will be a reasonably good match between demand and supply for convenience goods retailing. However, as already discussed it will be the Council's intention to closely monitor retail development and changing shopper behaviour patterns to ensure the Plan remains fit for purpose and neither grossly over-allocates nor under-provides through the plan period.

NON-BULKY COMPARISON GOODS DEMAND AND PROVISION

D.30 The calculations below for the Non-Bulky and Bulky Comparison Goods forecasts utilise a forecast assessment of how the total comparison goods expenditure splits between the two sectors. Studies across the nation in the past tended to assume a split of 67% to 33% for Non-Bulky to Bulky Comparison Goods. Because expenditure is expected to increase faster for Bulky Comparison Goods than for Non-Bulky Goods the split is forecast to be 60% against 40% respectively by 2021. These latter figures are employed in the Demand forecasts below.

D.31 Non-Bulky Comparison Goods are normally those purchases which are made in the town centre "High Streets", like shoes and clothing for example. Examples of Bulky Comparison Goods normally include DIY products, furniture, carpets & floor coverings, electrical & gas products, and motor vehicle accessories and cycles.

Table 14 Non-Bulky Comparison Goods Target Demand

A	Population of County Borough in 2021 at target figure		177,500
B	UK Comparison Expenditure / £ capita in 2006 at 2005 prices	2003 x 0.949	£2,768
C	UK Exp. / £ capita in 2021, est. from 2020, at 2005 prices		£6,202
D	Non bulky exp. estimated as % of total comparison exp.		60%
E	Estimated % of non bulky shopping in store v. online in 2021		75%
F	Target percentage of population to shop inside CB		40%
G	**Resident Non Bulky Comparison Exp. 2021, target pop**	A x C x D x E x F	**£197.17 m**
H	Shoppers visiting the CB area as % of target pop local spend	9.05%x60%x40%xA	3,855
J	Est. Visitor Non Bulky Exp. 2021, target pop local spend, x 1/3	C x D x H x 33%	**£4.78 m**
K	**Total Non Bulky Expenditure in shops, 2021, target pop**	G + J	**£202.95 m**

A The population forecast range, LDP background paper, Population and Housing
B From Map Info information brief 6/02, the 2003 prices adjusted to 2005
C Based on projection of 2005 - 2020 figs, medium term trends, Table 3, MapInfo information brief 6/02, the 2003 prices adjusted to 2005
D See Paragraph D.30
E See Paragraph D.23 & Table 9
F See Table 8
H See Table 10
J See Paragraph D.26

Table 15 Existing Non-Bulky Comparison Goods Turnover

K	**Total Non Bulky Exp. in shops, 2021, target pop**	Table 14	**£202.95 m**

L1	Principal Centre Comparison Goods Sales Net Floorspace		38,230 sq.m
L2	Estimated Turnover £ / sq.m at 2006 prices		£2,500
L3	**Sub Total Estimated Turnover**	L1 x L2	**£95.58 m**
M1	Local Centre Comparison Goods Sales Net Floorspace		6,330 sq.m
M2	Estimated Turnover £ / sq.m at 2006 prices		£2,500
M3	**Sub Total Estimated Turnover**	M1 x M2	**£15.81 m**
N1	Large Convenience Store net space selling Comp. goods		5,420 sq.m
N2	Estimated Turnover £ / sq.m at 2006 prices		£5,000
N3	**Sub Total Estimated Turnover**	N1 x N2	**£27.10 m**
P1	Medium Convenience Store net space selling Comp. goods		2,290 sq.m
P2	Estimated Turnover £ / sq.m at 2006 prices		£2,500
P3	**Sub Total Estimated Turnover**	P1 x P2	**£5.73 m**
R1	Small Convenience Store net space selling Comp. goods		610 sq.m
R2	Estimated Turnover £ / sq.m at 2006 prices		£2,500
R3	**Sub Total Estimated Turnover**	R1 x R2	**£1.53 m**
S	**Total Estimated Existing Turnover**	L3+M3+N3+P3+R3	**£145.74 m**
T	**Total Unsatisfied Target Demand in 2021**	K - S	**£57.21 m**

Retailer turnovers are CCBC estimates based on review of national retail impact studies, 2006 prices

Allocations for Non-Bulky Comparison Stores

D.32 The public attitude surveys showed that, for non-bulky comparison purchases, residents viewed the larger shopping centres outside the County Borough as more attractive destinations than some of those within the borough, mainly because of the better choice of shops elsewhere. The surveys highlighted the relatively poor shopping provision in the County Borough and the indifferent image of certain smaller centres in relation to the competition. Some improvements have already occurred since the surveys were completed, but there is still a need for more non-bulky comparison goods floorspace, both to provide for growth and to retain more of residents' expenditure within the local economy. This would create more employment within the County Borough and also be in the interests of sustainability.

D.33 However, it is not sensible nor desirable to allocate sufficient new land to cater for the whole of the identified shortfall in provision for the following reasons. Cardiff, and to a lesser extent, Newport, will always be dominant attractions for non-bulky comparison goods purchases in the sub region. Therefore, it is unreasonable to expect to be able to divert the whole of the unsatisfied demand back within the borders of the County Borough.

Table 16 Demand / Supply for Non Bulky Comparison Goods

DEMAND SIDE

T	Unsatisfied Demand in 2021 at 2006 prices	Table 15	**£57.21 m**

SUPPLY SIDE: COMMITMENTS & PROPOSALS

1.1a	CM 4.2 Bargoed Plateau - Foodstore Comp. Goods est. net	5,500x.30x.70	1,155 sq.m
1.2a	Estimated Turnover £ / sq.m at 2006 prices		£5,000
1.3a	**Estimated Turnover**	1.1a x 1.2a	**£5.78 m**
1.1b	CM 4.2 Bargoed Plateau – Comp. Goods units est. net		4,200 sq.m
1.2b	Estimated Turnover £ / sq.m at 2006 prices		£2,500
1.3b	**Estimated Turnover**	1.1b x 1.2b	**£10.50 m**
2.1	CM 4.8 Adjacent to Lidl, Risca - site area		0.5 ha
2.2	Estimated gross floorspace at 2,500sq.m / ha		1250 sq.m
2.3	Estimated net floorspace at 70% of gross		875 sq.m
2.4	Estimated Turnover £ / sq.m at 2006 prices		£2,500
2.5	**Estimated Turnover**	2.3 x 2.4	**£2.19 m**
3.1	CM 4.9 Foundry Site, Risca - Foodstore Comp. Goods, actual net		3,160 sq.m
3.2	Estimated Turnover £ / sq.m at 2006 prices		£5,000
3.3	**Estimated Turnover**	3.1 x 3.2	**£15.80 m**
4.1	CM 4.13 Cardiff Road, Caerphilly – Comp. Goods units est. net		3,140 sq.m
4.2	Estimated Turnover £ / sq.m at 2006 prices		£2,500
4.3	**Estimated Turnover**	4.1 x 4.2	**£7.85 m**
5	**Total Est. Turnover of Non Bulky Comparison Goods Sites**		**£42.11 m**
6	**Remaining Unsatisfied Demand 2021**	T - 5	**£15.10 m**
7	**Total Supply relative to Unsatisfied Demand 2021**	5 / T	**73.6%**

Retailer turnovers are CCBC estimates based on review of national retail impact studies, 2006 prices

D.34 It is hoped that the initial strategy aim in attracting new foodstores to the main shopping centres will enhance these town centres, so that they become more attractive to the national multiple retailers of non-bulky comparison goods as well.

BULKY COMPARISON GOODS DEMAND AND PROVISION

Table 17 Bulky Comparison Goods Target Demand

A	Population of County Borough in 2021 at target figure		177,500
B	UK Comparison Expenditure / £ capita in 2006 at 2005	2003 x 0.949	£2,768
C	UK Exp. / £ capita in 2021, est. from 2020, at 2005 prices		£6,202
D	Bulky expenditure as % of total comparison expenditure		40%
E	Estimated % of bulky shopping in store v. online in 2021		50%
F	Target percentage of population to shop inside CB		40%
G	**Resident Bulky Comparison Exp. 2021, target pop**	A x C x D x E x F	**£88.07 m**
H	Shoppers visiting the CB area as % of target pop local spend	9.05%x45%x40%xA	2,891
J	Est. Visitor Bulky Exp., 2021, target pop local spend, x 1/3	C x D x H x 1/3	**£2.39 m**
K	**Total Bulky Expenditure in shops, 2021, target pop**	G + J	**£90.46 m**

A The population forecast range, LDP background paper, Population and Housing
B From Map Info information brief 6/02, the 2003 prices adjusted to 2005
C Based on projection of 2005 - 2020 figs, medium term trends, Table 3, MapInfo information brief 6/02, the 2003 prices adjusted to 2005
D See Paragraph D.30
E See Paragraph D.23 & Table 9
F See Table 8
H See Table 10
J See Paragraph D.26

Table 18 Existing Bulky Comparison Goods Turnover

K	**Total Bulky Expenditure in shops, 2021, target pop**	Table 17	**£90.46 m**

L1	Principal Centre bulky comparison net floorspace		7,810 sq.m
L2	Local Centre bulky comparison net floorspace		3,710 sq.m
L3	Retail Warehouse Parks bulky comparison net floorspace		20,050 sq.m
M1	Total Bulky Comparison Goods Net Floorspace		31,570 sq.m
M2	Estimated Turnover £ / sq.m at 2006 prices		£2,000
M3	**Total Estimated Turnover**	M1 x M2	**£63.14 m**
N	**Unsatisfied Target Demand in 2021**	K - M3	**£27.32 m**

L1, L2, L3 Caerphilly CBC Surveys
Retailer turnover is a CCBC estimate based on review of national retail impact studies, 2006 prices

Allocations for Bulky Comparison Stores

D.35 Within bulky comparison goods retailing, the County Borough has a significant shortfall in national multiple retail warehousing outlets, as shown in table 5.

D.36 Not all of the County Borough's retail needs for the future can be met within the defined Principal Town centres, particularly those stores selling bulky items such as DIY goods, carpets and furniture. Accordingly, two areas were identified in the UDP for such stores. There are still uncompleted development phases at Gallagher Retail Warehouse Park in Caerphilly. The Blackwood Gate Retail Warehouse Park, built on land beyond the southern edge of Blackwood Town Centre, is fully developed, but over half of the floorspace is still vacant.

D.37 While it is not sensible to expect to be able to capture all of residents' bulky goods expenditure for new stores within the County Borough, it is considered that the target increase to 40% is feasible over the plan period. Unlike other comparison goods retailers, the different retail warehousing firms are relatively similar concerns in terms of their prices, stock and quality throughout the country. Because of this similarity any new provision in the County Borough should be viable on the basis of the "intervening opportunity" principle. Many shoppers would cease to visit the more distant stores in other Boroughs if there was greater local provision, and this would assist in retaining a much greater proportion of residents' expenditure within the County Borough than at present.

Table 19 Demand / Supply for Bulky Comparison Goods

DEMAND SIDE

N	Unsatisfied Demand in 2021 at 2005 prices	Table 18	**£27.32 m**

SUPPLY SIDE: COMMITMENTS & PROPOSALS

1.1	Gallagher RWP - Consented Phase 2 Unit, gross floorspace		930 sq.m
1.2	net floorspace	90%	837 sq.m
1.3	Estimated Turnover £ / sq.m at 2006 prices		£2,000
1.4	**Estimated Turnover**	1.2 x 1.3	**£1.67 m**
2.1	Gallagher RWP - Consented Phase 2 Unit, gross floorspace		930 sq.m
2.2	net floorspace	90%	837 sq.m
2.3	Estimated Turnover £ / sq.m at 2006 prices		£2,000
2.4	**Estimated Turnover**	2.2 x 2.3	**£1.67 m**
3.1	Gallagher RWP - Proposed Phase 3, gross floorspace		8,750 sq.m
3.2	net floorspace	90%	7,875 sq.m
3.3	Estimated Turnover £ / sq.m at 2006 prices		£2,000
3.4	**Estimated Turnover**	3.2 x 3.3	**£15.75 m**
4.1	Gallagher RWP - Proposed Focus redevelopment		3,490 sq.m
4.2	net floorspace	90%	3,141 sq.m
4.3	Estimated Turnover £ / sq.m at 2006 prices		£2,000
4.4	**Estimated Turnover**	4.2 x 4.3	**£6.28 m**
5	**Total Est. Turnover of Bulky Comparison Goods Sites**	4 sites	**£25.38 m**
6	**Remaining Unsatisfied Demand 2021**	N - 5	**£1.95 m**
7	**Total Supply relative to Unsatisfied Demand 2021**	5 / N	**92.9%**

Floorspace figures from planning consents
Retailer turnovers are CCBC estimates based on review of national retail impact studies, 2006 prices

D.38 Therefore, the plan allocations represent a major step in the direction of meeting the projected expenditure target demand in bulky comparison goods. If this target is to be fully met, then in principle the release of additional bulky comparison goods floorspace might be in order, provided suitable sites could be identified. However, there will also be a need to monitor the impact of the progress at the Blackwood Gate and Gallagher Retail Parks before further allocations are considered.

Brownfield / Greenfield Split

D.39 The following table shows the split between the use of brownfield land as opposed to greenfield sites for the retail allocations. The nature of such proposals, in terms of their required size and adherence to national planning guidance on acceptable locations, means that it has not been possible to identify suitable sites for this purpose which are wholly brownfield.

Table 20 Commercial Site Allocations: Brownfield / Greenfield split

Ref	Site Name	Brownfield	Greenfield
CM 4.1	The Lawn, Rhymney	7.3	
CM 4.2	Bargoed Retail Plateau, Bargoed	2.7	
CM 4.3	Former Cinema, Hanbury Square, Bargoed	0.1	
CM 4.4	Car Park Site, Rear of High Street, Blackwood	0.1	
CM 4.5	Gateway Site, Newbridge	0.3	
CM 4.6	Former Penallta Colliery, Ystrad Mynach	2.0	
CM 4.7	Former Palace Cinema, Risca / Pontymister	0.2	
CM 4.8	Adjacent to Lidl, Risca / Pontymister	0.5	
CM 4.9	Foundry Site, Risca / Pontymister	5.6	
CM 4.10	Gallagher Extension, Caerphilly		3.3
CM 4.11	Gallagher Redevelopment, Caerphilly	2.3	
CM 4.12	Park Lane, Caerphilly	0.3	
CM 4.13	Cardiff Road, Caerphilly	1.1	
CM 4.14	Castlegate, Caerphilly	3.5	
	Total	**26**	**3.3**
	Percentage	88.7%	11.3%

figures in ha

SECTION E

E MAIN RETAILING GUIDANCE ISSUES ARISING FOR THE LDP

E.1 The Ministerial Interim Planning Policy Statement 02/2005 (MIPPS) entitled *Planning For Retailing And Town Centres* issued in November 2005 completely replaces sections 10.1 to 10.3 of Planning Policy Wales 2002 which have been cancelled. It is understood that the amendments contained in the MIPPS will be incorporated in the next full revision of Planning Policy Wales. The Assembly Government used this opportunity to update advice having some regard to the English Guidance under PPS6 Planning for Town Centres. Obviously the planning framework is different in Wales and the nature of retailing development possibly of smaller scale in the Principality.

E.2 There are many small changes of emphasis but the main amendments in Guidance regarding the LDP are considered to be as follows:

*"These (*development*) plans should establish the existing hierarchy of centres, identify those which fulfil specialist functions and be clear about their future roles."*

- Local Planning Authorities are now asked to go further in describing the retail hierarchy than in the past and define each particular type of retailing area and consider their future position / status in the Plan.

"In some situations it may be necessary to take pro-active steps to identify town or city centre locations for expansion or in others manage the decline in relative importance of a centre as other centres expand."

- Local Planning Authorities are now asked to actively manage the spatial growth or decline of the retail centres, for example by modifying the defined town centre boundaries accordingly.

"Precedence should be accorded to establishing quantitative need for both convenience and comparison floorspace particularly as a basis for development plan allocations before qualitative factors are brought into play. Qualitative assessment should cover both positive and negative implications."

- Local Planning Authorities are now required to first demonstrate quantitative need. It will not be sufficient to justify or decline a retail proposal on qualitative factors alone.

"When proposing a development plan allocation in an edge of centre or out-of-centre location for uses best located in an existing centre, local planning authorities must have regard to need and the sequential test and be able to fully justify the proposal."

- It is now more firmly stated that Local Planning Authorities must apply the test equally to Plan allocations as to developer proposals.

E.3 Town Centre Retail Proposals:

- Town centre boundaries should be identified for the five Principal Towns which are listed in the Preferred Strategy, namely Bargoed, Blackwood, Caerphilly, Risca / Pontymister, and Ystrad Mynach.
- The current UDP Primary Areas in Blackwood and at Castle Court, Caerphilly should be continued in the LDP. The current UDP Primary Area in Cardiff Road, Caerphilly should be transferred to the redevelopment site indentified in the LDP,

but for the meantime this designation should be removed. Eventually, a further Primary Area should also be designated for Bargoed as part of the Plan review, because of the expected improvement in retailing fortunes of that centre during the plan period. Within these areas use class A1 provision is protected by changes of use from that class being limited.

- Where known, undeveloped sites and extant planning consents for retail stores, offices and commercial leisure within the Principal Towns will be designated in the LDP. Future redevelopments could be set down as SPG within Town Centre Action Plans.
- Changes of use from retail to residential purposes in town centres should be prevented unless the property is on the periphery of the centre and the vacancy rate is high.
- Proposals for A3 Take Aways will need to satisfy criteria to prevent detrimentally effects where residential amenity is an issue and to avoid highway obstruction problems. The numbers of A3 Take-Aways in the hearts of our town centres will also tend to be restricted by the operation of the Primary Area policy.
- A suitable policy in the LDP will be needed to provide the justification for the completion, where necessary, of town centre specific and retailing specific SPG, such as action plans.
- All proposals will also be subject to the criteria based County-wide control policies.

E.4 Out of Town Retailing Proposals:

- All new store proposals concerning non-bulky comparison goods floorspace should locate within the designated town centre boundaries.
- Proposals for convenience stores under 1,000 sq. m. should be permitted in urban areas beyond town centres provided there is demonstrable unsatisfied demand.
- Proposals for bulky comparison goods floorspace will be expected to locate first within the designated retail parks in Caerphilly and Blackwood. Otherwise, they should be in line with the application of the sequential test and in observance of the need to maximise accessibility to the chosen location by means of public transport.
- Proposals for A3 Take Aways will need to satisfy criteria which prevent detrimental effects on residential amenity and also be capable of avoiding the incidence of highway obstruction problems.

CONCLUSIONS

E.5 The proposed policy framework for Retailing Development Issues in the LDP therefore includes the identification of suitable site allocations and also policies which aim to protect and enhance the viability and vitality of the major retail centres in the County Borough giving regard to the identification of the role and function of those settlements.

E.6 This LDP retail policy framework is considered to accord with, be underpinned by, and implement the following key components of the Plan Strategy:

1. Target development to reflect the roles and functions of individual settlements
2. Allow for development opportunities in the Heads of the Valleys Regeneration Area
3. Promote a balanced approach to managing future growth
4. Exploit brownfield opportunities where appropriate
5. Promote resource efficient settlement patterns

END