SD48

Blaenau Gwent County Borough Council
Cyngor Bwrdeisdref Sirol Blaenau Gwent







(Updated) Retailing Background Paper
Papur Cefndirol Adwerthu (Wedi'i Ddiweddaru)

Deposit Local Development Plan
Cynllun Adeneuo Datblygu Lleol

February/Chwefror 2012
www.blaenau-gwent.gov.uk

CONTENTS Page

TABLES

APPENDICES

1.0 INTRODUCTION

Aim

1.1 The aim of this Background Paper is to set out how the objectives, policies and allocations relating to Retailing have been identified and developed.

Overview of how this Paper fits into Plan preparation

1.2 This Paper will provide information for Officers and Members of the Authority, stakeholders, members of the public and the Inspector to help explain the approach taken on Retailing.

Context

1.3 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.

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

1.5 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 the rise in car ownership has resulted in a major shift 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.

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

1.7 This Background Paper sets out:

- **The National Policy Context** for retailing;
- **The Regional Policy Context** for retailing;
- **The Local Policy Context** for retailing;
- **Retailing Provision** in Blaenau Gwent;
- **Measures of Vitality and Viability;**
- **Review of Current Retail Designations;**
- **Demand and Provision;**
- **Results of Previous Consultation**, in relation to retailing; and
- **Draft LDP Policy**, which provides the proposed planning policy context for retailing in Blaenau Gwent.

2.0 NATIONAL POLICY CONTEXT

Wales Spatial Plan - People, Places, Futures (July 2008)

2.1 The Wales Spatial Plan forms one of the high-level strategic 'building blocks' of the Welsh Assembly Government. The Wales Spatial Plan is a material planning consideration for Local Planning Authorities, who are statutorily obliged to have regard for objectives, aims and requirements of the Wales Spatial Plan in developing their Local Development Plans.

2.2 The Wales Spatial Plan sets a vision for how each part of Wales should develop economically, socially and environmentally over the next 20 years. It guides the way the Assembly Government will spend its money over the coming years. The Wales Spatial Plan reinforces the Welsh Assembly Government's commitment to developing a sustainable future for Wales, including the statutory duty to promote sustainable development in all its work to meet the social, economic and environmental needs of the people now and in the future.

2.3 The Core themes of the Plan are:

- Building Sustainable Communities;
- Promoting A Sustainable Economy;
- Valuing Our Environment;
- Achieving Sustainable Accessibility;
- Respecting Distinctiveness; and
- Working with Our Neighbours.

2.4 Blaenau Gwent is within the South East Wales – Capital Region. The vision for the area is:

'An innovative skilled area offering a high quality of life – international yet distinctively Welsh. It will compete internationally by increasing its global visibility through stronger links between the Valleys and the coast and with the UK and the rest of Europe, helping to spread prosperity within the area and benefiting other parts of Wales.'

2.5 Blaenau Gwent along with the neighbouring Authorities of Merthyr Tydfil, Monmouthshire, Torfaen, Rhondda Cynon Taf, Caerphilly, Cardiff, Bridgend, Newport and the Vale of Glamorgan have worked together to identify more detail on how the area is to develop in the future. The Capital Region has been broken down into three areas: Heads of the Valleys Plus; Connections Corridor; and the City Coastal Area.

2.6 Blaenau Gwent falls within the Heads of the Valleys Plus area. This is an area comprising the Upper Valleys of South East Wales facing some of the greatest economic and social change challenges created by economic restructuring of the late 20th century.

2.7 Under the core theme of 'Building Sustainable Communities' Ebbw Vale is identified as being a key settlement that has a critical role to play in the success of the Capital Region. It must be successful in its own right and, where appropriate, function as a service and employment hub for smaller settlements. It will provide the central framework around which high capacity sustainable transport links will be developed. Other settlements in the area need modern shopping, leisure, community and cultural facilities, more attractive and affordable housing, clean vibrant town centres, accessible open countryside and employment opportunities.

2.8 In terms of 'Respecting Distinctiveness' each Town and City needs to foster its own distinct sense of identity, building on its heritage and culture to create a network of settlements with real character which complement each other and each add strength to the attractiveness of the region as a whole. Recognising the value of the Area's diversity of landscapes, built environments and distinctive communities will be key to building confidence and helping to market a regional offer for inward investment and for tourism.

Planning Policy Wales Edition 4 (February 2011)

2.9 Planning Policy Wales (PPW) sets out the land use planning policies of the Welsh Assembly Government. PPW is national planning policy and local government is obliged to take the requirements of PPW into account when preparing development plans. Assembly Government retailing policy is embodied in chapter 10 of Planning Policy Wales (2011). Further guidance in relation to retailing is contained in Technical Advice Note 4 (1996).

2.10 The Assembly Government's objectives for retailing are to provide:

- 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 village centres as the most appropriate locations for retailing, leisure and other complementary functions;
- 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.

2.11 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.

2.12 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.

2.13 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 proactive 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.

2.14 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.

2.15 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.

2.16 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.

2.17 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; and
- Set out policies for primary and secondary frontages, where appropriate.

Technical Advice Note (TAN) 4 – Retailing and Town Centres (1996)

2.18 Technical Advice Note (TAN) 4: Retailing and Town Centres provides advice on how important town centres are to the economy. It advises how to measure the vitality and viability and attractiveness of town centres. It refers to the importance of managing town centres and how effective strategies and partnerships can increase the productivity of a centre. It identifies that a joined up approach is needed working on factors such as the street scene but also social and environmental factors.

3.0 REGIONAL POLICY CONTEXT

"Turning Heads…" – A Strategy for the Heads of the Valleys 2020 (June 2006)

3.1 The Heads of the Valleys Strategy sets out a broad framework for change in the Heads of the Valleys area. The Heads of the Valleys Programme area covers the whole of Blaenau Gwent. The strategy provides a framework for regenerating the area with a focus on 5 priority themes:

- An attractive and well-used natural, historic and built environment;
- A vibrant economic landscape offering new opportunities;
- A well-educated, skilled and healthier population;
- A appealing and coherent tourism and leisure experience; and
- Public confidence in a shared bright future.

3.2 With regard to retailing, Strategy Programme 1: A Sub-Regional Approach to the Regeneration of Settlements comments as follows:

"To preserve and make the most of historic patterns of settlement, we will identify roles for towns and villages in each of the Heads of the Valleys that enable them to complement each other and that serve the diverse needs of those who live in, work in and visit the area. Our focus will be on retailing and service centres, tourist towns, and employment hubs".

Public Realm Design in the Heads of the Valleys: A Good Practice Guide (December 2008)

3.3 The Good Practice Guide to Public Realm Design has been commissioned by the five local authorities in the Heads of the Valleys area of South Wales who recognise that the way that public realm is designed, managed and maintained is crucial to the way that town centres are perceived and used.

3.4 The County Borough Councils of Rhondda Cynon Taf, Caerphilly, Merthyr Tydfil, Blaenau Gwent and Torfaen have collaborated with the Welsh Assembly Government to commission the document.

3.5 The Good Practice Guide is primarily concerned with streets and all of the other spaces between buildings in town centres which can be accessed by the general public. The guidelines contained in this document are intended to help create streets which satisfy the following objectives:

- Streets should be designed in a way which puts people first;
- Public realm must be safe, clean and attractive;
- Town centres need to be diverse, vibrant places that have a variety of functions;
- A public realm should communicate the common character of the Heads of the Valleys whilst allowing individual town's unique characteristics to shine through; where possible, the public realm should refer to the varied history of the region; and
- Streets should be created and managed in a way which safeguards the environment for future generations.

4.0 LOCAL POLICY CONTEXT

4.1 As a corporate document, the Local Development Plan must have regard to other documents produced by the Council. The relevant documentation relating to retailing is set out below.

Making a Difference – The Big 20 Year Plan for Blaenau Gwent 2010 to 2030

4.2 The Community Strategy builds on the work undertaken by the Community Plan and takes forward the Vision of making: Blaenau Gwent a better place to live, work and visit. The Community Strategy has 7 key themes and each theme has its own vision:

Lively and Accessible Communities
Creating communities that

Thriving Communities
Offering the opportunities, support and resources in our communities for people

people enjoy and want to live in | *to thrive*

Fair and Safe Communities
Making people feel safer and included in our communities

Learning Communities
Giving people the skills to succeed

Healthy Communities
Helping people to be healthy and get the right care and support when they need it

Green & Sustainable Communities
Improving our environment today for tomorrow

Leading Communities
Working with, and for our communities

4.3 Retailing is under the theme Thriving Communities. The aim is to get more people into work. This will be achieved by widening our economy to attract new businesses; and helping existing businesses become stronger to preserve local jobs.

Blaenau Gwent Regeneration Strategy and Action Plan – Draft First Revision (December 2010)

4.4 The Regeneration Strategy and Action Plan identifies an overarching aim and six principles along with the proposals to translate them into action. The overarching aim is to 'Share Benefits of Regeneration Widely.' This will be achieved by ensuring that the benefits of regeneration are shared by all those in Blaenau Gwent. The six principles are:

- Principle 1: Diversify the Economy and Develop Manufacturing
- Principle 2: Boost Business Support and Enterprise
- Principle 3: Promote Learning and Modern Skills
- Principle 4: Focus Investment in key communities
- Principle 5: Deliver 'The Works' as a national flagship
- Principle 6: Develop the Transport Infrastructure

4.5 Under principle 4 there are two projects identified that are relevant to retailing:

- **The Community Hub and Spoke Network**

This involves the creation of a transformational network of four integrated community hubs in Ebbw Vale, Tredegar, Upper Ebbw Fach and Lower Ebbw Fach, each anchored by a new secondary school and linked learning, community and enterprise facilities.

- **Area Regeneration Frameworks**

A series of area based studies to establish appropriate and sustainable physical regeneration priorities and delivery plans for the four key areas and communities, linked closely to priorities for skills, learning, enterprise and community development.

Ebbw Vale Town Centre Urban Design Framework (January 2002)

4.6 RPS Warren was commissioned by the WDA and Blaenau Gwent County Borough Council in April 2001 to prepare an Urban Design Framework for the Town Centre of Ebbw Vale. The aim of the study was to create a policy context for future projects and development studies and provide guidance in relation to proposed modifications to the pedestrian and vehicular circulation in the town centre. In particular the study focussed on the Lower Bethcar Street area of the town centre and prepared a set of architectural and urban realm guidelines for the street and the buildings on its east side.

Final Draft of Town Links Study, Ebbw Vale (May 2008)

4.7 The Town Links Study is an urban design study of the links between the Steelworks site and the wider connections within Ebbw Vale. The study has been carried out in conjunction with the ongoing development of the Steelworks Masterplan and the regeneration of the town, and identifies both short and medium term scenarios as well as longer term aspirations. This is to identify not only local improvements to the public realm, but also to highlight sites within the study areas that are of strategic significance to the regeneration of Ebbw Vale.

4.8 The study is split into several study areas. The study areas relevant to retailing are:

- **The Walk** – The Walk is the link from the town centre to the urban centre of The Works and includes part of the A4046, where it bypasses the town centre. At present there is no cohesion between the Masterplan site and Bethcar Street (the main shopping street in the town centre), despite their proximity. The opportunity exists for substantial change in this area, turning the town centre from an inward looking high street with inactive frontages facing the steelworks site into a new gateway, embracing and overlooking the valley and ‘The Works’ Masterplan. Three different options have been developed for The Walk according to different levels of intervention. All the options include traffic calming to the A4046 and improved public transport facilities; however, they vary in terms of the strategic significance of the intervention of the link between the Masterplan and Bethcar Street. As the options for The Walk cover a wider area and affect several sites they need to be tested further in terms of planning, viability, statutory services and landownership.

- **Market Square** - Market Square is one of the key junctions in the centre of Ebbw Vale and it is where the main approach routes of Ebbw Vale meet. It is a traffic dominated environment surrounded by underused and partly derelict buildings. The opportunity to improve Market Square will present itself once the Peripheral Distributor Road (PDR) is built, allowing different highway arrangements and releasing further areas for development. The aims for this site are to consolidate existing plots, provide frontage and enclosure to the public realm and improve the pedestrian environment. The proposals presented for Market Square are a starting point for further design work, as this highly constrained site requires a thorough design approach.

- **Cemetery Road** – Cemetery Road is an out of town route that provides access to both Ebbw Vale town centre and ‘The Works’ Masterplan site. This road will become part of the PDR and will be subject to significant changes. The proposals presented in the study focus on a landscape framework for the road, and highlight pedestrian desire lines and potential cycle lanes. It also explores options to change the gyratory at Libanus Road into a staggered junction.

Ebbw Vale Sustainable Regeneration Framework Draft Report (July 2010)

4.9 In March 2009, ERM, Powell Dobson, DTZ and Capita Symonds were commissioned on behalf of Blaenau Gwent CBC and WAG to prepare an over arching framework to guide the future sustainable development of Ebbw Vale, with particular focus on the town centre and the northern corridor. The town centre is recognised as needing an ambitious but complementary set of projects, which work cohesively with the Northern Corridor and 'The Works'.

4.10 The Ebbw Vale Sustainable Development Framework has identified the following key factors for Ebbw Vale Principal Town Centre:

- The need to develop the links from The Works regeneration area;
- Identified market demand for a Town Centre food retail outlet as an anchor store;
- The opportunity for improved public transport infrastructure and reduced through traffic as a result of the proposed Peripheral Distributor Road within the Works; and
- The opportunities to capitalise on town centre regeneration opportunities as a consequence of the relocation and redevelopment of some of the public sector buildings in the Ebbw Vale Northern Corridor.

4.11 The Ebbw Vale Sustainable Development Framework has assessed the development potential of the town centre and has identified the following town centre projects:

- **Southern Gateway:** A new southern gateway to Ebbw Vale Principal Town Centre is proposed incorporating a commercial hub, direct, safe and convenient pedestrian connection between the town centre and The Works. The Town Centre would benefit from more visitors as a result of a proposed office development and a new food store. The development offers the opportunity to make a significant landmark statement at a key point where the funicular will bring people up from 'The Works' site. In order to create this optimum link the A4046 needs to have a traffic calmed carriageway. There is also an opportunity to explore the development of land on the opposite side of the A4046 on the site of the current petrol filling station. This could provide a private sector developer with the chance to enhance the mix and quality of retail and commercial floor space in the town.
- **Market Square:** Redevelopment of Market Square, Ebbw Vale is to provide a key link with Ebbw Vale Northern Corridor site. The proposal involves the redesign of the junction arrangement with improved pedestrian movements. The proposal also involves development opportunities for mixed-use development.

4.12 The above town centre projects are reflected in the Local Development Plan through an Action Area policy.

Tredegar Townscape Initiative – Conservation Area Appraisal & Design Guide (2005)

4.13 The Tredegar Townscape Initiative, prepared by Capita Symonds, is split into two distinct parts. Part 1 contains a Conservation Area Appraisal which outlines and defines the unique heritage and special interest of the area. Part 2 is a design guide which will help secure designs that are sustainable and respect and enhance their townscape setting.

4.14 In terms of retailing, a conservation area has been designated in the southern part of Tredegar Town Centre covering Castle Street, The Circle and part of Morgan Street. The aim of the Tredegar Townscape Initiative – Conservation Area Appraisal & Design Guide is to ensure the vitality of the town centre whilst also retaining and enhancing its historic and architectural character.

The Brynmawr Urban Design Strategy and Masterplan (2001)

4.15 In 2001, the decline of Brynmawr was identified as a concern by the Welsh Assembly Government and Blaenau Gwent County Borough Council. In response, Macgregor Smith in association with DTZ were commissioned to produce an Urban Design Strategy and Masterplan for the town. The strategy set out a framework to shape the future regeneration of Brynmawr, which was based on addressing the following retailing issues:

- To retain existing employment and commercial activities within the town;
- To create a high quality environment meeting the requirements of the town's existing and future generations;
- To provide a general quality of environment which helps to improve the overall image of the area to potential investors and visitors;
- To facilitate and support new investment in the town which strengthens and diversifies the town's economic base; and
- To provide accessibility for all to and within the town, and make the town a safe and attractive living and working environment.

4.16 In response to the above issues, the following retailing objectives for the strategy were developed:

- To engender the revitalisation of the town centre;
- To create a unique and attractive destination for visitors and local residents, with a distinctive sense of place;
- To review traffic management and parking issues to ensure optimum efficiency of traffic movement and use of the car park areas;
- To provide improved public amenity facilities for the local community, in particular for young people; and
- To identify opportunities for future economic development within the town.

4.17 The strategy identified that it was important to create effective linkages between the town centre, the Lakeside housing development and the Asda store and adjacent retail units which are now developed and known as Lakeside Retail Park.

Brynmawr Town Centre Visioning Report for Link Sites (October 2008)

4.18 In response to the Brynmawr Urban Design Strategy and Masterplan, Macgregor Smith in association with DTZ, prepared a Brynmawr Town Centre Visioning Report for Link Sites.

4.19 The report identified the key link site between the existing town centre and the Lakeside development as the NMC factory and the Bus Depot. The redevelopment of the site is fundamental to the successful regeneration of Brynmawr District Town Centre. The site is located mid way between Lakeside Retail Park and Brynmawr District Town Centre. The site is a triangular piece of land covering 2.95 ha. The site contains large-scale factory buildings from its former use.

4.20 The Report has identified that *"the redevelopment of the site will help to ensure that the town centre benefits from the presence of the Asda superstore and Lakeside Retail Park development."* The Report has assessed the development potential of the site and has identified the following elements:

- **Residential** – maximum of 60 houses including 10% affordable housing; and
- **Commercial / Leisure/ Community Facility opportunity** to act as an active link between Brynmawr District Town Centre and Lakeside Retail Park.

4.21 The residential element to the redevelopment of the site will sustain and increase the residential population which in turn will help regenerate the town centre by increasing footfall.

4.22 The leisure offer of Brynmawr is currently considered to be limited and the potential exists to develop a commercial / leisure / community facility, which would help to increase facilities for the community and attract more visitors to the town.

4.23 The Local Development Plan reflects the findings of this report and allocates the site for mixed-use development.

Abertillery Regeneration Strategy (November 2006)

4.24 Powell Dobson Urbanists were appointed in September 2005 to prepare a regeneration strategy for Abertillery town centre.

4.25 The Abertillery Regeneration Strategy identifies a vision, strategy and objectives for Abertillery town centre. To deliver the strategy and the sustainable regeneration of Abertillery, a number of projects have been identified.

4.26 The projects have been organised into 4 key project groups:

- Redefining the town centre boundary and offer;
- Public Realm Enhancements;
- Traffic Management Enhancements; and
- Improving Strategic Links.

5.0 RETAILING PROVISION

5.1 There are five retail centres in Blaenau Gwent; these being Ebbw Vale, Tredegar, Brynmawr, Blaina and Abertillery. There are also a number of small neighbourhood centres and individual units serving more immediate needs.

5.2 In recent years types of retailing new to the County Borough have appeared in the form of food superstores. These have located on the edge of the retail centres or in out of town locations.

Table 1: Floorspace Totals for the defined Retail Centres

Retail Centres	Convenience Goods / gross sq ft	Comparison Goods / gross sq ft	Total Retail Space (sq ft)
Ebbw Vale	26,016	116,967	142,983
Tredegar	34,826	55,440	90,266
Brynmawr	3,366	31,088	34,454
Abertillery	10,970	39,841	50,812
Blaina	6,549	3,496	10,044
Total	**81,727**	**246,832**	**328,559**

Source: CACI Retail Study (2008)

5.3 Table 1 above provides the data for the gross floorspace for convenience and comparison goods in each of the retail centres. In terms of comparison goods floorspace, Ebbw Vale accounts for nearly 50% of the total comparison floorspace within Blaenau Gwent's town centres, whilst Blaina accounts for 1%. In all retail centres, except Blaina the comparison goods floorspace is greater than convenience goods floorspace. This suggests that Blaina has a local shopping centre role in that it serves the immediate needs of local residents where the emphasis is on food shopping.

Table 2: Floorspace Totals for Out of Town Retail Centres

Retail Centres	Convenience Goods / gross sq ft	Comparison Goods / gross sq ft	Total Gross Retail Space (sq ft)
Morrisons, Ebbw Vale*	28,572	7,142	35,714
Tesco, Ebbw Vale**	30,915	13,249	44,164
Festival Park Outlet Centre, Ebbw Vale	Data unknown	Data unknown	90,700
Focus, Rhyd y Blew Retail Park, Ebbw Vale	0	24,990	24,990
Lakeside Retail Park, Brynmawr**	30,628	50,522	81,150
Tesco, Abertillery***	20,218	2,246	22,464
Total	**110,333**	**98,149**	**299,182**

Source: Blaenau Gwent CBC Surveys (2009)

* Figures take into account the supermarket selling 80% of convenience goods and 20% comparison goods

** Figures take into account the supermarket selling 70% of convenience goods and 30% comparison goods

*** Figures take into account the supermarket selling 70% of convenience goods and 30% comparison goods

5.4 Table 2 provides the gross floorspace for the retail centres which are located outside the defined town centre boundaries. These retail centres provide an additional 299,182 sq ft of retailing floorspace in Blaenau Gwent.

Table 3: The Number of Comparison and Convenience in the Retail Centres

Retail Centre	Comparison	Convenience	Total
Ebbw Vale	42	7	49
Tredegar	46	12	58
Brynmawr	26	7	33
Abertillery	30	7	37
Blaina	7	4	11

Source: Blaenau Gwent CBC Surveys (2009)

5.5 Table 3 gives an indication of the number of comparison and convenience retailers operating in each of the 5 retail centres. The data is based upon the town centre boundaries defined for the Unitary Development Plan.

5.6 Table 4 below shows the extent to which national multiple retailers have found our retail centres to be desirable locations for their branches.

Table 4: The Number of National Retailers as a % of Totals

Retail Centre	Comparison	Convenience
Ebbw Vale	57%	43%
Tredegar	26%	33%
Brynmawr	23%	43%
Abertillery	27%	29%
Blaina	14%	50%

Source: Blaenau Gwent CBC Surveys (2009)

Convenience Goods Retailing

5.7 Examples of convenience goods include food, alcoholic and non-alcoholic drinks, tobacco, newspapers, magazines and other non-durable household goods.

5.8 Table 5 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.

5.9 Pre 1990's there were few modern developments in food retail provision in the County Borough. Smaller independent stores such as butchers, greengrocers, ironmongers, newsagents and others small shops located in town centres provided the food provision. In the early 1990's, 4 national supermarket stores opened in town centre locations: the Co-operative opened a store in Blaina; Lidl opened a store in Tredegar; Aldi in Ebbw Vale and Somerfield opened in Abertillery. The late 1990's and early 2000's witnessed the growth of out of town food superstores. In 1997 Tesco opened a store in Ebbw Vale and then the following year in Abertillery. At this time smaller food chains namely Iceland and

Farmfoods opened stores in the town centres of Ebbw Vale and Tredegar respectively. Morrisons replaced the Co-operative store located in Ebbw Vale in 2003. Asda opened in 2005 at Lakeside Retail Park, Brynmawr. In February 2008, Tesco Stores in Ebbw Vale were granted planning permission to extend the sales area by 18,341 sq ft. Taken together the large food stores identified in Table 5 represent a total of 210,723 sq ft of net sales area.

5.10 It is the intention that the LDP policy should build on the food store provision which has been successfully attracted to the main town centres over the last two decades. The Ebbw Vale Sustainable Development Framework identifies a redevelopment scheme which identifies a new southern gateway to Ebbw Vale town centre, incorporating an office development and potential 5,000 sq ft food store. The proposal provides a positive solution to a number of the unoccupied and unattractive buildings in the town centre. In addition, this project would significantly increase the daily footfall through the town centre.

Table 5: Larger Foodstores (over 3,000 sq ft)

Hub Area	Name	Total Net Sales Area (sq ft)	Location*
Ebbw Vale	Tesco *Tesco Extension#* Morrisons Aldi Iceland *Proposed Food Store*	36,800 *18,341* 29,762 11,173 5,200 *5,000 estimate*	OOC *OOC* OOC TC TC *TC*
Tredegar	Aldi Lidl Farmfoods	29,095 9,000 3,000	TC TC TC
Brynmawr	Asda	35,005	EOC
Abertillery	Tesco Somerfield	18,718 *5,000 estimate*	EOC TC
Blaina	Co-operative	4,629	TC
	Total	**210,723**	

Locations are based on definitions included in Annex A of Technical Advice 4: Retailing and Town Centres
*TC Town Centre Location
*EOC Edge of Centre
*OOC Out of Centre
Planning permission granted on site
Source: BGCBC Retail Surveys (2009) & Floorspace data derived from IGD Database, GOAD and DPP Surveys

Comparison Goods Retailing

5.11 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.

5.12 The Comparison goods gross floorspace totals for the Town Centres are shown in Table 1 above. In the past, improvements to comparison goods provision have been achieved by an extension to Ebbw Vale town centre known as The Walk.

5.13 Through the LDP, it is not anticipated that there should be a further significant spatial expansion of the centres because such development would encroach into residential areas and possibly lose retail centre cohesion. Instead, redevelopment schemes have been identified in Ebbw Vale town centre and it is hoped that redevelopment schemes may come forward to increase total floorspace within the other existing town centre boundaries for example in Abertillery (see Table 13).

5.14 The Ebbw Vale Sustainable Development Framework assessed the development potential of the town centre and identified a scheme in relation to comparison goods retail. The Market Square scheme identifies approximately 13,000 sq ft of development opportunities for retail, mixed use and public realm opportunities.

5.15 A vacant triangular piece of land at Market Street in Ebbw Vale Town Centre has also been identified as a further retail development opportunity.

5.16 The Comparison goods floorspace totals for the out of town retail sites are shown in Table 2 above. In 1997, Festival Park Factory Outlet Centre opened on the last National Garden Festival site in Ebbw Vale. It provides a distinct form of retailing that draws trade from a sub regional catchment. The outlet centre covers 90,700 sq ft and comprises of over 40 units. In 2007, Festival Park Outlet Centre was granted planning permission for 15,300 sq ft of additional gross shopping floorspace. The operators of the centre identified the need to expand in order to attract new tenants such as Next Clearance; Gap Outlet; Clarkes Factory Shop and Marks & Spencers Outlet.

5.17 In 2006, planning permission was granted for 90,000 sq ft of non food retail on land adjacent to the south west of the existing Focus Store in Ebbw Vale. The approval comprises of 13 retail units of varying sizes. Ground works have commenced at the site, however no ‘building’ work have taken place thus far.

5.18 In 2005, an edge of centre retail park opened in Brynmawr known as Lakeside Retail Park. The retail park comprises of an Asda store, 7 A1 comparison retail units and a family public house.

5.19 In addition, as identified in Table 2, a number of the larger supermarkets provide an element of comparison retailing.

Retail Warehousing

Table 6: Retail Warehousing Floorspace (Bulky Goods)

Location	Gross Floorspace (Sq Ft)	Store
Rhyd y Blew Retail Park, Ebbw Vale	24,993	Focus
Lakeside Retail Park, Brynmawr	5,005	Halfords
Total	**29,998**	

Source: Blaenau Gwent CBC Survey

5.20 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. The two national multiple retailers in the retail warehousing sector is listed in Table 6.

Food and Drink Uses

5.21 Blaenau Gwent County Borough Council, as the Local Planning Authority, receive numerous planning applications each year to build new and change the use of buildings and retail units to hot food takeaway establishments and public houses in the town centres. Table 7 and 8 below show the number of hot food takeaway establishments and public houses operating in the town centres (according to the Unitary Development Plan town centre boundary) between 2006 and 2009.

Table 7: The Number of Hot Food Takeaway Establishments Operating in the Town Centres

Retail Centre	2006	2007	2008	2009
Ebbw Vale	8% (11)	7.8% (11)	8.6% (12)	7.1% (10)
Tredegar	7% (12)	7% (12)	7% (12)	7% (12)
Brynmawr	7% (11)	7% (11)	7% (11)	7.7% (12)
Abertillery	7% (12)	5.5% (9)	7.4% (12)	7.5% (12)
Blaina	6% (4)	10.8% (7)	9% (6)	9% (6)

The number in the bracket denotes the number of ground floor units
Source: Blaenau Gwent CBC Retail Surveys (2006, 2007, 2008 and 2009)

Table 8: The Number of Public Houses Operating in the Town Centres

Retail Centre	2006	2007	2008	2009
Ebbw Vale	2.5% (4)	2.5% (4)	2.5% (4)	2.2% (3)
Tredegar	3.5% (6)	3.5% (6)	2.3% (4)	3.5% (6)
Brynmawr	5% (8)	5% (8)	4.5% (7)	4.5% (7)
Abertillery	4% (6)	4% (6)	4.3% (7)	3.2% (5)
Blaina	9% (6)	8% (5)	9.1% (6)	8% (5)

The number in the bracket denotes the number of ground floor units
Source: Blaenau Gwent CBC Retail Surveys (2006, 2007, 2008 and 2009)

5.22 The increase in the number of people using these facilities led to concern being expressed by local residents, local businesses and others, in terms of their impact on both the character of the area, vitality of the shopping areas and residential amenity. In response to the concerns raised, research was carried out to assess the situation, in particular to look at how the balance of uses in the town centre has changed, what effect this has had and whether specific planning guidance is required to regulate new build and further proposed changes of retail units and buildings to hot food takeaway establishments and public houses in town centres.

5.23 This led to the production of Supplementary Planning Guidance entitled Hot Food Takeaways and Public Houses in Town Centres. The purpose of the Supplementary Planning Guidance is to expand upon the Council's existing planning policy on food and uses contained within the adopted Blaenau Gwent Unitary Development Plan.

5.24 The Supplementary Planning Guidance considers that food and drink uses are considered to be more appropriately located in town centres, rather than outside as they add to the vitality of the town centres, providing diversity and support to the daytime retail and evening time leisure economies. However the number and concentration of such uses should not detract from the overall character and function of the centres.

5.25 Paragraph 10 of Technical Advice Note 4: Retailing and Town Centres states that: *"Changes of use can create concentrations of single uses, such as restaurants and takeaway food outlets, where cumulative effects can cause local problems. Such proposals should be assessed against development plan policies on their contribution to diversification and on the cumulative effects on matters such as parking and local residential amenity."*

5.26 The Supplementary Planning Guidance employed two controls to control the number and concentration of hot food takeaway establishments and public houses. The first was to control the number of hot food takeaways and public houses operating in the town centres and to set a maximum threshold for each of the towns:

As far as the town centres are concerned, the number of hot food takeaway establishments should be equal to or no greater than 7.0% of the total number of retail units/ buildings in the town centre and the number of public houses should be equal to or no greater than 4.0% of the total number of retail units/ buildings in the town centre.

5.27 The second was to control the concentration of hot food takeaways and public houses operating in the town centres:

In order to minimise the impact on vitality and viability, no more than 3 hot food takeaways and/ or public houses should be located within close proximity to each other in the town centres*. Advice should be sought from the architectural liaison officer and the planning policy team (see Appendix B for contact details) and each application will be assessed in terms of the crime and police incident records and the town centre land use survey.

*Close proximity will be defined on a case-by-case basis due to the difference in the topography and layout of the town centres.

5.28 These control mechanisms will be transferred to the Local Development Plan through a Development Management policy. Table 9 sets out the percentage and number of hot food takeaway establishments and public houses based on the revised town centre boundaries (see Table 13 and Appendix 2). and results of the 2009 Blaenau Gwent Town Centre Survey. This data guides the proposed thresholds for the Development Management Policy.

Table 9: The Number of Hot Food Takeaway Establishments and Public Houses based on the Proposed LDP Town Centre Boundaries

Retail Centre	Hot Food Takeaway Establishments	Public Houses
Ebbw Vale	6.9% (8)	2.6% (3)
Tredegar	7.7% (12)	2.6% (4)
Brynmawr	9.3% (10)	3.7% (4)
Abertillery	8.4% (11)	5.3% (7)
Blaina	9.1% (5)	3.6% (2)

The number in the bracket denotes the number of ground floor units
Source: Blaenau Gwent CBC Retail Surveys (2009)

5.29 Taking into account these figures, it is proposed that the number of hot food takeaway establishments should be equal to or no greater than 7.0% of the total number of retail units/ buildings in the town centre and the number of public houses should be equal to or no greater than 4.0% of the total number of retail units/ buildings in the town centre. These thresholds will be included in a Development Management Policy. Supplementary Planning Guidance will also be produced to provide clarity on these thresholds and detailed technical advice relating to hot food takeaways and public houses.

6.0 MEASURES OF VITALITY AND VIABILITY

6.1 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 Council collects in depth information on the five retail centres, Abertillery, Blaina, Brynmawr, Ebbw Vale and Tredegar and commissioned CACI studies on all five centres.

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

CACI Study

6.3 In 2006 the County Borough Council commissioned CACI to undertake studies of Abertillery, Brynmawr, Ebbw Vale and Tredegar, and later in 2008 Blaina, 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.

Shopper Attitude Surveys

6.4 As part of the Heads of the Valleys Town Centre Study, a Shopper Attitude Survey was undertaken in 11 of the town centres and two retail centres within the Heads of the Valleys Programme Area. The towns targeted in Blaenau Gwent were: Abertillery, Brynmawr, Ebbw Vale and Tredegar. The Ebbw Vale Garden Festival Shopping Outlet was also targeted.

6.5 The analysis of the Shopper Attitude Survey can be found in the 5 stand alone reports on the Council's website.

6.6 The main requirements of the surveys have been to:

- Establish where and how often residents and visitors shop for their food and non-food purchases within the County Borough;
- Establish for what reasons residents and visitors visited the shopping centres of the County Borough;
- Establish attitudes of shoppers towards the retail centres of the area; and
- Determine the means of transport used by shoppers.

6.7 In order to obtain this information the following surveys were undertaken:

(1) A County Borough wide random telephone survey of 3,250 households, across weekdays, evenings and weekends; and

(2) A shopper/visitor survey within the town centres of Abertillery, Brynmawr, Ebbw Vale and Tredegar and the Ebbw Vale Garden Festival Shopping Outlet Centre. The 2,630 surveys were completed across the centres during the period 10th November – 9th December 2008.

Telephone Surveys

6.8 There is a wealth of information available in the raw data, but for the purposes of this background paper, the report concentrates on those issues considered to be the most important.

6.9 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; and
- The resident approval rating of the 4 town centres in the County Borough as places in which to go shopping

Street Interviews

6.10 The on-street interviews were conducted in batches of 25 interviews at appropriate points in each shopping centre and were carried out from Mondays to Saturdays, which included days with the heaviest footfall. Approximately 200 interviews were undertaken in each of the 5 shopping centres.

6.11 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; and
- The dislikes about the centre.

EBBW VALE

6.12 Ebbw Vale is the largest town centre within Blaenau Gwent's five town centres. Whilst the local town wards have a population of 8,944 (2001 Census) the Ebbw Vale area has a total population of 23,622 which includes communities such as Rassau, Beaufort, etc. Due to its strategic focus for Council services, education, and leisure and more recently with the opening of the new hospital on the Works site, the town centre has a key role to play in providing shopping and other services for its residents. Investment in the rail link to Newport and Cardiff, dualling of the Heads of the Valleys road corridor and the ongoing redevelopment of the former Corus Steelworks, known as the Works, provide major opportunities for Ebbw Vale.

Ebbw Vale CACI Study

6.13 CACI's Retail Footprint Model classifies Ebbw Vale 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) to travelling to an alternative centre. Rural Centres tend to be large enough to support the basic needs of a local catchment.

6.14 Ebbw Vale's market size places it in Retail Footprint's 'Rural Centres' Minor Class. Ebbw Vale is ranked as 6th in the Welsh ranking of Rural Centres and 61st in the UK ranking of rural centres. Other examples of Rural Centres include Blackwood and Monmouth.

Key Findings of the Ebbw Vale CACI Study:

- CACI's Retail Footprint model shows that Ebbw Vale's retail catchment contains 273, 698 residents with annual total expenditure of £573. 9 million.
- Ebbw Vale's town centre captures 7.5% of this expenditure, representing £42.8 million of comparison spend per annum.
- In the core catchment (where 75% of shoppers originate) Ebbw Vale's market share is 34%. Within the primary catchment alone (where 50% of shoppers originate), Ebbw Vale's market share is 48%.
- The total Clothing and Footwear market in Ebbw Vale is worth an estimated £13.7 million per annum, representing 15.8% of total expenditure potential. Spend on durable goods also makes a significant contribution to annual expenditure (£11.0 million or 12.8% of potential expenditure).
- In the national ranking of Retail Footprint town centres, Ebbw Vale is ranked 671st. In the ranking of Welsh town centres, Ebbw Vale is in 38th place, ahead of Cardigan, Pontypool and Brecon.
- Ebbw Vale town is under provided in terms of comparison good retailers relative to its size of catchment population.

Ebbw Vale Shopper Attitude Surveys:

Main findings of the Ebbw Vale Household Telephone Survey for Ebbw Vale

- Respondents living in the Ebbw Vale area identified a large number of different stores which they visited to purchase their food and grocery items. Over two fifths of respondents (41.6%) listed Tesco, North West Approach in Ebbw Vale. This response fell under the 'other' responses as the store where the respondents buy the majority of their household food and grocery items. The second most popular store/location was Morrisons in Ebbw Vale and named by over a quarter (28.8%) of respondents.

- Ebbw Vale Town Centre was the most popular location to purchase non-food items, with over a quarter (26%) visiting the town for this purpose. Cardiff city centre (22%) was the second most popular town to purchase the majority of their non-food items.
- The survey found that 88.8% of all respondents surveyed visit Ebbw Vale town centre for shopping. The 222 respondents who indicated that they visited Ebbw Vale stated a number of reasons for visiting their local area for shopping. Nearly three fifths of the respondents (57.7%) stated it was because it was close and / or convenient to home.
- All respondents within the catchment area of Ebbw Vale were then asked what would make them use Ebbw Vale more frequently. The most popular response stated by two-fifths (40%) was that respondents would prefer to have better choice/range of non-food shops. Nearly a tenth (9.2%) said that a better choice/range of food shops encourage them to use Ebbw Vale for shopping more frequently.
- The results of this survey have suggested that the attractiveness of the town, car parking, traffic and public transport issues do not appear to be main concerns to the respondents.
- Nearly half of respondents (48.4%) stated that they rate the town as either "not very favourable" or "not at all favourable." A quarter of all respondents viewed the town as "very favourable" or "fairly favourable".

Main findings of the Ebbw Vale On-Street Survey:

- The most popular reason for over a third (39.6%) of respondents' visits to Ebbw Vale town centre is for non-food shopping. Food and grocery shopping was the second highest response, with 16.4% stating this as the main purpose of their visit. The third most popular reason for respondents visiting the town was for browsing and window shopping (10.13%).
- Collectively, those visiting Ebbw Vale for shopping equates for nearly three fifths of all respondents (56%).
- The most popular method of transport to the town was by car / van as the driver, as almost a third of all respondents stated this (32.9%). Whereas, over a quarter (29%) of respondents travelled to the town on foot.
- The majority of respondents (53.6%) stated that they had spent or were likely to spend between £0 and £20 during their visit, this comprised of 30.9% indicating they would be spending/ have spent less than £10 and 22.7% stating somewhere between £11 and £20.
- The location and convenience of Ebbw Vale was the aspect that respondents rated as either "very good" or "good" (combined responses – 90.3%), another high proportion (88.9%) of respondents indicated the presence of bank/building societies as "very good" or "good".
- Negative responses include the range of shops which over two thirds (44.9%) of respondents rated as either "poor" or "very poor" and the choice of shops which nearly half of the respondents rated as "poor" or "very poor" (47.3%).

- A better choice / range of non-food and food shops (36.2%) and (52.2%) respectively were the most popular responses given by on-street interviewees when asked what improvements they would particularly prefer in Ebbw Vale to encourage them to visit the area more often and improve their day out experience.

EBBW VALE FESTIVAL FACTORY OUTLET CENTRE

6.15 The Ebbw Vale Festival Park Factory Outlet Centre opened in 1997. It provides a distinct form of retailing that draws trade from a sub regional catchment.

Ebbw Vale Festival Factory Outlet Centre CACI Study

Key Findings of the Ebbw Vale Festival Factory Outlet Centre CACI Study:

- CACI's retail footprint model shows that Ebbw Vale Festival Factory Outlet Centre's retail catchment contains 967,912 residents with annual total expenditure of £2,129.4 million.
- The Factory Outlet Centre captures 2.5% of this expenditure, representing £54.1 million of comparison spend per annum.
- In the core catchment (where 75% of shoppers originate) the Factory Outlet Centre's market share is 7.1%. Within the primary catchment (where 50% of shoppers originate), the Factory Outlet Centre's market share is 12%.
- The total clothing and footwear market in the factory outlet centre is worth an estimated £16.9 million per annum, representing 15.7% of total expenditure potential. Spend on durable goods and leisure goods also makes a significant contribution to annual expenditure (£14.1 million or 13.1% of potential expenditure and £10.1 million or 9.4% potential expenditure respectively).
- In the national ranking of factory outlet centres, Ebbw Vale Festival Park Outlet Centre is ranked 28th. In the Welsh ranking, Ebbw Vale Festival Park Outlet Centre is ranked 2nd place, behind the Bridgend McArthurGlen Outlet Centre.
- Ebbw Vale Festival Park Outlet Centre has a good provision of sportswear and equipment retailers. However there are opportunities to improve the provision of mass multiple fashion retailers and goods for leisure pursuits to link to nearby tourist attractions.

Ebbw Vale Festival Factory Outlet Centre Shopper Attitude Surveys

Main findings of the Ebbw Vale Festival Factory Outlet Centre Household Telephone Survey:

- Nearly a third of respondents (32.8%) listed Tesco, North West Approach in Ebbw Vale as the store where they buy the majority of their household food and grocery items. The second most popular store/location was Morrisons, Beaufort Road in Ebbw Vale which was named by over a quarter (27.6%) of respondents.
- In terms of locations to purchase non-food items, Cardiff was the most popular location with over a quarter (28.4%) visiting this area. Ebbw Vale town centre was the second most popular area. Festival Park, Ebbw Vale

was stated by 4.8% to purchase the majority of their non-food items of which fell under the 'Other' responses indicated.

- Respondents were prompted with a list of stores/locations and asked to state whether they had used or visited these stores for any purpose. When prompted, the majority of the respondents had visited Asda in Brynmawr (72.8%) and Cyfartha Retail Park, Merthyr Tydfil (66.0%), whereas over a tenth (15.2%) indicated they had not used/visited these stores/locations for any other purpose.
- The survey found that 86.4% of all respondents surveyed visit the factory outlet centre for shopping. The 216 respondents who indicated that they visited the Factory Outlet Centre stated it was because it was close and/or convenient to home (37.0%) and there is a good choice of non-food shops (29.2%).
- All respondents within the catchment area of Festival Park Outlet Centre were then asked what would make them visit the area more frequently. The most popular response stated by under a third (30.4%) was that respondents would prefer to have better choice/range of non-food shops. Less than a tenth said that a better choice/range of food shops would make them use the centre for shopping more frequently.
- Over half (54.8%) of respondents rated the centre as either 'very favourable' or 'fairly favourable', conversely 14.4% of all respondents felt the centre was either 'not very favourable' or 'not at all favourable'.

Main findings of the Ebbw Vale Festival Factory Outlet Centre On- Street Survey:

- The most popular reason for over three fifths (62.7%) of respondents visits to the Ebbw Vale Festival Factory Outlet Centre is for non-food shopping. Browsing/window shopping was the second highest response with 31.3% stating this as the main purpose of their visit.
- Collectively, those visiting the outlet centre for shopping equates for nearly two-thirds of all respondents (64.2%).
- The most popular method of transport was by car/van, with the vast majority (96.5%) of all respondents stating this and only 2% using public transport.
- The largest group of respondents (40.3%) stated that they had or were likely to spend more than £40 during their visit. 18.4% indicated that they would be spending/have spent between £41-£60; 8.0% between £61-£80; 10.0% between £81-£100; and 4% stating over £101.
- The convenient parking at the outlet centre was the aspect that the respondents rated as either 'very good' or 'good' (combined responses - 99.0%), another high proportion (97.5%) of respondents rated access by car as also 'very good' or 'good'.
- Negative responses include the choice and quality of places to eat/drink (21.4% and 14.9% respectively) which the respondents rated as 'very poor' or 'poor'.
- A better range of non-food and food shops (18.9% and 15.4% respectively) were the most popular responses given by on-street interviewees when asked what improvements they would particularly prefer in the outlet centre to encourage them to visit the area often and improve their day out experience. However, a large proportion felt the area did not require any improvements which was stated by 57.2% of respondents.

TREDEGAR

6.16 Tredegar is located at the head of the Sirhowy valley in the north western corner of Blaenau Gwent. It has a town population of 3,700 (2001 Census) (central and west wards) with the wider Tredegar area having a population of 15,057 residents. The town centre is the second largest town centre in terms of floorspace, which is partly due to the presence of Gwent Shopping Centre.

Tredegar CACI Study

6.17 CACI's Retail Footprint Model classifies Tredegar 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) to travelling to an alternative centre. Rural Centres tend to be large enough to support the basic needs of a local catchment.

6.18 Tredegar's market size places it in Retail Footprint's 'Rural Centres' Minor Class. Tredegar is ranked as 24th in the Welsh ranking of Rural Centres and 154th in the UK ranking of rural centres. Other examples of Rural Centres include Blackwood and Monmouth.

Key Findings of the Tredegar CACI Study:

- CACI's Retail Footprint model shows that Tredegar's retail catchment contains 226,550 residents with annual total expenditure of £469.8 million.
- Tredegar's town centre captures 5% of this expenditure, representing £23.1 million of comparison spend per annum.
- In the core catchment (where 75% of shoppers originate) Tredegar's market share is 18%. Within the primary catchment alone (where 50% of shoppers originate), Tredegar's market share is 30%.
- The total Clothing and Footwear market in Tredegar is worth an estimated £7.4 million per annum, representing 15.7% of total expenditure potential. Spend on durable goods also makes a significant contribution to annual expenditure (£6.0 million or 12.7% of potential expenditure).
- In the national ranking of Retail Footprint town centres, Tredegar is ranked 1,037th. In the ranking of Welsh town centres, Tredegar is in 68th place, ahead of Bargoed and Porthcawl.
- Tredegar offers clear opportunities for improving comparison goods retailer provision, both independent stores and national multiple retailers.

Tredegar Shopper Attitude Surveys

Main findings of the Household Telephone Survey for Tredegar:

- Respondents living in the Tredegar area visited a large number of different stores to complete their main food shop. Two fifth of respondents (40.0%) listed Morrisons, Ebbw Vale as the store in which they buy the majority of their household food and grocery items. The second most popular store / location fell under the 'Other' responses – Tesco, North West Approach in Ebbw Vale and named by just under one-fifth (19.2%) of respondents. The third most popular store was Asda, Dowlais Top in Merthyr Tydfil, with 11.8% stating their preference to complete their main food shop at this store.

- When reviewing respondents who shopped within their catchment area, under a fifth (18.0% - combined responses) stated stores within Tredegar, citing Lidl, Aldi and Farmfoods all located in the town centre.
- In terms of locations to purchase non-food items, Cardiff was the most popular location, with over a quarter (28.8%) visiting the city. Merthyr Tydfil Town Centre (22.4%) was the second most popular area. Tredegar Town Centre was stated by 6.8% to purchase the majority of their non food items.
- The survey found that that 81.6% of all respondents surveyed visit Tredegar for shopping. Those respondents who indicated that they visited Tredegar (204 respondents) stated a number of reasons for visiting their local area for shopping. Nearly three quarters of the respondents (74.0%) stated it was because it was close and/or convenient to home.
- All respondents within the catchment area of Tredegar were then asked what would make them visit the area more frequently. The most popular response stated by over two-fifths (42.8%) was that respondents would prefer to have a better choice/range of non-food shops. Just under a fifth (16.0%) stated that a better choice/range of food shops would make them use Tredegar for shopping more frequently.
- Nearly three quarters (72.0%) of respondents stated that they rate the town as either ‘not very favourable’ or ‘not at all favourable,’ conversely only 11.6% of all respondents felt the town was either ‘very favourable’ or ‘fairly favourable’.

Main findings of the Tredegar On-Street Survey:

- The most popular reason for over a third (39.5%) of respondents’ visits to Tredegar town centre was for food and grocery shopping. Non-food shopping was the second largest response, with a third of all respondents (33.2%) stating this as the main purpose of their visit. The third most popular reason is for work and business (10.7%).
- The majority of respondents (68.3%) stated that they had spent, or were likely to spend, between £0 and £20 during their visit. 43.9% indicated that they would be spending/ had spent less than £10, with a further quarter (24.4%) stating somewhere between £11 and £20.
- Tredegar’s location and convenience was the aspect that was most liked about the area (71.7%) for shopping, leisure/evening activities or services.
- “A better range of food and non-food shops” (80.0% and 69.8% respectively) were the most popular response given by on-street interviewees when asked what improvements they would particularly prefer in Tredegar to encourage them to visit Tredegar more often and improve their day out experience. A “more attractive environment” was also a common theme, as nearly half of respondents (45.4%) stated that an important improvement would be a “more attractive environment”.

BRYNMAWR

6.19 Brynmawr is located in the Upper Ebbw Fach Valley. It is the fourth largest town in the County Borough behind Ebbw Vale, Tredegar and Abertillery. The catchment for the town includes Brynmawr, Nantyglo and Blaina and has a combined population of 14,772 residents (2001 Census).

Brynmawr CACI Study

6.20 CACI's Retail Footprint Model classifies Brynmawr 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) to travelling to an alternative centre. Rural Centres tend to be large enough to support the basic needs of a local catchment.

6.21 Brynmawr is ranked as 58th in the Welsh ranking of Rural Centres and 316th in the UK ranking of rural centres. Other examples of Rural Centres include Blackwood and Monmouth.

Key Findings of the Brynmawr CACI Study:

- CACI's Retail Footprint model shows that Brynmawr's retail catchment contains 104,322 residents with annual total expenditure of £216.4 million.
- Brynmawr's town centre captures 3% of this expenditure, representing £6.1 million of comparison spend per annum.
- In the core catchment (where 75% of shoppers originate) Brynmawr's market share is 8%. Within the primary catchment alone (where 50% of shoppers originate), Brynmawr's market share is 11%.
- The total Clothing and Footwear market in Brynmawr is worth an estimated £1.9 million per annum, representing 15.7% of total expenditure potential. Spend on durable goods also makes a significant contribution to annual expenditure (£1.6 million or 12.7% of potential expenditure).
- In the national ranking of Retail Footprint town centres, Brynmawr is ranked 1,840th. In the ranking of Welsh town centres, Brynmawr is in 129th place.
- Brynmawr offers opportunities to hold craft markets and Christmas markets for example to diversify the offer and create draw. Asda and other retailers on the edge of town increase competition for comparison goods retailers.

Brynmawr Shopper Attitude Surveys

Main findings of the Brynmawr Household Telephone Survey:

- Respondents living in the Brynmawr area visited a large number of different stores to complete their main food shop. Over half of respondents (53.2%) named Asda in Nantyglo/Brynmawr as the store where they buy the majority of their household food and grocery items. The second most popular store location was Morrisons, Ebbw Vale which was named by over a tenth (11.6%) of respondents.
- Nearly three quarters of respondents (73.6%) indicated that they carry out a top up food and convenience shop in addition to their main food shopping. The most popular store / location visited for top-up shopping as well as for main food was Asda in Nantyglo/Brynmawr. 51.6% of respondents named other local convenience stores such as local stores in Brynmawr (14.7%) and Gilwern (10.9%) as places they visited to carry out top up shopping.
- In terms of locations to purchase non-food items, Cardiff (20%) was the most popular location for non-food items. Abergavenny (17.6%) was the second most popular and Brynmawr Town Centre (9.6%) being the third most popular town.

- 71.2% of all respondents surveyed visit Brynmawr for their shopping. 178 of respondents who visited Brynmawr for their shopping stated a number of reasons why. The most popular reason was due to the closeness and or convenience to their home (58.4%).
- All respondents within the catchment area of Brynmawr were then asked what would make them visit the area more frequently. Over a quarter of respondents (27.6%) would prefer to have better choice/range of non-food shops.
- The results of the telephone survey have suggested that the attractiveness of the town, car parking, traffic and public transport issues do not appear to be the main concerns to the respondents; it is more to do with factors such as choice and range of non-food shopping.
- 50% of respondents stated that they rate the town as either “not very favourable” or “fairly favourable.” Over a quarter (28.8%) of respondents felt the town was either “very favourable” or “fairly favourable”.

Main findings of the Brynmawr On Street Survey:

- The most popular reason for over a third (31.3%) of respondents’ visits to Brynmawr was for food and grocery shopping. Non-food shopping was the second largest response, with 14.4% of respondents stating this as the main purpose of their visit. The third most popular reason is for work and business (11.4%).
- Collectively, 45.8% of respondents visit Brynmawr for shopping this equates to under half of all respondents.
- The most popular method of transport to Brynmawr was on foot (44.3%) with under a third (27.9%) having travelled by car / van as the driver or passenger.
- The majority of respondents (74.1%) stated that they had or were likely to spend between £0 and £20 during their visit, this comprised of 60.2% of respondents indicating that they would be spending / have spent less than £10 and 13.9% of respondents stating somewhere between £11 and £20.
- The majority of respondents rated the location / convenience of Brynmawr as either “very good” or “good” (combined responses – 91%). Another high proportion of respondents (88.6%) indicated that personal safety was “very good” or “good”. However, the majority of respondents (80.1%) stated the market was either “poor” or “very poor”, and rated the choice of shops (68.7%) as either “poor” or “very poor”.
- When asked what improvements would encourage them to visit this area more often and improve their day out experience a better choice / range of food and non-food shops (77.6% and 60.7% respectively) were the most popular responses given.

ABERTILLERY

6.22 Abertillery is located in the Lower Ebbw Fach Valley. It is the third largest town in the County Borough behind Ebbw Vale and Tredegar. The catchment for the town includes Cwmtillery, Abertillery, Six Bells and Llanhilleth and has a combined population of 16,663 residents (2001 Census).

Abertillery CACI Study

6.23 CACI's Retail Footprint Model classifies Abertillery 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) to travelling to an alternative centre. Rural Centres tend to be large enough to support the basic needs of a local catchment.

6.24 Abertillery is ranked as 26th in the Welsh ranking of Rural Centres and 157th in the UK ranking of rural centres. Other examples of Rural Centres include Blackwood and Monmouth.

Key Findings of the Abertillery CACI Study:

- CACI's Retail Footprint model shows that Abertillery's retail catchment contains 191,302 residents with annual total expenditure of £405.1 million.
- Abertillery's town centre captures 6% of this expenditure, representing £22.5 million of comparison spend per annum.
- In the core catchment (where 75% of shoppers originate) Abertillery's market share is 37%. Within the primary catchment alone (where 50% of shoppers originate), Abertillery's market share is 47%.
- The total Clothing and Footwear market in Abertillery is worth an estimated £7.1 million per annum, representing 15.6% of total expenditure potential. Spend on durable goods also makes a significant contribution to annual expenditure (£5.8 million or 12.8% of potential expenditure).
- In the national ranking of Retail Footprint town centres, Abertillery is ranked 1,057th. In the ranking of Welsh town centres, Abertillery is in 71st place.
- Abertillery offers opportunities to improve the retail provision in the Arcade and to possibly attract some good independent retailers to make it a feature and encourage through flow.

Abertillery Shopper Attitude Surveys

Main findings of the Abertillery Household Telephone Survey

- Respondents living in the Abertillery area visited a large number of different stores to complete their main food shop. Over a third of respondents (34.0%) named Asda in Nantyglo / Brynmawr as the store where they buy most of their household food and grocery items. The second most quoted store was the Tesco Store in Abertillery, which was listed by nearly a third of respondents (30.8%).
- 69.9% of respondents indicated that they carry out a top up food and convenience shop in addition to their main food shopping. The most popular store / location visited for top-up shopping was Tesco in Abertillery (24.7%). The second most popular store was Somerfield in Abertillery named by nearly a fifth of respondents (17.2%). The third most quoted store was a local store in Abertillery (16.7%), of which this response fell under the 'other' category.
- In terms of locations to purchase non-food items, Cwmbran Shopping Centre (28.4%) was the most popular location for non-food items. Newport (17.2%) was the second most popular and Cardiff (14.8%) being the third most popular town.
- The survey has found that 78.8% of all respondents surveyed visit Abertillery for their shopping. 197 respondents who visited Abertillery for their shopping

stated a number of reasons why. The most popular reason was due to the closeness and or convenience to their home (56.3%).
- All respondents within the catchment area of Abertillery were then asked what would make them visit the area more frequently. Over a third of respondents (39.6%) would prefer to have better choice/range of non-food shops.
- The results of the telephone survey have suggested that the attractiveness of the town, car parking, traffic and public transport issues do not appear to be the main concerns to the respondents; it is more to do with factors such as choice and range of non-food shopping.
- Over two thirds (67.2%) of respondents stated that they rate the town as either "not very favourable" or "not at all favourable." Only 12% rated the town centre as either" very favourable" or "fairly favourable".

Main findings of the Abertillery On Street Survey:
- The most popular reason for nearly a third (30.7%) of respondents' visits to Abertillery was for non-food shopping. Food and grocery shopping was the second largest response, with 23.3% of respondents stating this as the main purpose of their visit. The third most popular reason is for work and business (20.3%).
- Collectively, those visiting Abertillery for shopping equates for over half of all respondents (54%).
- The most popular method of transport to Abertillery Town Centre was on foot (49.5%), with just over a quarter (27.7%) of respondents travelling by car/van.
- The majority of respondents (62.9%) stated that they had or were likely to spend between £0 and £20 during their visit, this comprised of 43.6% of respondents indicating that they would be spending / have spent less than £10 and 19.3% of respondents stating somewhere between £11 and £20.
- A high proportion of respondents (90.1%) rated the presence of banks / building societies in Abertillery as either "very good" or "good." Another high proportion of respondents indicated that the cost of car parking was "very good" or "good".
- However, a large proportion of respondents (86.1%) stated that the range of shops was either "poor" or "very poor" and the choice of shops was also seen as either "poor" or "very poor" by 84.2% of respondents. This was also confirmed when the respondents were asked what improvement would encourage them to visit Abertillery more often and improve their day out experience, a better choice/range of non-food and food shops (91.1% and 80.2% respectively were the most popular responses given.

BLAINA

6.25 The town of Blaina has a population of 4,830 (2001 Census) with the main town centre situated on the eastern side of the A467 in the Ebbw Fach valley. It is the smallest of the five town centres within Blaenau Gwent, positioned between Brynmawr and Abertillery.

Blaina CACI Study

6.26 CACI's Retail Footprint Model classifies Blaina 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) to travelling to an alternative centre. Rural Centres tend to be large enough to support the basic needs of a local catchment.

6.27 Blaina is ranked as 100th in the Welsh ranking of Rural Centres and 562nd in the UK ranking of rural centres.

Key Findings of the Blaina CACI Study:

- CACI's Retail Footprint model shows that Blaina's retail catchment contains 30,053 residents with annual total expenditure of £59,290.
- Blaina's town centre captures 2% of this expenditure, representing £213 of comparison spend per annum.
- In the core catchment (where 75% of shoppers originate) Blaina's market share is 1%. Within the primary catchment alone (where 50% of shoppers originate), Blaina's market share is 2%.
- The total Clothing and Footwear market in Abertillery is worth an estimated £120 per annum, representing 15.6% of total expenditure potential. However, spend on convenience makes the greatest contribution to annual expenditure (£380 or 41.6% of potential expenditure).
- In the national ranking of Retail Footprint town centres, Blaina is ranked 2,840th. In the ranking of Welsh town centres, Blaina is in 198th place.
- There are opportunities to attract service operators into the town in order to attract footfall to the town. The services that are currently on offer in the town such as the post office and Co-operative supermarket should be marketed.

Table 10A: Vacancy Rates

Centre	A1	A2	A3	B1	B8	C3	D1	D2	SG	Vacant	Total
Ebbw Vale	46.8% (65)	14.4% (20)	12.2% (17)	0.7% (1)	0.7% (1)	4.3% (6)	2.9% (4)	0% (0)	6.5% (9)	11.5% (16)	139
Tredegar	44.1% (75)	11.8% (20)	14.1% (24)	0.6% (1)	0% (0)	6.4% (11)	3.5% (6)	0.6% (1)	6.5% (11)	12.4% (21)	170
Brynmawr	32.3% (50)	11.6% (18)	13.5% (21)	0% (0)	0% (0)	21.9% (34)	1.3% (2)	1.3% (2)	6.5% (10)	11.6% (18)	155
Abertillery	30.2% (48)	12.6% (20)	14.5% (23)	1.3% (2)	0% (0)	15.1% (24)	0.6% (1)	1.3% (2)	4.4% (7)	20% (32)	159
Blaina	26.9% (17)	3.2% (2)	19.1% (12)	0% (0)	0% (0)	20.6% (13)	1.6% (1)	1.6% (1)	3.2% (2)	23.8% (15)	64

The number in the bracket denotes the number of ground floor units
Source: Blaenau Gwent CBC Retail Surveys (July 2009)

6.28 The vacancy rates in Table 10A above give another measure of vitality of retail centres. It can be seen that the smaller centre of Blaina has a higher vacancy rate than in the four larger centres with nearly a quarter of all ground floor units being vacant and its relative health is therefore a cause for concern, as is Abertillery.

6.29 The following tables provide an update to the information contained in Table 10A to reflect the results of the Blaenau Gwent CBC Retail Surveys undertaken in July 2010 and July 2011.

Table 10B: Results of the Blaenau Gwent Retail Surveys undertaken in July 2010

Centre	A1	A2	A3	B1	B8	C3	D1	D2	SG	Vacant	Total
Ebbw Vale	46.1% (64)	12.3% (17)	12.9% (18)	0.7% (1)	0.7% (1)	5.0% (7)	2.9% (4)	0% (0)	5.8% (8)	13.6% (19)	139
Tredegar	42.1% (72)	11.8% (20)	14.0% (24)	0.6% (1)	0% (0)	6.4% (11)	4.1% (7)	0.6% (1)	6.4% (11)	14.0% (24)	171
Brynmawr	33.8% (52)	10.4% (16)	13% (20)	0% (0)	0% (0)	22.1% (34)	1.3% (2)	1.3% (2)	5.8% (9)	12.3% (19)	154
Abertillery	30.8% (49)	11.3% (18)	16.3% (26)	1.3% (2)	0% (0)	12.6% (20)	1.3% (2)	0% (0)	5.0% (8)	21.4% (34)	159
Blaina	24.6% (15)	3.3% (2)	16.4% (10)	0% (0)	0% (0)	19.7% (12)	1.6% (1)	1.6% (1)	3.3% (2)	29.5% (18)	61

The number in the bracket denotes the number of ground floor units
Source: Blaenau Gwent CBC Retail Surveys (July 2010)

Table 10C: Results of the Blaenau Gwent Retail Surveys undertaken in July 2011

Centre	A1	A2	A3	B1	B8	C3	D1	D2	SG	Vacant	Total
Ebbw Vale	49% (68)	10.8% (15)	14.4% (20)	0.7% (1)	0.7% (1)	4.3% (6)	2.9% (4)	0% (0)	6.5% (9)	10.7% (15)	139
Tredegar	42.7% (73)	10.5% (18)	12.9% (22)	0.6% (1)	0% (0)	7.0% (12)	3.5% (6)	0.6% (1)	6.4% (11)	15.8% (27)	171
Brynmawr	32.5% (50)	8.4% (13)	13% (20)	0% (0)	0% (0)	22.1% (34)	1.3% (2)	1.3% (2)	5.8% (9)	15.6% (24)	154
Abertillery	31% (49)	10% (16)	16.5% (0)	1.3% (2)	0% (0)	12.7% (20)	1.9% (3)	0% (0)	5.1% (8)	21.5% (34)	158
Blaina	19.7% (12)	3.3% (2)	19.7% (12)	0% (0)	0% (0)	19.7% (12)	1.6% (1)	1.6% (1)	9.8% (6)	24.6% (15)	61

The number in the bracket denotes the number of ground floor units
Source: Blaenau Gwent CBC Retail Surveys (July 2011)

6.30 The trend continues that Blaina has the higher vacancy rate than in the other four larger centres with a quarter of all ground floor units being vacant in 2011. It is also important to note that the number of A1 properties have declined from 26.9% in 2009 to 19.7% in 2011. The relative health of Blaina town centre therefore remains a cause for concern.

Pedestrian Flows

6.31 Pedestrian counting machines were installed and operational in Ebbw Vale, Tredegar, Brynmawr and Blaina Town Centres during February 2008. The pedestrian counting machine in Abertillery was installed in February 2008 but was not operational until December 2008.

6.32 Over the period April 2009 to March 2010 the following data was collected:

- In Ebbw Vale, the weekly average was 18,032 movements. Apart from the pre Christmas rush and the January lull, the lowest and highest figures were 24,053 and 13,055 respectively.
- In Tredegar, the weekly average was 10,139 movements. Apart from the pre Christmas rush and the January lull, the lowest and highest figures were 18,313 and 6,306 respectively.
- In Brynmawr, the weekly average was 14,328 movements. Apart from the pre Christmas rush and the January lull, the lowest and highest figures were 16,941 and 8,185.

- In Abertillery, the weekly average was 17,819 movements. Apart from the pre Christmas rush and the January lull, the lowest and highest figures were 21,977 and 13, 948.
- In Blaina, the weekly average was 6,003 movements. Apart from the pre Christmas rush and the January lull, the lowest and highest figures were 8,534 and 4,288. Blaina's retail offer is not as attractive or extensive as the other four centres, which explains the lower footfall. This reaffirms that Blaina needs a different retail approach to enhance this position than that proposed for the other four centres.

Conclusions

6.33 The shopper attitude survey information and the CACI studies confirm a clear hierarchy of centres. Ebbw Vale is a higher order centre with wider catchment, gaining from a higher level of comparison goods purchases but being less dependent on walk in trade and probably benefiting from less frequent but higher spending visits. Blaina exhibits features of a more local centre whilst Tredegar, Brynmawr and Abertillery are somewhere between the two types.

6.34 The main theme to emerge from the Shopper Attitude Surveys in every town centre was the need to encourage a better choice of food and non-food shops. The CACI study identified that there are opportunities, in each of the 5 retail areas, to enhance the quality of the retail offer, through attracting good independent retailers and enhancing the quality of the retail accommodation and retail environment.

7.0 REVIEW OF CURRENT RETAIL DESIGNATIONS

7.1 Current designations originate from the adopted Development Plan – The Blaenau Gwent Unitary Development Plan (UDP), which was adopted in July 2006. These designations have been reviewed taking into account data on changes of use and vacancy rates.

The Retail Hierarchy

7.2 Planning Policy Wales Edition 4 (February 2011) states that Development Plans should establish the existing hierarchy of centres, identify those, which fulfil specialist functions, and be clear about their future roles. Therefore 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.

7.3 The Unitary Development Plan identified five Central Shopping Areas in Blaenau Gwent namely; Abertillery, Blaina, Brynmawr, Ebbw Vale and Tredegar. The retailing aim of the Unitary Development Plan is to create a framework to protect and enhance the central shopping areas to be the focus of shopping, cultural, commercial, social and leisure activity. No retail hierarchy was identified.

7.4 In line with national planning policy, the Local Development Plan proposes a retail hierarchy which seeks to define each particular type of retailing area and considers future roles for the town centres.

7.5 Planning Policy Wales Edition 4 (February 2011) provides national planning policy guidance on retail and uses suitable for town centres in the context of town, district, local and village centres. These categories have been taken into account when preparing a retail hierarchy for Blaenau Gwent. To acknowledge the role of Ebbw Vale in the Wales Spatial Plan as a key settlement that has a critical role to play in the success of the Capital Region, a higher-level category named Principal Town Centre has been created.

7.6 National planning Guidance in Wales does not specifically offer advice on how to differentiate one category from another. Guidance has therefore been adapted from Planning Policy Statement 6 (ODPM, 2005) and used in conjunction with the centre categories outlined in Planning Policy Wales.

7.7 Table 11 explains the rationale behind the formulation of the retail hierarchy.

Table 11: The Retail Hierarchy

Level of Centre	Criteria	Applicable to:
Principal Town Centres	Provides a range of facilities and services similar to a town centre but for a wider sub regional catchment. The centre will be an important centre in a local authority's area providing a range of facilities. This will comprise groups of shops often containing at least one supermarket or superstore, and a range of non retail uses, such as banks, building societies and restaurants, as well as local public facilities such as a library.	Ebbw Vale
District Town Centres	District Town Centres usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library. Consequently they are generally more commercial in nature and draw comparatively larger number of shoppers than Local Town Centres	Tredegar Brynmawr Abertillery

Level of Centre	Criteria	Applicable to:
Local Town Centres	Local Town Centres are generally smaller in size and variety of uses and are more likely to retain a residential character. Typically, a Local Town Centre may include, amongst other shops, a small supermarket, a newsagent, a post office and a pharmacy. Other facilities could include hot food takeaways and a laundrette.	Blaina
Neighbourhood Centres	Local shops play a vital role in sustaining smaller neighbourhood centres and reducing the need for residents to travel to meet everyday needs. Neighbourhood centres may typically include a small convenience shop, newsagents and sub post office.	Beaufort, Ebbw Vale Cwm, Ebbw Vale Rassau, Ebbw Vale Hilltop, Ebbw Vale Ashvale, Tredegar Llanhilleth, Lower Ebbw Fach Brynithel, Lower Ebbw Fach Six Bells, Lower Ebbw Fach

7.8 Data from the annual town centre health checks has also been used to assist with the defining of the retail hierarchy, particularly with regard to the number of units and the percentage of vacant units within the central shopping area boundaries. The data for the named Principal and District Town Centres reflect the larger town centres, with the number of ground floor units within the town centre boundary being 139 units or more (Table 10). Blaina Local Town Centre is half the size with only 64 units within the town centre boundary.

7.9 During pre-deposit consultation, stakeholders and residents have identified the future role of Town Centres as a key issue for the Local Development Plan. The Plan will seek to identify roles for each of the Principal, District and Local Town Centres.

7.10 The Principal Town Centre of Ebbw Vale is expected to perform a sub regional retail role. It is proposed that Ebbw Vale will be the main retail centre where the emphasis will be on a good balance between comparison (non-food) and convenience (food) shopping. Ebbw Vale will be the focus of service provision in Blaenau Gwent, and provide services such as the Hospital, Learning Zone, Arts Centre and main Civic Centre.

7.11 The District Town Centres of Tredegar, Brynmawr and Abertillery will provide local shopping facilities and accommodate a range of services, facilities and employment.

7.12 It is proposed that Tredegar District Town Centre will maximise the opportunities to develop complementary roles around tourism. The planned investment in Bedwellty House and Parkland and development at Parc Bryn Bach provides an opportunity for Tredegar to attract visitors and for the town to benefit by catering for the needs of visitors. The historical legacy provides opportunities to build tourism opportunities around heritage trails such as the Aneurin Bevan Stones and Ironmakers trails.

7.13 The location of Brynmawr, at a gateway to the Brecon Beacons National Park, Valleys Regional Park and Blaenavon World Heritage Site provides an opportunity to service visitors either through providing a stop over facility (directing and informing travellers), or by encouraging people to stay over in Brynmawr. Brynmawr is also the starting point of the Ebbw Fact trail and has a museum that reflects the rich local heritage.

7.14 The Local Town Centre of Blaina will act as a local shopping centre to provide facilities for the local communities. Furthermore, Blaina Local Town Centre will look to build on and exploit its local heritage. The town's historical legacy provides opportunities to build tourism opportunities around heritage trails in connection with the Chartist Movement in the area. A Chartist Exhibition and Information Centre has already been established at Salem Chapel in the town centre. The area also has strong links to mining and ironworks given that, Nantyglo and Blaina was at one point the largest iron producing centre in the world.

Primary Retail Areas

7.15 Paragraph 10.2.7 of PPW outlines that development plans may distinguish between primary and secondary frontages in town centres and consider their relative importance to the character of the centre. Primary frontages are characterised by a high proportion of retail uses, while secondary frontages are areas of mixed commercial development including, for example, restaurants, banks and other financial institutions. Banks and other financial institutions provide important services and local planning authorities should encourage their retention in town centres. However, such uses should not be allowed to dominate primary shopping areas in a way that can undermine the retail function.

7.16 The Unitary Development Plan did not identify primary and secondary frontages. Through the Local Development Plan pre-deposit consultation, it was recognised that shopping not only contributes to the vitality, attractiveness and viability of town centres but also provides benefits to the local economy and can complement the leisure and tourism objectives of the Plan. It is therefore considered important to protect the retail core of the main town centres in accordance with PPW and oppose developments which harm or undermine this function.

7.17 Primary Retail Areas are characterised by a high proportion of retail A1 uses. Based on the results of the annual retail surveys and regeneration strategies and plans in place for the town centre a retail core referred to as a Primary Retail Area in the LDP has been identified for the Principal and District Town Centres. The boundaries of the Primary Retail Areas are shown in Appendix 3.

7.18 Table 12 provides information on the number of A1 (shops) uses, vacancy levels and residential properties within the current town centre boundaries. It is considered that primary retail areas should only be applicable to the higher order centres i.e. principal town centre and district centres.

7.19 Data referred to in Table 12 has been gathered from the council's own town centre survey data. Percentage data has been rounded to the nearest percent.

Table 12: Review of Current Retail Designations

Retail Centre	Current Designation in the adopted UDP	Number of A1 Uses, Vacancy Levels and Residential Properties	Proposed action to protect the retail function of the centre in the LDP
Ebbw Vale	Town Centre	**Percentage of class A1 uses (July 2009):** **= 47%** (decrease of 3%, 5 units since 2006) **Percentage of vacant units (July 2009):** **= 12%** (increase of 3%, 4 units since 2006) **Percentage of residential properties (July 2009)** **= 4%** (no change since 2006)	Introduce a Primary Retail Area based on the concentration of A1 uses in the town centre. Consider revising existing town centre boundaries to remove the areas which do not incorporate retail uses i.e. residential properties on the peripheries of the town.
Tredegar	Town Centre	**Percentage of class A1 uses (July 2009):** **= 42% (72 units)** (decrease of 4%, 4 units since 2006) **Percentage of vacant units (July 2009):** **= 14%** (increase of 3%, 5 units since 2006) **Percentage of residential properties (July 2009)** **= 5%** (decrease of 2%)	Introduce a Primary Retail Area based on the concentration of A1 uses in the town centre. Consider revising existing town centre boundaries to remove the areas which do not incorporate retail uses i.e. residential properties on the peripheries of the town.
Brynmawr	Town Centre	**Percentage of class A1 uses (July 2009):** **= 32% (50 units)** (decrease of 3%, 4 units since 2006) **Percentage of vacant units (July 2009):**	Introduce a Primary Retail Area based on the concentration of A1 uses in the town centre. Consider revising existing town centre

Retail Centre	Current Designation in the adopted UDP	Number of A1 Uses, Vacancy Levels and Residential Properties	Proposed action to protect the retail function of the centre in the LDP
		= 12% (increase of 3%, 3 units since 2006) **Percentage of residential properties (July 2009)** **= 22%** (decrease of 1%)	boundaries to remove the areas which do not incorporate retail uses i.e. residential properties on the peripheries of the town.
Abertillery	Town Centre	**Percentage of class A1 uses (July 2009):** **= 30% (48 units)** (decrease of 1%, 4 units since 2006) **Percentage of vacant units (July 2009):** **= 20%** (decrease of 1%, 2 units since 2006) **Percentage of residential properties (July 2009)** **= 15%** (increase of 3%)	Introduce a Primary Retail Area based on the concentration of A1 uses in the town centre. Consider revising existing town centre boundaries to remove the areas which do not incorporate retail uses i.e. residential properties on the peripheries of the town.
Blaina	Town Centre	**Percentage of class A1 uses (July 2009):** **= 27% (17 units)** (increase of 7%, 4 units since 2006) **Percentage of vacant units (July 2009):** **= 22%** (decrease of 10%, 7 units since 2006) **Percentage of residential properties (July 2009)** **= 22%** (no change)	Remove UDP retail designation of a town centre and reclassify as a local centre within the hierarchy. Propose a policy protecting the retail function of the centre. Consider revising existing town centre boundaries to remove the areas which do not incorporate retail uses i.e. residential properties on the peripheries of the town.

Town Centre Boundaries

7.20 The existing town centre boundaries have been reviewed and amended to reflect changes in the retail offer in these locations. Table 13 describes the proposed amendments whilst cross-referring these changes to maps in Appendix 2.

Table 13: Proposed Amendments to Town Centre Boundaries

Town Centre	Map Ref	Proposed amendment to retail boundaries	Recommendation
Ebbw Vale	**1A**	Removal of a residential property which is located on the edge of The Walk retail development.	Revise town centre boundary to exclude this property.

Town Centre	Map Ref	Proposed amendment to retail boundaries	Recommendation
	1B	Removal of properties 93, 91, 89, 87, 85, 83, 81, 79, 77, 75a, 75b, 73 and 71 Bethcar Street from the town centre boundary. These properties are predominantly residential properties and vacant properties. Also the majority of the properties in this area look like and have the layout of residential properties, which the properties previously was.	Revise town centre boundary to exclude these properties.
	1C	Inclusion of the police station in the town centre boundary as this area is included as a retail action area.	Revise town centre boundary to include this property.
	1D	Removal of properties 1-7 Libanus Road and 1-2 Station Road as these properties from the town centre Boundary. These properties are considered an edge of town centre location which comprise of residential and vacant properties.	Revise town centre boundary to exclude these properties.
	1E	In the Unitary Development there was no primary retail area.	Create a primary retail area to protect the retail core of the town.
	1F	Inclusion of the A4046 road to reflect the development opportunities identified in Ebbw Vale Sustainable Regeneration Framework.	Revise town centre boundary to include the A4046.
	1G	Revise town centre boundary to ensure the boundary follows a logical line.	Revise town centre boundary.
	1H	Inclusion of the Former County Hotel land to reflect the development opportunities identified in the Ebbw Vale Sustainable Regeneration Framework.	Revise town centre boundary to include the land.
Tredegar	2A	Removal of properties 2-10 Morgan Street; 1 Bridge Street; Central Chambers; 1-2 Market Street; and 34-36 Market Street from the town centre boundary. These properties are predominantly residential properties and vacant properties rather than town centre uses.	Revise centre boundary to exclude these properties.
	2B	Removal of part of Queen Victoria Street to ensure the boundary follows a logical line.	Revise town centre boundary to reflect this.
	2C	Removal of the car park from within the town centre boundary to ensure a consistent approach across all town centres.	Revise town centre to exclude the car park.

Town Centre	Map Ref	Proposed amendment to retail boundaries	Recommendation
	2D	In the Unitary Development there was no primary retail area.	Create a primary retail area to protect the retail core of the town.
	2E	Inclusion of a vacant parcel of land adjacent to the Gwent Shopping Centre. This land is viewed as a potential development opportunity.	Revise town centre boundary to include this land.
Brynmawr	**3A**	Removal of properties 1-3 Blaina Road; 19-20, 22, 23, and 25 Bailey Street; 91-100 Bailey Street; 2 Market Square; 111, 112, 114, 40 and the former Post Office Worcester Street; 84- 75, 220, 221, 9-11, 1-6 and 230-233 King Street from the town centre boundary. These properties are predominantly residential properties and vacant properties rather than town centre uses.	Revise centre boundary to exclude these properties.
	3B	Removal of a public house on Glamorgan Street as not considered a town centre location.	Revise town centre boundary to exclude this property.
	3C	In the Unitary Development there was no primary retail area.	Create a primary retail area to protect the retail core of the town.
	3D	Removal of the car park from within the town centre boundary to ensure a consistent approach across all town centres.	Revise town centre to exclude the car park.
Abertillery	**4A**	Removal of properties 9 - 15 Tillery Street; 2 Park Place; No 6, 23, 24a, 24, 26, 27, 39 and 40 King Street; 1 Cross Street; 15-18 Carmel Street; 2, No 21 and 23 Market Street and No 60, 62, 64, 66, 68 and 70 Somerset Street from the town centre boundary. These properties are predominantly residential and vacant properties and not town centres uses.	Revise the centre boundary to exclude these properties.
	4B	In the Unitary Development there was no primary retail area.	Create a primary retail area to protect the retail core of the town.
	4C	Inclusion of the Institute located on Division Street and the vacant parcel of land adjacent to the building. The institute is a public facility located in Abertillery town centre. The parcel of land adjacent to the site is an opportunity for a commercial development such as a library.	Revise the centre boundary to include this property and area of land.

Town Centre	Map Ref	Proposed amendment to retail boundaries	Recommendation
Blaina	**5A**	Removal of properties 86-88 High Street and The Red Lion Public House as these properties located on the edge of town. Apart from the public house the remainder of the properties are vacant or residential.	Revise the centre boundary to exclude these properties.
	5B	Removal of properties 43 and 44 Church Street from the town centre boundary. Both of these properties are residential.	Revise the centre boundary to exclude these properties
	5C	Revise town centre boundary to ensure the boundary follows a logical line.	Revise town centre boundary.

Out of Town and Edge of Centre Retail Development

7.21 The LDP does not specifically deal with proposals for retail development outside the town centres. Although PPW (February 2011) paragraph 10.2.13 states that Development Plans should include a policy for retail proposals on unallocated sites. Paragraph 10.3.1 provides 10 criteria for considering such proposals, including need, sequential approach and impact on centres. Having reviewed paragraph 10.3.1 it is considered that there is nothing locally distinctive that the LDP can usefully add to it. In practice, any future retail proposals for unallocated sites outside centres will be considered against paragraph 10.3.1, using retail and transportation impact assessments as necessary.

8.0 DEMAND AND PROVISION

8.1 PPW (paragraph 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".*

8.2 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

8.3 Because of these predictive difficulties, in implementing its retail strategy, the Council will maintain a 'monitor and manage' approach rather than the 'predict and provide' approach, which relies solely on forecasts of future demand and supply.

8.4 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 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.

8.5 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.

8.6 The information and survey results provided in the earlier sections of this background paper have shown the County Borough's shopping centres to still be deficient in terms of quality and quantity of retail provision, especially in terms of comparison goods floorspace. The next step is to seek to estimate future demand over the plan period and then seek to cater for a realistic amount of retail provision.

Future Expenditure Growth

8.7 The expected population forecast of **71,000** in 2021, represents a change in population of over 1,700 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

8.8 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 prices indices by goods type for the United Kingdom from Household final consumer 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

8.9 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, bicycles, recreational and other miscellaneous 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

8.10 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 (1994-2005) suggests that there is virtually no growth in this category. A clearer growth trend is visible looking t more recent data periods. Medium 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 1990 is excluded. Average growth calculated since the mid-1990s is 0.9%.

8.11 The Map Info Information Brief contains two types of forecasts:

- Trend projections

  Projections in the 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 if for the period 1998-2005, when the annual growth rate average 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 ad 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 goods expenditure is expected to be 0.6% in 2006, with average annual growth rates projected to increase in line with short runs trends of 0.9% over time.

8.12 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.

8.13 Information Brief 6/02 describes the Medium Term trends as being most statistically robust and more realistic for both comparison and convenience goods. Therefore for the purpose 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 a 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 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

8.14 The Shopper Attitude Survey 2008 found that there is a high level of sufficiency in the County Borough for food shopping with 78% of residents doing their main food shopping within the County Borough. Nevertheless, retail forecasts predict that if shopping patterns were to remain unchanged, our predicted **71,000** residents would be spending in the order of up to **£26.3 million** (2003 prices) on food purchases in stores outside the County Borough every year by 2021. See Table 14 below.

Table 14: Calculation of Expenditure Leakage beyond the Blaenau Gwent Area by 2021

Resident expenditure outside Blaenau Gwent from the 2006 survey		**Value, Millions**
Convenience Goods	71,000 x 22% x 1,686.64*	**£26.3 m**
Comparison Goods	71,000 x 79% x 6,535.81*	**£366.6 m**

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

8.15 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 21% of residents shop at centres within the boundary for comparison goods. Again, if shopping patterns were to remain unchanged, our residents would be spending in the order of **£366.6 million** (2003 prices) on comparison good purchases in stores outside the County Borough every year by 2021. See Table 14 above.

Table 15: Target % Resident Expenditure to be retained in Blaenau Gwent Town Centres

Resident expenditure in Blaenau Gwent	Actual from 2008 survey	Target by 2021
Convenience Goods	78%	90%
Comparison Goods	21%	40%

Source: BGCBC shopper Attitude Survey 2008

8.16 Table 15 above illustrates the shopper attitude survey results in 2008 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 have been chosen by the Council with the aim to retain more of resident's retailing expenditure within the County Borough. Thus, the Council's targets assume that an additional 12% of residents' food expenditure and an additional 19% of resident's comparison expenditure will be retained by 2021. These targets are applied in the relevant demand and provision sections below appearing in Tables 18 and 22.

The Demand / Supply Projections

8.17 This section contains the future demand and supply calculations for convenience goods and for 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.

<u>National expenditure figures</u>

8.18 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.

<u>Floorspace figures</u>

8.19 The net floorspace figures for retail units in the town centres of Abertillery, Blaina, Brynmawr, Ebbw Vale and Tredegar are from the recent retail study undertaken by CACI (2008). The net floorspace figures for retail units in out of town locations such as the large convenience stores are taken from BGCBC Retail Impact Assessments (2006), and therefore can be considered to be accurate.

8.20 In order to use net floorspace figures throughout in the retail calculations, in some instances only the gross floorspace figures for convenience and comparison sales area were available. In these instances, an 80% ratio was applied to reduce the gross floorspace to approximate to an equivalent net floorspace.

Diversion to Internet Shopping

8.21 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 be even smaller for the population as a whole. Therefore 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.

8.22 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 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 included the food category as well, it implies that the diversion of comparison goods will be even higher.

8.23 In the County Borough, it is considered that the percentage of online purchases of comparison goods will be lower than any national average 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 the internet in the County Borough area by 2021 (bulky and non bulky comparison goods) will reach 40%. Table 16 below summarises the Council's assumed percentage diversion of trade to the internet shopping mode by 2021, by each retail sector.

Table 16: Diversion of Trade to Internet Shopping

Resident expenditure in the CB	Forecast Diversion to Internet Sites by 2021
Convenience Goods	10%
Comparison Goods	40%

Source: BGCBC Forecasts

Visitor Expenditure Level

8.24 The Council's Shopper Attitude Survey gathered information on how far people have travelled to our main town centres. An assumption was made that those people who had travelled from outside the town centre had travelled 30 minutes or more. In Tredegar, however, because of the close proximity (less than minutes) to Merthyr Tydfil and Rhymney, the figure for those travelling 21-30 minutes was used. See Table 17 below for the actual figures by centre. In 2008 it is estimated that the proportion of visitors in relation to residents to the town centres was 9.2%.

Table 17: Visitors to the 5 shopping centres

Centre	Total Number of Interviews	% who travelled 30 minutes or more
Abertillery	202	2.0%
Brynmawr	201	6.0%
Ebbw Vale	207	5.8%
Ebbw Vale Festival Shopping Outlet Centre	201	29.9%
Tredegar	205	2.5%
Total	**1,016**	**46.2%**

Source: BGCBC Shopper Attitude Survey (2008) Street Interviews

8.25 The 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 to access a particular service. On the other hand some people who work in the County Borough but reside outside it may do their 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.

8.26 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 the residents do.

CONVENIENCE GOODS DEMAND AND PROVISION

Table 18: Convenience Goods Demand in 2021

A	Population of County Borough in 2021 at target figure		71,000
B	UK Exp. / £ capita in 2006 at 2005 prices, adj from 2003	2003 x 1.017 x	£1,589
C	UK Exp / £ capita in 2021 est, from 2020, at 2005 prices, adj from 2003	1.017x1562/1554	£1,715
D	Estimated % of food shopping in store 'v' 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**	**£98.6m**
G	Shoppers visiting the CB area as % target pop local spend	9.2%x90%xA	5,879
H	Est. Visitor Conv. Exp. 2021, target pop local spend x half	G x C x 50%	£5.0m
J	**Total convenience Exp. In shops, 2021, target pop**	**F + H**	**£103.6m**

A The population forecast range, LDP background paper, Population and Housing
B From Map information brief 6/02, the 2003 prices adjusted to 2005

C Based on projection of 2005 – 2020 figs, the medium trends, MapInfo Information brief 6/02, the 2003 prices adjusted to 2005
D See paragraph 8.21 and Table 16
E See Table 15
G See Table 17
H See paragraph 8.26

Table 19: Existing Convenience Goods Floorspace Turnover

J	**Total convenience Exp. In shops, 2021, target pop**	**Table 18**	**£103.6m**

K1	Total Net Floorspace of food stores outside town centre		8,446 sq m
K2	Average Est. Turnover £ / sq m at 2006		£8,447
K3	**Sub Total Estimated Turnover**	**K1x K2**	**£71.3m**
L1	Total Net Floorspace of conv. stores in the town centre		5,315 sq m
L2	Average Est. Turnover £ / sq m at 2006		£2,750
L3	**Sub Total Estimated Turnover**	**L1 x L2**	**£14.6m**
M	**Total Estimated Existing Turnover**	**K3 + L3**	**£85.9m**
N	**Unsatisfied Target Demand in 2021**	**J - M**	**£17.7m**

K1 Floorspace figures of particular stores reduced by extent of non-convenience goods area
K2, L2 Retailer turnovers are estimates based on retail impact studies, 2006 prices
L1 Floorspace figure taken from CACI Town Centre Health Checks, 2008

Allocations for Food Store Sites

Table 20: Demand / Supply for Convenience Goods

Demand Side

N	Unsatisfied Target Demand in 2021, target pop	**Table 19**	**£17.7m**

Supply Side: Commitments & Proposals

	Extension to Tesco Stores, North West Approach		
1.1	Net Convenience Floorspace Figure assuming 80%		1,363 sq m
1.2	Estimated Turnover £ / sq m at 2006 prices		£10,200
1.3	**Estimated Store Turnover**	1.1 x 1.2	**£13.9m**
P	**Total Estimated Turnover of Food Retail Sites**	1 site	**£13.9m**
R	**Remaining Unsatisfied Demand 2021**	N-P	**£3.8m**
S	**Total Supply relative to Unsatisfied Demand 2021**	P / N x 100	**78.5%**

Floorspace figures of particular stores reduced by extent of non-convenience goods areas
Retailer turnovers are estimates based on retail impact studies, 2006 prices

Table 21: Allocations for Food Store Sites

R	Remaining unsatisfied Demand 2021		£3.8m
T	Average Estimated Turnover £ / sq m at 2006		£3,500
	Allocated land to meet unsatisfied demand	**R / T**	**1,085 sq m**

8.27 It is the intention that the LDP policy should build on the food store provision which has been successfully attracted to the main town centres over the last few decades. The aim is to sustain and enhance the vitality and viability of the 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.

8.28 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.

8.29 Table 21 above identifies that **1,085 sq m** of land is required to meet the unsatisfied demand in convenience retailing. The Ebbw Vale Sustainable Development Framework identifies a redevelopment scheme which proposes a new southern gateway to Ebbw Vale town centre, incorporating an office development and potential 500 sq m food store. The proposal provides a positive solution to a number of the unoccupied and unattractive buildings in the town centre. In addition this project would significantly increase the daily footfall through the town centre. The remaining 585 sq m of additional convenience floorspace will be met through vacant properties in the town centres.

COMPARISON GOODS DEMAND AND PROVISION

Table 22: Comparison Goods Demand in 2021

A	Population of County Borough in 2021 at target figure		71,000
B	UK Exp. / £ capita in 2006 at 2005 prices, adj from 2003	2003 x 0.949	£2,768
C	UK Exp / £ capita in 2021 est, from 2020, at 2005 prices, adj from 2003		£6,202
D	Estimated % of comparison goods in store 'v' online in 2021		60%
E	Target percentage of population to shop inside CB		40%
F	**Residential convenience Exp. In shops, 2021, target pop**	**A x C x D x E**	**£106m**
G	Shoppers visiting the CB area as % target pop local spend	9.2%x40%xA	£2,613
H	Est. Visitor Conv. Exp. 2021, target pop local spend	C x G x 33%	£5.3m
J	**Total comparison Exp. In shops, 2021, target pop**	**F + H**	**£111.3m**

A The population forecast range, LDP background paper, Population and Housing
B from Map information brief 6/02, the 2003 prices adjusted to 2005
C Based on projection of 2005 – 2020 figs, the medium trends, MapInfo Information brief 6/02, the 2003 prices adjusted to 2005
D See paragraph 8.21 and Table 16
E See Table 15
G See Table 17
H See paragraph 8.26

Table 23: Existing Comparison Goods Turnover

J	**Total comparison Exp. In shops, 2021, target pop**	**Table 22**	**£111.3m**
K1	Town Centre Comparison Goods Sales Net Floorspace		16,052 sq m
K2	Estimated Turnover £ / sq m at 2006 prices		£2,500
K3	**Sub Total Estimated Turnover**	**K1 x K2**	**£40.1m**
L1	Out of Town Comparison Goods Sales Net Floorspace		12,069 sq m
L2	Estimated Turnover £ / sq m at 2006 prices		£2,500
L3	**Sub Total Estimated Turnover**	**L1 x L2**	**£30.2m**
M1	Large Conv. Store net space selling Comp. Goods		2,729 sq m
M2	Estimated Turnover £ / sq m at 2006 prices		£5,000
M3	**Sub Total Estimated Turnover**	**M1 x M2**	**£13.6m**
N	**Total Estimated Existing Turnover**	K3+L3+M3	**£83.9m**
P	**Total Unsatisfied Target Demand in 2021**	J – N	**£27.4m**

K1 Floorspace figure taken from CACI Town Centre Health Checks, 2008
L1 Floorspace figures are taken from retail impact studies, 2006
K2, L2 ,M2 Retailer turnovers are estimates based on retail impact studies, 2006 prices
M1 Floorspace figures of particular stores reduced by extent of non-convenience goods area

Table 24: Demand / Supply for Comparison Goods

Demand Side

P	**Unsatisfied Demand in 2021 at 2006 prices**	**Table 23**	**£27.4m**

Supply Side: Commitments & Proposals

	Extension to Festival Shopping Outlet Centre		
1.1	Comparison Goods Sales Net Floorspace		1,421 sq m
1.2	Estimated Turnover £ / sq m at 2006 prices		£2,300
1.3	**Estimated Turnover**	1.1 x 1.2	**£3.3m**
	Rhyd y Retail Park		
2.1	Comparison Goods Sales Net Floorspace		5,909 sq m
2.2	Estimated Turnover £ / sq m at 2006 prices		£2,500
2.3	**Estimated Turnover**	2.1 x 2.2	**£14.8m**
	Extension to Tesco Stores, North West Approach		
3.1	Net Comparison Floorspace Figure assuming 20%		340 sq m
3.2	Estimated Turnover £ / sq m at 2006 prices		£5,000
3.3	**Estimated Turnover**	3.1 x 3.2	**£1.7m**
R	**Total Est. Turnover of Comparison Goods Sites**	1.3+2.3+3.3	**£20.0m**
S	**Remaining Unsatisfied Demand 2021**	P-R	**£7.4 m**
T	**Total Supply relative to Unsatisfied Demand 2021**	R/P X 100	**73%**

Retailer turnovers are estimates based on retail impact studies, 2006 prices

Table 25: Allocations for Comparison Goods

S	Remaining unsatisfied Demand 2021		£7.4m
U	Average Estimated Turnover £ / sq m at 2006		£2,500
	Allocated land to meet unsatisfied demand	S/ U	**2,960 sq m**

8.30 The Shopper attitude surveys showed that for 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

8.31 Table 25 above identifies that **2,960 sq m** of land is required to meet the unsatisfied demand in comparison retailing. The Ebbw Vale Sustainable Development Framework identifies that Ebbw Vale Town Centre has the physical capacity for further growth in its retail and service provision. The Market Square redevelopment scheme identifies approximately 1,300 sq m of development opportunities for retail, mixed use and public realm opportunities. A 500 sq m of vacant triangular shaped land at Market Street in Ebbw Vale Town Centre has also been identified as a further retail development opportunity. It is proposed that the remaining 1,060 sq m of additional comparison floorspace will be met through vacant properties in the town centres.

9.0 RESULTS OF PREVIOUS CONSULTATION

PRE DEPOSIT PARTICIPATION

9.1 Pre-deposit participation undertaken between July and August 2007 has provided a clear indication of those land use issues that key stakeholders consider to be of primary importance in Blaenau Gwent.

The Issues Paper (July 2007)

9.2 The Issues Paper was prepared as a discussion document intended to promote debate on the issues of strategic significance for the authority. The document was placed on the Council's website and sent to Members, key officers, statutory consultees and interested parties. In total, 176 individuals were consulted and 14 responses were received.

9.3 In terms of town centres, the key issues identified for the next 15 years were:

- To arrest decline in the town centres;
- To find a role/function for town centres;
- Decrease vacancy rates in the town centres; and
- Encourage multiple retailers and a mix of uses within the town centre.

9.4 Consultees were asked a number of questions:

Future Roles and Functions of the Retail Centres
Question 4.1
What are the future roles and functions of the current retail centres in Blaenau Gwent?

4 comments were made in relation to this question:

Comment - Retail centres should be diversified to include service/social facilities such as libraries/ health centres and leisure activity venues.

Response
Agreed. The Deposit Plan policies encourage a diversity of uses in the town centres.

Comment- A regional centre should be identified and promoted.

Response
The Deposit Plan has regard for the Wales Spatial Plan and identifies and promotes Ebbw Vale as a sub regional centre.
Comment - the retail centres should 'specialise' due to the difficulty of sustaining a viable retail sector in all large towns.

Response
Agreed. The Deposit Plan seeks to identify a retail hierarchy and seeks to be clear about their roles.

Comment - the function and role of Blaina town centre should be retained and strengthened.

Response
Agreed. The Deposit Plan seeks to retain and strengthen Blaina town centre through reclassifying the centre as a local centre and to build tourism opportunities around heritage trails in connection with the Chartist Movement in the area and the recently established Chartist Exhibition and Information Centre.

Question 4.2
Should we look to identify which towns have the most potential for retail?

57% of respondents considered that we should look to identify those towns with the most retail potential, with 43% of respondents disagreeing. 3 comments were made in relation to this question.

Comment
One comment suggested that the retail role of the town centres identified should be consolidated as they currently serve the population and should be retained and strengthened rather than dispersing development to other settlements.

Response
In accordance with national planning policy the Deposit Plan proposes a retail hierarchy. The town centres will be retained to serve the local population and will be strengthened through the identification of new roles and functions.

Comment - Wales Spatial Plan promotes an Ebbw Vale focus

Response
Agreed. The Wales Spatial Plan identifies Ebbw Vale as a key settlement that has a critical role to play in the success of the Capital Region. Consequently, Ebbw Vale will perform a sub-regional retail role.

Comment
One comment received referred to the recognition that to maintain five equally vibrant towns within the Borough is not a realistic proposition but conversely, to concentrate on the three largest towns only, would be to neglect a duty of care to the smaller towns.

Response
Agreed. In order to meet future retail needs in a co-ordinated and sustainable manner, a retail hierarchy has been established. At the top of the hierarchy is the Principal Town Centre of Ebbw Vale (sub-regional role), followed by Abertillery, Tredegar and Brynmawr (District Town Centres) followed by Blaina (Local Town Centre) and Neighbourhood Centres. Each town centre will have their own retail role and look to explore specialist roles around tourism, leisure and heritage.

Retail Hierarchy and Retail Boundaries

Should we look to reassess the retail hierarchy and retail boundaries of the town centres?
57% of respondents agreed with the above question, whilst 43% disagreed. One specified that boundary changes might lead to more town centre shops and other facilities being readily accessible to users that walk or cycle.

Response
Chapter 7 of this Background Paper seeks to reassess the retail boundaries of the town centres in order to reflect changes in the retail offer in these locations. This Chapter also explains the rationale behind establishing a retail hierarchy of the town centres.

Vibrant and Vital Town Centres

Question 4.3
How can we promote vibrant and vital town centres?
According to 43% of respondents environmental improvement and enhancement is a way in which to promote town centres. Other suggestions received were to develop an attraction to entice people into the town centre, (such as a market, museum, a cinema or street furniture), to increase the population living in and close to the town centres, and to create a clean, safe and pleasant environment.

Response
These views have been taken into consideration in Strategic Policy 3, which seeks to enhance the quality of the retail offer, through attracting good independent retailers and enhancing the quality of the retail accommodation and retail environment.

Question 4.4
Should the plan encourage a mix of uses in the town centres?
83% agreed that a mix of uses should be encouraged whilst 17% disagreed. There was a general recognition that providing a mix of uses is an important policy tool in promoting vibrancy and vitality in town centres.

Response
These views have been taken into consideration as the Deposit Plan policies encourage a diversity of uses in town centres

Additional Retail Space

Question 4.5
Does the plan need to identify additional retail space?
All respondents agreed that there was no justification in terms of demand to allocate more retail space as the current town centres are struggling. A comment was received that existing opportunities, such as vacant units should be exploited before further development is allowed.

Response
Chapter 8 of this Background Paper, in accordance with national planning policy considers whether there is a need for additional provision for these uses.

Local Shopping Facilities

Question 4.6
Should the Plan aim to protect local shopping facilities?
All respondents agreed that the essential day-to-day functions within all towns should be protected to help reduce the need to travel to other centres outside the local neighbourhood.

Response
Agreed. The Deposit Plan seeks to protect local shopping facilities to acknowledge that local shops play a vital role in sustaining smaller neighbourhood centres and reducing the need for residents to travel to meet everyday needs.

Sustainability Appraisal / Strategic Environmental Assessment Scoping Exercise

9.5 The Sustainability Appraisal (SA) / Strategic Environmental Assessment (SEA) Scoping Exercise was undertaken between March – December 2007. The process identified key strategic problems, objectives and issues for sustainability. 18 key sustainability issues were identified, 1 of which is related to retailing:

- High vacancy rates in town centres

ISSUES AND VISION WORKSHOP

9.6 At the Issues and Vision Workshop held in July 2007 attendees were provided with the list of issues identified from the Issues Paper and asked to agree and then prioritise the issues.

9.7 The group added a further 5 issues to the identified issues to produce the following:

- To arrest decline in the town centres
- To find a role/ function for the town centres
- Decrease vacancy rates in the town centres
- Encourage multiple retailers and a mix of uses within the town centre – specialist shops, coffee shops and offices – creating a niche market
- Out of town shopping and the effect on the vitality and viability of the town centres
- High rates in town centres
- Effect of retail in employment areas on town centres
- Number of takeaways in town centres
- Access and parking

9.8 The group were then asked to prioritise the two most significant issues, the two issues with the highest number of votes were:

- To find a role/ function for town centres
- Encourage multiple retailers and a mix of uses within the town centres – specialist shops, coffee shops and offices – creating a niche market.

9.9 The third task was to identify the most significant issues for Blaenau Gwent across all the topic areas. From this it can be deduced that that the two most significant issues were:

- The implications of the decline in manufacturing sector and the shift in favour of the service sector and technological industries; and
- To find a role/function for town centres.

9.10 A detailed account of this process is set out in the Issues Paper – Report of Consultation (September 2007) and the Issues and Vision Report of Consultation (August 2007), which is available on the Council's website.

PREPARATION OF OPTIONS FOR WORKSHOP

9.11 As the role / function of town centres were identified as a key issue for the area, town centres formed a major part of the options scenarios. The Council devised and tested three options.

Option 1: Regeneration (continuation of UDP strategy)
This option maintains the current strategy contained within the Blaenau Gwent Adopted Unitary Development Plan (1996-2011). The strategy in the UDP was to create a framework of towns and local centres to protect and enhance the retail centres and to safeguard employment and the interests of less mobile shoppers. A continuing widening of the range of activities other than shop and services was encouraged to strengthen the attraction and use of town centres. Five town centres were identified at Abertillery, Blaina, Brynmawr, Ebbw Vale and Tredegar. Local centres were not identified.

Option 2: Growth and Regeneration.
This is a growth strategy, which identifies a retail hierarchy with Ebbw Vale as a sub-regional centre (main hub) and Abertillery, Brynmawr and Tredegar as district centres (district hubs). Ebbw Vale will be the main retail centre as well as the focus for the main services for the Borough such as the Hospital, Leaning Campus, Theatre and main Civic Centre. Abertillery, Brynmawr and Tredegar will be district centres (district hubs) providing for the retail needs of their districts. They will also look to new roles based around tourism and leisure and the provision of local services.

Option 3: Balanced and Interconnected Communities
This is a trend-based option which proposes that the town centres of Abertillery, Brynmawr, Ebbw Vale and Tredegar will be the main retail centres and service centres for the County Borough. They will develop complementary roles around Tourism and Leisure.

VISION AND OPTION WORKSHOP
The Preferred Option

9.12 Each of the scenarios were put forward for consideration as part of the Vision and Options workshops (Report on the development of the Options, March 2009).
It was clear following the workshops that option 2 was the preferred option. However, this option was modified in response to attendees who considered that the option 3 approach to having complementary roles for the town centres was more favourable. These changes were incorporated into option 2.

9.13 The LDP Forum and Steering Group supported option 2. However, the Steering Group made a further change to the Town Centres by including Blaina as a district/local shopping centre.

THE DRAFT PREFERRED STRATEGY (NOVEMBER 2008)

9.14 The Draft Preferred Strategy was subject to public consultation for a period of six weeks from 7th November until 19th December 2008, during which time a total of 18 exhibitions were also held covering every ward across the County Borough. In total, 58 respondents made 414 representations on the Preferred Strategy, 278 of which were comments/objections and 136 expressions of support.

9.15 The Preferred Strategy provided the following policy framework for retailing in Blaenau Gwent.

Objectives

9.16 The Draft Preferred Strategy set out two objectives for town centres based on the two priority issues identified at the Issues and Vision Workshop.

Objective 1
Develop Ebbw Vale as the main service and retail hub for the County Borough.

Objective 2
Create a network of vibrant district/local centres (secondary hubs), well linked to the main hub of Ebbw Vale, that provide a range of local services and facilities for their local communities.

9.17 The following comments were received on these objectives:

Issue – Objectives need to be 'smart'

Response
All the objectives have been rewritten in an attempt to make them smarter

Issue – explicit reference to sustainable transport should be made in objective 2

Response
It is agreed that objective 2 would benefit from the inclusion of a reference to sustainable transport.

The retailing objective now reads:

By 2021, Ebbw Vale will be the main service and retail hub for the County Borough supported by a network of vibrant district/local centres hubs that provide a range of local services and facilities for their local communities. The district hubs will be well linked to the principal hub of Ebbw Vale through sustainable modes of transport.

TOWN CENTRE APPROACH

9.18 Respondents were generally in agreement with the proposed approach to town centres. 41 respondents considered the proposed approach, where 76% agreed, 12% disagreed, and 12% was unsure.

9.19 Eight comments were made in support and 12 objections were received to the town centre approach.

9.20 The comments of support generally supported the proposed approach to the town centres with 1 comment welcoming the inclusion of Blaina as a local/district shopping centre.

9.21 In terms of objections there were a number of areas of concern:

Issue – Overdevelopment of Ebbw Vale?
Several responses reflected that Abertillery Town Centre needs to have a viable future and the danger in the strategy is that the (over?) development in Ebbw Vale will be detrimental to it and the other towns, unless a new future niche market in addition to serving local needs is proposed and found for those. This should be part of a masterplan for Abertillery and the Ebbw Fach Valley.

Response
The Local Development Plan strategy now places less emphasis on the north-south divide and is based on regenerating the area through the hub and spoke approach i.e. building a network of district hubs around the principal hub of Ebbw Vale. It is recognised that there is a north south divide in terms of opportunities for growth but the creation of an integrated network of modern and revitalised hubs provides a mechanism to co-ordinate investment and ensures the benefits of growth and regeneration are shared widely to transform the whole of Blaenau Gwent.

Notwithstanding this there remains an emphasis in terms of development in the northern area and Ebbw Vale. This reflects the Wales Spatial Plan's identification of Ebbw Vale as a key settlement that has a critical role to play in the success of the Capital Region. Strategic Policy 2 has been developed to provide a clear vision for Ebbw Fach Valley. There are Town Centre Action Plans in place for the Principal and District Town Centres, which identify regeneration schemes. A Regeneration Action Plan covers Blaina Local Town Centre. There are also Holistic Area Regeneration Plans (HARPs) for each of the hub areas (Ebbw Vale, Tredegar, Upper Ebbw Fach and Lower Ebbw Fach).

A key challenge for the Local Development Plan was that the town centres compete against each other and have no clear roles. Strategic Policies 1 and 2 of the Deposit Plan identify new roles for the town centres: -

- Tredegar District Town Centre will expand its tourism offer through maximising the benefits of local heritage;
- Brynmawr District Town Centre will explore opportunities to develop complementary roles around tourism;
- Blaina Local Town Centre will build on and exploit its local heritage; and
- Abertillery will develop complementary roles around culture, leisure and tourism.

Issue –'The Works' and Festival Park
Another respondent argued that it is not only the town centre of Ebbw Vale that will provide the regional hub function, of equal importance are 'The Works' and Festival Park.

Response
Strategic Policy 1 of the Deposit Plan recognises 'The Works' and 'Ebbw Vale Northern Corridor' as strategic regeneration flagship schemes and are major regeneration opportunities for Blaenau Gwent.

Festival Park is recognised for its tourism potential in the Plan as a major tourist destination.

Issue – Strengthening of the Town Centres
The strengthening of the town centres was a common theme in responses to the consultation. It was widely felt that the public realm of town centres should be improved to encourage more shops into the area. However, there were conflicting views as to what shops should be attracted into the town centres. One respondent suggested that there was too much emphasis on the hierarchy of the towns and considered that all shopping areas need a basic range of shopping facilities, smaller shops rather than big supermarkets. Whilst two respondents considered that larger stores need to be attracted to the town centres otherwise it will be at risk of the loss of smaller shops or the further development of out of town developments.

Response
The Deposit Plan emphasises that town centres form an important part of Blaenau Gwent's retail hierarchy and of its social, economic and physical fabric. The town centres should offer a good choice of both comparison and convenience shopping. In addition to providing local shopping facilities they can also accommodate a range of services, facilities and employment, therefore attracting further footfall into the towns. In terms of improving the public realm of the town centres, there are Town Centre Actions Plans in place for the Principal and District Town Centre which identify regeneration schemes for the towns.

Issue – Proposed town centre approach too vague

Response
The Deposit Plan and this Background Paper explains the town centre approach in further detail.

Issue – Blaina Town Centre
One commentator took the view that Blaina will not gain at all and expressed that only the residents of the town use it and cannot think of any way to improve it.

Response
Taking this view into account and the town's key characteristics it was considered that a different approach to Blaina Town Centre was needed. Blaina is a smaller centre than the other 4 towns and offers limited choice in terms of retailing. Therefore it was considered appropriate to designate it as a Local Town Centre, principally serving the residents of Nantyglo and Blaina. The emphasis will be on convenience food shopping with an element of day-to-day comparison-shopping. A new role has also been identified for Blaina Local Town Centre which will look to build on and exploit its local heritage. The town's historical legacy provides

opportunities to build tourism opportunities around heritage trails in connection with the Chartist Movement in the area.

Strategic Policy on Retail Hierarchy

SP5 – Retail Hierarchy
Major retail, administrative and cultural developments will take place in the principal retail centre of Ebbw Vale. The District/Local centres of Tredegar, Brynmawr, Blaina and Abertillery will be protected and enhanced to improve vitality and viability and ensure they meet the needs of their districts. They will also develop new complementary roles based around historical, recreational and tourism potential. Local shopping centres will be protected and enhanced to provide facilities for local communities.

9.22 Five comments were made in support and four objections were received to this policy.

9.23 The comments of support generally welcomed the retail hierarchy with 2 supporting the inclusion of Blaina as a district/local centre.

9.24 In terms of objections there were a number of areas of concern:

Issue - Lack of evidence base
One comment reflected that the lack of evidence base available means that it is difficult to assess how robust the strategy is and clarity about the retail hierarchy and town centre regeneration schemes is required.

Response
This Paper provides the background to the town centre strategy and provides clarity on the retail hierarchy.

Issue – Proposed Retail Floorspace in the Deposit Plan
One comment reflected that given new developments are proposed some indication of the amount of floorspace envisaged for the plan period is required for both comparison and convenience goods.

Response
The amount of retail floorspace required for comparison and convenience retailing is set out in the Deposit Plan. The calculations made for this provision is set out in the Demand and Provision chapter of this background paper.

Issue – Inclusion of Festival Park and Gardens in Retail Hierarchy
One comment requested that Festival Park and Gardens should be included in the retail hierarchy as a strategic location at which opportunities for leisure, cultural and tourist facilities based on consolidation of its existing retail strength should be explored.
Response
Paragraph 10.2.13 of PPW requires that development plans should establish the strategic role to be preformed by the main centres in the retail hierarchy. The

strategic policy is in compliance with national guidance and identifies the strategic role of the 5 main town centres. Although Festival Park and Gardens are considered an important attraction in Blaenau Gwent, the nature of the shopping experience with outlet centres is different. In addition, the policy does not protect any other out of town centre locations. Therefore it is considered that Festival Park and Gardens should not be added to the retail hierarchy.

However, Festival Park is recognised for its tourism potential in the Plan as a major tourist destination.

Issue – Summary of Town Centre Action Plans should be provided

Response
The Retailing Background Paper will provide a summary of the town centre action plans under the local policy context chapter.

Issue – wording amendment
One comment suggested a minor wording amendment, to replace the word ‘protected’ with the word ‘promoted’.

Response
This has been considered when looking at the wording of the Policy.

10.0 DRAFT LDP POLICY

10.1 To address the issues raised the following is proposed:

Objective 1
By 2021, Ebbw Vale will be the main service and retail hub for the County Borough supported by a network of vibrant district/local hubs that provide a range of local services and facilities for their local communities. The district hubs will be well linked to the principal hub of Ebbw Vale through sustainable modes of transport.

Strategic Policies

SP1 Northern Strategy Area – Sustainable Growth and Regeneration

Proposals in the Northern Strategy Area will be required to deliver sustainable growth and regeneration that benefits the whole of Blaenau Gwent. This will be achieved by: -

a. Supporting the creation of a network of sustainable hubs around the principal hub of Ebbw Vale.

b. Promoting Ebbw Vale as the principal hub for Blaenau Gwent, where the majority of social and economic growth will be accommodated. The Town Centre will be the main centre for service provision where major retail expansion, administrative and cultural developments will take place.

c. Delivering strategic sustainable regeneration flagship schemes at 'The Works' and 'Ebbw Vale Northern Corridor'.

d. Supporting new roles for district and local town centres: -
- **Tredegar District Town Centre will expand its tourism offer through maximising the benefits of local heritage;**
- **Brynmawr District Town Centre will explore opportunities to develop complementary roles around tourism; and**
- **Blaina Local Town Centre will build on and exploit its local heritage.**

e. Enabling diversification of the economic base through mixed-use development in the district hubs of Tredegar and Brynmawr where it supports and reinforces the roles of the town centres.

f. Supporting a major destination attraction that would draw large numbers of people to the area and provide a significant number of jobs.

The Northern Strategy Area has experienced high levels of public investment in its infrastructure and this has been accompanied by private sector investment. The development strategy of the Plan seeks to build on major regeneration opportunities in this area to ensure that Blaenau Gwent as a whole benefits.
The Wales Spatial Plan identifies Ebbw Vale as a key settlement that has a critical role to play in the success of the Capital Region. The Strategy recognises the importance of Ebbw Vale and identifies it as the principal hub at the centre of the network of linked hubs across the County Borough. The recent opening of the rail connection to Cardiff, ongoing construction of the Heads of the Valleys Road and the availability of two strategic sites provides major opportunities for Ebbw Vale.

The Principal Town Centre of Ebbw Vale is expected to perform a sub regional retail role (Policy SP3) similar to Merthyr Tydfil and Aberdare. Ebbw Vale will be the main retail centre where the emphasis will be on a good balance between comparison (non-food) and convenience (food) shopping. Land is allocated for new comparison and convenience retailing within the town centre of Ebbw Vale, under policy R1. Ebbw Vale will be the focus for service provision in Blaenau Gwent, and provide services such as the Hospital, Learning Zone, Arts Centre and main Civic Centre. The cultural role of Ebbw Vale will be developed through plans to extend and refurbish the historic General Offices at the former Ebbw Vale Steelworks into a family history and genealogy visitor attraction, which will also include the relocation of the Gwent Records Office. There are also plans for the Ebbw Vale Institute to be used for cultural activities, learning and social enterprise.

The Strategy also recognises the potential of two key brownfield sites located in the principal hub of Ebbw Vale which are capable of accommodating significant new development to help regenerate the area. The former Corus Site, now known as 'The Works', already has outline planning permission for housing, a hospital, Learning Zone, Leisure Centre, Arts Centre, Environmental Resource Centre, Employment, new rail station and open space including a Wetland Park. The reclamation work of this 80 ha site is well underway.

The Ebbw Vale Northern Corridor site is allocated for mixed-use including housing, employment and leisure. One of the strengths of the site is its position relative to the Heads of the Valleys Road and its role as a Northern gateway into the centre of Ebbw Vale. Over 70 hectares of land is or will become available over the Plan period part of which is a strategic employment site located in a prime position along the Heads of the Valleys Road.

Both sites will be flagship schemes and incorporate high standards of design.

The role of Town Centres have been identified as a key issue by stakeholders and residents. The Plan seeks to identify new roles for the District and Local Town Centres in order for them to benefit from planned tourism and recreation growth. Tredegar District Town Centre will maximise the opportunities to develop complementary roles around tourism. The planned investment in Bedwellty House and Park and development at Parc Bryn Bach provides an opportunity for Tredegar to attract visitors and for the town to benefit by catering for the needs of the visitors. The historical legacy provides opportunities to build tourism opportunities around heritage trails such as the Aneurin Bevan Trail and Ironmakers trails.

The location of Brynmawr, at a gateway to the Brecon Beacons National Park, Valleys Regional Park and Blaenavon World Heritage Site provides an opportunity to service visitors either through providing a stop over facility (directing and informing travellers), or by encouraging people to stay over in Brynmawr. Brynmawr is also the starting point of the Ebbw Fach Trail and has a museum that reflects the rich local heritage.

Blaina Local Town Centre will look to build on and exploit its local heritage. The town's historical legacy provides opportunities to build tourism opportunities around heritage trails in connection with the Chartist Movement in the area. A Chartist Exhibition and Information Centre has already been established at Salem Chapel in the town centre. The area also has strong links to mining and ironworks given that, Nantyglo and Blaina was at one point the largest iron-producing centre in the world.

Tourism, leisure and cultural events in the town centres will play a key role in raising the profile of Blaenau Gwent and attracting visitors to the area.

In the hubs of Tredegar and Brynmawr mixed-use schemes which meet the needs of their respective districts and support the roles of the towns will be encouraged. Particular support will be given where schemes enhance town centre based employment in the retail, service, leisure or tourism sectors.

If tourism is to play a greater role in the economy and regeneration of the area Blaenau Gwent needs a major destination attraction. Being well located in terms of access to the heads of the Valleys Road and Brecon beacons National Park there is great potential for an attraction that could draw large numbers of people to the area and provide a significant number of jobs.

Any proposals will be expected to create a strong image of Blaenau Gwent and increase its profile in the national and international arena. It must also be acceptable in terms of its impact on the natural and built environment and surrounding land uses.

SP2 Southern Strategy Area – Regeneration

Proposals in the Southern Strategy Area will be required regenerate the area by: -

a. Ensuring that the district hub of Abertillery is well connected to Ebbw Vale and the wider region through safe, frequent and reliable public transport links;

b. Supporting Abertillery District Town Centre in developing complementary roles around culture, leisure and tourism;

c. Delivering 'Activity Tourism' opportunities in the area;

d. Ensuring the removal of dereliction by promoting the reuse of under used and derelict land and buildings;

e. Delivering regeneration schemes which provide residential development and infrastructure; and

f. Building on the unique identity of the area by protecting the built heritage and the natural environment.

The main difference between the south and the north is that the south has fewer opportunities for development, is not so well connected and has topographical constraints. The area does, however, have a strong sense of community pride and spectacular landscape. The Strategy needs to build on these strengths to secure regeneration and create sustainable communities.

It is important that this area is well connected with Ebbw Vale and the wider region. There are a number of proposals contained in the Plan for rail, walking, cycling and improvements to the A467 road, which will help address the accessibility issue. There are also plans to improve the bus service along the A467 corridor. With the exception of the cycle and bus improvements all the improvements are expected towards the end of the Plan period (See Delivery and Implementation table in Chapter 9 for further details).

Abertillery District Town Centre will explore opportunities to develop complementary roles around leisure and tourism. One of the strengths of Abertillery District Town Centre is the position of the centre relative to woodland and upland landscapes. There are opportunities to develop new infrastructure to enable people to use these environments and to explore the scope for mountain biking as a way of 'opening up' the natural setting of the town. The recent refurbishment of the Metropole and investment in the town centre will enhance the cultural role of Abertillery, in terms of the arts and entertainment. The cultural role has already been enhanced in the southern strategy area through the restoration of Llanhilleth Institute, which was part of an overall regeneration package.

Local opportunities for employment are necessary to ensure these communities are sustainable. The surrounding countryside offers opportunities in terms of activity tourism, which is a sector of the tourism industry that aims to attract visitors by developing activity product such as cycling, walking, riding, watersports, adventure and fishing. Sites allocated for activity tourism are identified in Policy TM1.

Investment in the area will be targeted at removing derelict under used buildings and re-using them for residential, community or commercial development.

It is vital that all new development protects the environment and cultural identity of this area, as it is the key to the areas success.

SP3 The Retail Hierarchy and Vitality and Viability of the Town Centres

1. **In order to deliver thriving town centres and protect local shopping facilities a retail hierarchy is defined as follows:**

   Principal Town Centre
   a. **Ebbw Vale will perform a sub regional retail role.**

   District Town Centres
   b. **Abertillery, Tredegar and Brynmawr will act as district shopping centres principally to serve the needs of the district. Brynmawr District Town Centre will be linked to the new retail provision at Lakeside Retail Park.**

   Local Town Centre
   c. **Blaina will act as a local shopping centre that will be protected and enhanced to provide facilities for the local communities.**

   Neighbourhood Centres
   d. **Local shops in neighbourhood centres will be protected to meet every day local shopping needs.**

2. **In order to improve the vitality and viability of the town centres:**
   a. **Shops, offices and other commercial premises, where appropriate, will be upgraded by means of refurbishment and redevelopment;**
   b. **Opportunities to improve the retail offer will be explored;**
   c. **The provision of better vehicular access and circulation arrangements, improved public transport facilities and provision of additional car parking spaces will be provided where necessary; and**
   d. **Disabled access and facilities will be improved.**

In order to meet future retail needs in a co-ordinated and sustainable manner, a retail hierarchy has been established. At the top of the hierarchy is the Principal Town Centre of Ebbw Vale (sub-regional role), followed by Abertillery, Tredegar and Brynmawr (District Town Centres) followed by Blaina (Local Town Centre) and Neighbourhood Centres.
The Wales Spatial Plan identifies Ebbw Vale as a key settlement that has a critical role to play in the success of the Capital Region. Consequently, Ebbw Vale will perform a sub-regional retail role. The LDP seeks to maintain a strong, attractive and dynamic town centre that is highly accessible and has a good degree of choice in both comparison (non-food) and convenience (food) shopping and quality services and facilities. The Plan acknowledges that the town centre has the physical capacity for further growth in its retail and service provision.

District and Local Town Centres form an important part of Blaenau Gwent's retail hierarchy and of its social, economic and physical fabric. In addition to providing local shopping facilities they also accommodate a range of services, facilities and employment.

District Town Centres are generally larger and generally contain a greater variety of retail and non-retail uses, including banks, building societies, leisure facilities and business offices. Consequently, they are generally more commercial in nature and draw comparatively larger number of shoppers. A Local Town Centre is generally smaller in size and variety of uses and more likely to retain a residential character. The size and character of District Town Centres means that they are more likely to be able to satisfactorily accommodate a greater range and mix of non-retail uses including business offices and commercial leisure facilities.

Local shops play a vital role in sustaining smaller neighbourhood centres and reducing the need for residents to travel to meet everyday needs. Neighbourhood centres may typically include a small convenience shop, newsagents and sub post office.

The Heads of the Valleys Retail Project (CACI January 2008) identified that there are opportunities, in each of the 5 retail areas, to enhance the quality of the retail offer, through attracting good independent retailers and enhancing the quality of the retail accommodation and retail environment.

The low car ownership rates in Blaenau Gwent, together with high levels of deprivation mean that the Council needs to ensure that all members of the community can access the retail areas. This relates to access by bus, car, walking and cycling together with internal circulation and parking provision.

There are Town Centre Action Plans in place for the Principal and District Town Centres, which identify regeneration schemes. A Regeneration Action Plan covers Blaina Local Town Centre.

For each town centre in the retail hierarchy, a town centre boundary has been defined. The town centre boundaries are shown on the Proposals Map and on plans in Appendix 5.

Development Management Policies

DM6 Use Class Restrictions in Principal and District Town Centres

Development proposals incorporating a change of use of ground floor premises in Principal and District Town Centres will be subject to the following restrictions:

a. Only A1 uses will be permitted within the Primary Retail Area.

b. Within the town centres, in order to minimise the impact on vitality and viability no more than 3 Hot Food Takeaways and/ or Public Houses should be located in close proximity. The number of Hot Food Takeaways, at street level, should be equal to or no greater than 7.0% and the number of public houses should be equal to or no greater than 4.0% of the total number of units in the town centre.

c. Within the town centres, the change of use of the ground floor units to

residential use will not be permitted.

This Policy applies to the Principal Town Centre of Ebbw Vale and the District Town Centres of Brynmawr, Tredegar and Abertillery.

Shopping not only contributes to the vitality, attractiveness and viability of town centres, but provides benefits to the local economy and can complement the leisure and tourism objectives of this Plan. It is therefore vital to protect the retail core of the main town centres and oppose developments which harm or undermine this function.

A retail core referred to as a Primary Retail Area in the LDP has been identified for Principal and District Town Centres. The boundaries of the Primary Retail Areas are shown on the Proposals Map and are also shown on plans in Appendix 5.

This Policy restricts Primary Retail Areas to A1 uses. The clustering of A1 uses is considered beneficial for the vitality, viability and attractiveness of the town centres. The mixture of uses within the Town Centres indicate that a high percentage of units within the identified Primary Retail Areas are currently class A1 use (relates to only the ground level of premises). Further information is available in the Retailing Background Paper.

Outside the Primary Retail Area, a diversity of uses are encouraged. Mixed use developments combining retailing with entertainment and leisure uses should be encouraged to promote lively centres as well as reducing the need to travel to visit a range of facilities. Leisure uses can benefit the town centres, and with adequate attention to safeguarding amenities can contribute to a successful evening time economy.

However, the number and concentration of hot food takeaways and public houses should not dominate the town centre and therefore detract from the overall character and function of the centres.

The significant increase in the number of hot food takeaways and public houses within the town centres has led to concern being expressed by local residents, local business and others in the area on the vitality of the shopping areas and residential amenity. This Policy aims to protect the character and function of the town centres through firstly controlling the percentage of hot food takeaways at ground floor level and public houses, and secondly the number of hot food takeaways and public houses located in close proximity within the town centres. The Retailing Background Paper sets out the reasoned justification to these approaches. Detailed guidance on Hot Food Takeaways and Public Houses in Town Centres is contained in the Supplementary Planning Guidance.

Within the town centre boundaries, the change of use of ground floor units to residential will not be permitted although the conversion of first and second floors of premises within the town centres will be permitted. The conversion of vacant and redundant first and second floorspace in retail areas can provide a useful addition to the residential stock and bring new life to town centres.

DM7 Use Class Restrictions in Blaina Local Town Centre

Development proposals incorporating a change of use of ground floor premises in Blaina Local Town Centre will be subject to the following restrictions:

a. **In order to minimise the impact on vitality and viability no more than 3 Hot Food Takeaways and/ or Public Houses should be located in close proximity. The number of Hot Food Takeaways, at street level is equal to or no greater than 7.0% and the number of Public Houses is equal to or no greater than 4.0% of the total number of units.**

b. **In the case of a change of use to residential, the unit must have been vacant for a minimum of 12 months and/or genuine efforts have been made to market the premises.**

Local Town Centres play a vital role, not only as places to shop, but because they provide the opportunity for a wide range of services to be delivered locally in locations that are accessible by a choice of transport in the centre of communities.

Blaina is expected to act as a Local Shopping Centre, principally serving the residents of Nantyglo and Blaina. The emphasis will be on convenience (food) shopping with an element of day-to-day comparison (non-food) shopping. A range of facilities and uses will be encouraged consistent with the scale and function of the Centre, to meet people’s day-to-day needs.

The significant increase in the number of hot food takeaways and public houses within Blaina Local Town Centre has led to concern being expressed by local residents, local businesses and others in the area on the vitality of the shopping areas and residential amenity. This Policy aims to protect the character and function of the town centres through firstly controlling the percentage of hot food takeaways at ground floor level and public houses, and secondly the number of hot food takeaways and public houses located in close proximity within the town centres. The Retailing Background Paper sets out the reasoned justification to these approaches. Detailed guidance on Hot Food Takeaway and Public Houses in Town Centres is contained in the Supplementary Planning Guidance.

It is acknowledged that over the life of the Plan, that some retail units within the retail centres will become redundant. Vacant units can have a significant impact on the appearance and amenity of an area and can harm wider regeneration objectives. This Policy will ensure that there is flexibility to consider the appropriate reuse of these units to residential.

Planning applications for the change of use to residential would need to be supported by evidence of a 12 month history of vacancy and/or a lack of response to genuine efforts to market the premises over a significant period.

Allocations

AA1 Action Area

Action Areas are identified at the following locations:

1. **Southern Gateway, Ebbw Vale**
2. **Market Square, Ebbw Vale**

The Ebbw Vale Sustainable Development Framework has identified the following key factors for Ebbw Vale Principal Town Centre:

- The need to develop the links from The Works regeneration area;
- Identified market demand for a Town Centre food retail outlet as an anchor store;
- The opportunity for improved public transport infrastructure and reduced through traffic as a result of the proposed Peripheral Distributor Road within the Works; and
- The opportunities to capitalise on town centre regeneration opportunities as a consequence of the relocation and redevelopment of some of the public sector buildings in the Northern Corridor.

The Ebbw Vale Sustainable Development Framework has assessed the development potential of the town centre and has identified the following action areas:

- **Southern Gateway:** A new southern gateway to Ebbw Vale Principal Town Centre is proposed incorporating a commercial hub, direct, safe and convenient pedestrian connection between the town centre and ‘The Works’ (Policy MU2). The Town Centre would benefit from more visitors as a result of a proposed office development and a new food store. The development offers the opportunity to make a significant landmark statement at a key point where the funicular will bring people up from ‘The Works’ site. In order to create this optimum link the A4046 needs to have a traffic calmed carriageway. There is also an opportunity to explore the development of land on the opposite side of the A4046 on the site of the current petrol filling station. This could provide a private sector developer with the chance to enhance the mix and quality of retail and commercial floor space in the town.
- **Market Square:** Redevelopment of Market Square, Ebbw Vale is to provide a key link with Ebbw Vale Northern Corridor site. The proposal involves the redesign of the junction arrangement with improved pedestrian movements. The proposal also involves development opportunities for mixed-use development.

R1 Retail Allocations

Land is allocated for retail development at the following locations:

Policy	Site Name	Hub	Indicative	Proposal Type

Number			Net Sales Area (sq m)	
Commitments (planning permission at April 2009)				
R1.1	Rhyd y Blew Retail Park	Ebbw Vale	6,000	Non-food retail
R1.2	Extension to Festival Shopping Outlet Centre	Ebbw Vale	1,400	Comparison
R1.3	Extension to Tesco Stores, North West Approach	Ebbw Vale	1,700	Convenience and Comparison
Proposals				
AA1.1	*Southern Gateway*	*Ebbw Vale*	*500*	*Convenience*
AA1.2	*Market Square*	*Ebbw Vale*	*1,300*	*Comparison*
R1.4	Market Street	Ebbw Vale	600	Comparison

As an integral part of the Heads of Valleys Programme, CACI were commissioned to undertake a Town Centre Health Check and Shopper Attitude Survey on each of the 11 town centres within the Heads of Valleys Area. The health check and survey work covered all 5 town centres in Blaenau Gwent.

Using this data and other retail impact assessments, produced for recent retail proposals, within Blaenau Gwent it is estimated that an additional 1,085 sq m (net) of convenience retail floorspace and 2,960 sq m (net) of comparison floorspace is required by 2021. The assessment takes into account the supply side that is retail developments/proposals that have existing planning permission at April 2009. Statistical analysis and the background to the retail floorspace requirements is contained in the Retailing Background Paper.

Convenience Retailing

Whilst there is a relatively good level of convenience goods expenditure within Blaenau Gwent, 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, but also to sustain and enhance the vitality and viability of the district and local town centres.

To address the unsatisfied demand in convenience retailing 500 sq m (indicative net sales area) of land is allocated at the southern gateway in the principal town centre of Ebbw Vale for a food store. It is proposed that the remaining 585 sq m of additional convenience floorspace will be met through redevelopment schemes in the town centres.

Comparison Retailing

In terms of comparison goods, it is estimated that 2,960 sq m (net) of additional comparison retail floorspace is required to provide for growth and to retain more of residents' expenditure within the County Borough. This would create more employment and will also be in the interests of sustainability.

To address the unsatisfied demand, the Plan allocates land at Market Square and Market Street in the principal town centre of Ebbw Vale for comparison retailing. It is proposed that the remaining 1,060 sq m of additional comparison floorspace will be met through redevelopment schemes in the town centres.

Planning applications for edge of centre and out of town centre retail developments will be dealt with in accordance with national planning policy.

Detailed descriptions of the proposed retail sites can be found in the site descriptions document.

11.0 DEPOSIT PLAN CONSULTATION RESPONSES

11.1 The following section sets out the deposit plan consultation responses received and the Council's response to the issues raised.

Policy SP3: The Retail Hierarchy and Vitality and Viability of the Town Centres

Issue - Objects to Ebbw Vale performing a regional retail role and its impact on the other towns
The objector also questions where new businesses will relocate and that shops are closing in Abertillery even though £13 million is being invested**.**

Response
The Local Development Plan strategy is based on regenerating the area through the hub and spoke approach i.e. building a network of district hubs around the principal hub of Ebbw Vale. The creation of an integrated network of modern and revitalised hubs provides a mechanism to co-ordinate investment and ensures the benefits of growth and regeneration are shared widely to transform the whole of Blaenau Gwent.

Notwithstanding this, there remains an emphasis in terms of development in Ebbw Vale. This reflects the Wales Spatial Plan's identification of Ebbw Vale as a key settlement that has a critical role to play in the success of the Capital Region.

The revitalisation of Blaenau Gwent's town centres is an important priority of the Council. There are town centre action plans in place for the principal and district town centres, which identify regeneration schemes. There are also Holistic Regeneration Plans (HARPS) for each of the hub areas.

A key challenge for the Local Development Plan was that the town centre compete against each other and have no clear roles. Strategic policies 1 and 2 of the Deposit Plan identify new roles for the town centres.

Drawing upon these roles, the town centre managers have recently undertaken occupier reports and a marketing and branding exercise for each of the town centres. This will establish an accurate picture of the potential investors that could be attracted to the county boroughs town centres; and target and attract increased retail/mixed use/other investment to the town centres utilising a professional and consistent promotion method.

Issue - Criterion b of the policy implies a procedural action and not a land use policy

Response
It is agreed that the word explored in criterion 2b should be replaced with the word implemented to reflect a land use policy action. It is recommended to the Inspector that this issue be addressed through a minor change.

Issue - Criterion 1d should be proactive and provide for future neighbouring retail needs

Response
Policy SP3 is a strategic policy seeking to establish a retail hierarchy in order to meet future retail needs in a co-ordinated and sustainable manner. Policies MU1 and MU2 deal with the strategic growth areas in Ebbw Vale, both of which are supported by Masterplans which assess the development potential of the areas and identify key elements.

Issue - Ensure appropriate development is delivered to the identified centres

Response
It is agreed that appropriate development should be delivered to the identified centres. The selection of allocations was undertaken through a rigorous assessment process which assessed not only the developability of the site but also to ensure that the site is in accordance with the LDP strategy. One of the key elements of the LDP strategy is to ensure that appropriate development is delivered to the identified hubs which in turn support the role and growth of the town centre in that hub.

Issue - Comments that the area needs investment in its town centres

Response
The revitalisation of Blaenau Gwent's town centres is an important priority of the Council. This is reflected in policy SP3 which aims to deliver thriving town centres and protect local shopping facilities.

There are town centre action plans in place for the principal and district town centres, which identify regeneration schemes. A Regeneration Action Plan covers Blaina Local Town Centre. There are also Holistic Regeneration Plans (HARPS) for each of the hub areas.

In 2010-11, Blaenau Gwent Council secured £12.2 million to revitalise Ebbw Vale Town Centre and create an attractive hub for visitors and local people. £13 million for the regeneration of Abertillery town centre has also been secured. The spending programme for both towns will be implemented by 2015.

Blaenau Gwent in association with the Welsh Government Heads of the Valleys Programme has also carried out a number of regeneration projects in the Brynmawr area. These schemes have included; Market Hall Cinema, Commercial Improvement Grants, Hafod Arch improvement and Brynmawr RFC. The Council is also seeking funding to implement a number of schemes for the Brynmawr area in the near future, these include: Brynmawr Bus Station, Commercial Improvement Grants and the development of the former Welsh school site.

Over the past decade, £15 million of regeneration has been spent in Tredegar town centre. Currently there is a project underway to renovate Bedwellty House and Park. A Strategy and Action Plan is also being prepared for Tredegar and the HoV road corridor which will form the basis of a bid for Heritage Lottery Funding and the next round of European Funding expected in 2013-14.

Blaina town centre has also seen improvements in the establishment of a Chartist Information and Exhibition Centre at Salem Chapel.

Issue - Objects to Blaina's position in the retail hierarchy as a local town centre

Response
The Retailing Background Paper explains the rationale behind the formulation of the retail hierarchy. The Paper provides the criteria used to define a district town centre and a local town centre based on definitions in Planning Policy Wales and Planning Policy Statement 6 (ODPM, 2005). The definitions are not totally distinct and are based on size and the types of facilities within a centre.

Data from the annual town centre health checks was used to assist with the defining of the retail hierarchy particularly with regard to the number of units within the town centre boundary and the percentage of different types of uses. The data for the Principal and District Town Centres clearly reflect the larger town centres, with the number of ground floor units within the town centre boundary being 139 units or more. Blaina Local Town Centre is half the size with only 64 units within the town centre boundary. So in terms of size meets the requirements of a local town centre.

There are clear distinctions between the different types of uses operating between the identified Principal and District town centres to that of Blaina Local Town Centre. For example all of the Principal and District Town Centres have at least two banks and building societies operating, a library and national multiple retailers. However, Blaina has no banks or building societies, the library is located on the edge of town, there are no national multiple retailers instead the shopping experience is one of convenience and day to day shopping. The weekly average footfall movement is also considerably lower in Blaina with approximately 6,000 movements. This compares to 14,000 in Brynmawr and 10,000 in Tredegar.

It is also worth reflecting that policy SP3 does not pay less regard to centres identified as local town centres. Local town centres are recognised as forming an important part of Blaenau Gwent's retail hierarchy and of its social, economic and physical fabric.

Issue - Objects to Brynmawr's position in the retail hierarchy
Objector contends that the criteria used to define a District Shopping Centre in the Local Development Plan can only be applied to Lakeside Retail Park. Brynmawr town centre has no more of a claim to be a District Town Centre than that of the central shopping area of Blaina.

Response
A key theme of the Plan is to deliver thriving town centres and protect local shopping facilities as town centres form an important part of Blaenau Gwent's social, economic and physical fabric. Therefore in order to meet future retail needs in a co-ordinated and sustainable manner a retail hierarchy of town and local shopping centres has been established.

The Retailing Background Paper explains the rationale behind the formulation of the retail hierarchy. Lakeside Retail Park does not fit within this rationale. The Retail Park is an edge of centre retail development that comprises of 7 retail units. The retail units are national retailers, 6 of which are comparison and the remainder is a convenience store. This does not meet the definition of a district centre, as a district centre should also comprise of non-retail uses and public facilities.

Brynmawr town centre clearly fits the criteria of a district centre as set out in the Retailing Background Paper. Brynmawr has 91 more retail units than Blaina, a higher level of weekly average footfall (8,000 movements more) and a range of shops, non retail uses and public facilities such as a library and cinema.

Issue - Comments that town centres should be maintained, improved, conserved and protected

Response
The revitalisation of Blaenau Gwent's town centres is an important priority of the Council. This is reflected in policy SP3 which aims to deliver thriving town centres and protect local shopping facilities.

The Local Development Plan concentrates on land use related issues. Part two of this Strategic Policy identifies land use related measures to improve the vitality and viability of the town centres.

There are town centre action plans in place for the principal and district town centres, which identify regeneration schemes. A Regeneration Action Plan covers Blaina Local Town Centre.

Whilst this plan recognises the issues and provides land to deal with them there are other Strategies such as the Community Plan (Making a Difference – A Community Strategy for Blaenau Gwent (2010-2030)), and the Regeneration Strategy all working to create a better place to live, work and visit.

Policy: DM6 Use Class Restrictions in Principal and District Town Centres

Two comments of support were received to this policy.

Policy: DM7 Use Class Restrictions in Blaina Local Town Centre

Issue - Objects to allowing residential development within Blaina town centre

Three representors raised this issue and objected to allowing residential development within Blaina Town Centre. Nantyglo and Blaina Council argue that this will place the High Street at a distinct disadvantage to other towns and over time will transfer the only shopping centre with a record of growth within Blaenau Gwent into an irregular pattern leading to the eventual collapse of the local economy of the High Street. Blaina Communities First also questions how genuine efforts to market the premises would be determined.

The Retailing Background Paper sets out the evidence base for the approach taken on Blaina Local Town Centre. The town centre is a small town (61 properties) with a high vacancy rate of nearly 22% (July 2009). This vacancy rate increased further in July 2010 to reach 29.5% and although declining slightly in July 2011 to 24.6% a quarter of all properties in Blaina are vacant.

It is accepted that between 2006 and 2009 there was a slight increase (of 7%, 4 units) in the percentage of A1 uses in Blaina town centre whilst the other town centres have declined marginally. However, in July 2011 it was recorded that Blaina town centre has experienced a 5% loss in the number of A1 units compared to the July 2010 survey results. An update of the Retailing Background Paper (2011) sets out the results of the latest town centre surveys.

It is clearly evident that there have been a number of vacant units within Blaina town centre which have failed to attract investment from the commercial sector. Hence in 2007 and 2008 planning permission was granted for the change of use of retail units to residential.

The purpose of criterion b is to ensure that there is flexibility to consider the appropriate reuse of redundant units and to allow them to convert back to residential use if there is no market or demand for a retail or commercial use. Vacant units can have a significant impact on the appearance and the amenity of an area and can harm the wider regeneration objectives.

It is essential that a balance is struck between ensuring the release of redundant retail premises and protecting retail units for their economic and social benefits. DM7 will ensure that redundant retail premises are released for alternative uses where it is demonstrated that they are genuinely redundant and no longer deliver wider benefits to the community.

With regard to the issue raised on marketing the premises, it is agreed that clarity is required on this matter. However, it is considered that this policy should not be overly prescriptive on this matter as the evidence submitted with a planning application needs to be considered on a case-by-case basis.

It is recommended that criterion b of policy DM7 and paragraph 7.58 should be amended to provide clarity. It is recommended to the Inspector that this issue be addressed through a minor change.

Issue - Object that no primary retail area has been identified for Blaina Local Town Centre

Response
The Retailing Background Paper explains the rationale behind the formulation of primary retail areas in the town centres. As set out in Planning Policy Wales, primary retail areas are characterised by a high proportion of retail A1 uses. In July 2009 the record of A1 uses within Blaina Town Centre was 27% (17 units) which is significantly less than the other town centres where the average number of A1 units were 60. It is also important to note that in July 2011 it was recorded that Blaina town centre has experienced a 5% loss in the number of A1 units compared to the July 2010 survey results. The updated Retail Background Paper provides the results of the Annual Town Centre Surveys undertaken in 2010 and 2011.

The purpose of a Primary Retail Area in the Local Development Plan is to protect the retail core of the town centres. The clustering of A1 uses is considered beneficial for the vitality, viability and attractiveness of the town centres. Within Blaina town centre, there is considered to be no clustering of A1 uses and hence no retail core as the A1 uses are located sporadically throughout the town centre amongst other types of uses.

12.0 FOCUSSED CHANGES

12.1 Following consideration of the representations received, the following sections sets out the proposed changes the Council proposes to make to the Local Development Plan in relation to retailing.

Focussed Changes

12.2 It is proposed to make no Focussed Changes

Minor Changes

12.3 The following minor changes are proposed:

MC.7 Amend Policy SP3 criterion 2b to read as follows:
Opportunities to improve the retail off will be **implemented**

MC.17 Amend Policy DM7 criterion b to read as follows:
In the case of a change of use to residential, the unit must have been vacant for a minimum of 12 months and/or genuine efforts have been made to market the premises for **retail/commercial use**.

Amend paragraph 7.58 as follows:

Planning applications for the change of use to residential would need to be supported by evidence of a 12 month history of vacancy and/or a lack of response to genuine efforts to market the premises **for retail/commercial use** over a significant period. **The Council will closely scrutinise the evidence put forward to demonstrate that the units are no longer required for retail purposes.**

APPENDICES

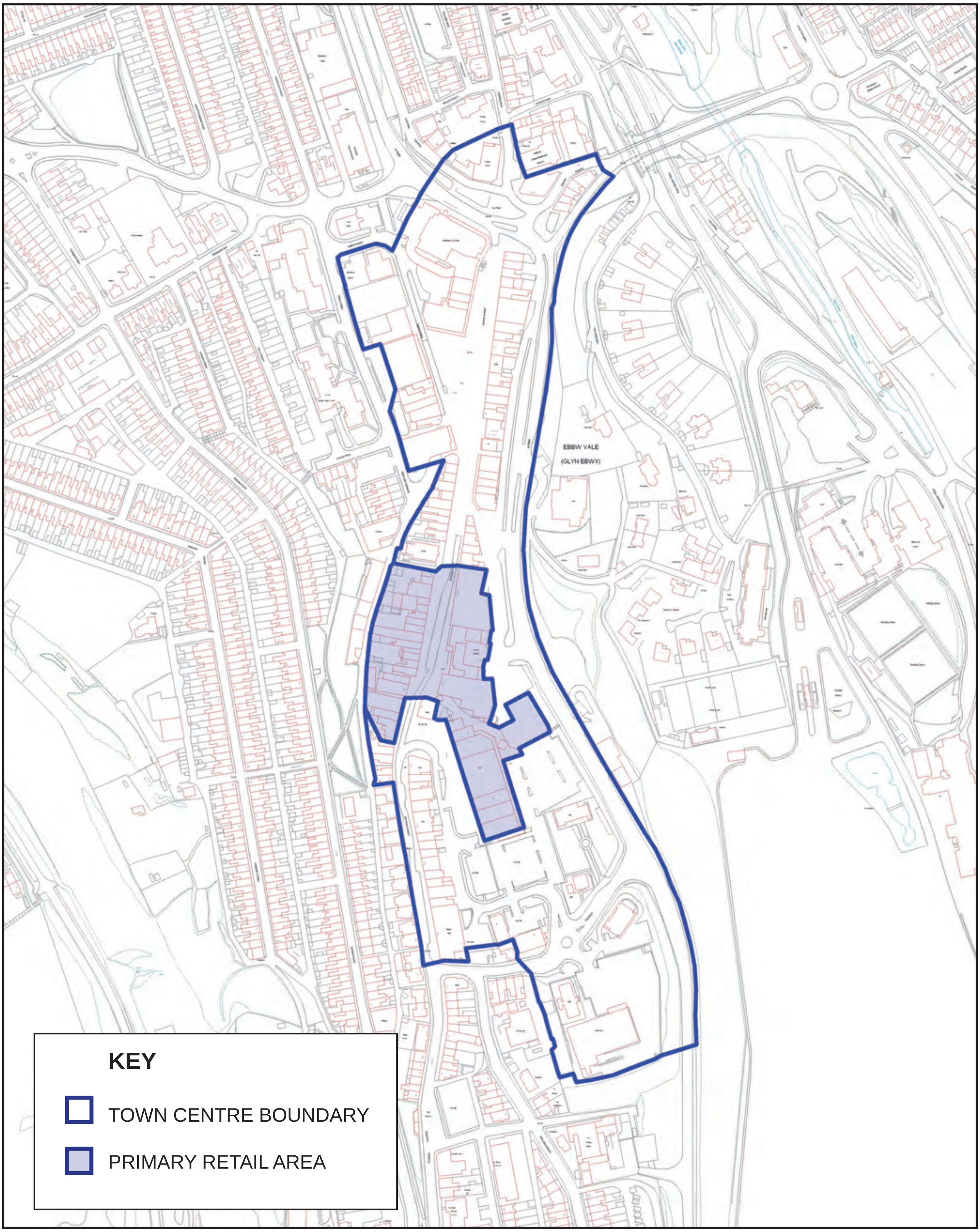
APPENDIX 1: USE CLASSES ORDER

Term	Definition
A1 Shops	The retail sale of goods to the public: Shops, Post Offices, Travel Agencies & Ticket Agencies, Hairdressers, Funeral Directors, Domestic Hire Shops, Dry Cleaners, Internet Cafes, Sandwich Bars (where sandwiches or other cold food are to be consumed off the premises).
A2 Financial & Professional Services	Financial Services: Banks, Building Societies & Bureau de Change. Professional Services (other than Health or Medical Services): Estate Agents & Employment Agencies. Other services where it is appropriate to provide in a shopping area: Betting Shops. (Where the services are provided principally to visiting members of the public.
A3 Food and Drink	Restaurants, pubs, snack bars, cafes, wine bars, shops for sale of hot food, takeaways
B1 Business	Offices, other than a use within class A2 (Financial Services). Research and development of products or processes and light industry.
B8 Storage and Distribution	Use for storage or distribution centre
C3 Dwelling Houses	Use as a dwelling house (whether or not as a sole or a main residence), a. by a single person or people living together as a family, or b. by not more than six residents living together as a single household (including a household where care is provided for residents).
D1 Non residential institutions	Clinics & Health Centres, Crèches, Day Nurseries & Day Centres, Museums, Public Libraries, Art Galleries & Exhibition Halls, Law Court, Non-Residential Education & Training Centres, Places of Worship, Religious Instruction & Church Halls
D2 Assembly & Leisure	Cinema, Concert Hall, Bingo Hall, Dance Hall, Swimming Bath, Skating Rink, Gymnasium or area for indoor or outdoor sports or recreation, not involving motor vehicles or firearms
Sui Generis (SG)	Uses, which do not fall wholly within a Use Class, are considered ‘sui generis’ and require planning permission to change to another use. Includes, Theatres, Nightclubs, Retail Warehouse Clubs, Amusement Arcades, Laundrettes, Petrol Filling Stations and Motor Car Showrooms

Appendix 3

Date : 18/01/2010	Blaenau Gwent Retailing Background Paper	Blaenau Gwent County Borough Council Regeneration Division
Scale : 1:2000	Town Centre Boundaries & Primary Retail Areas	

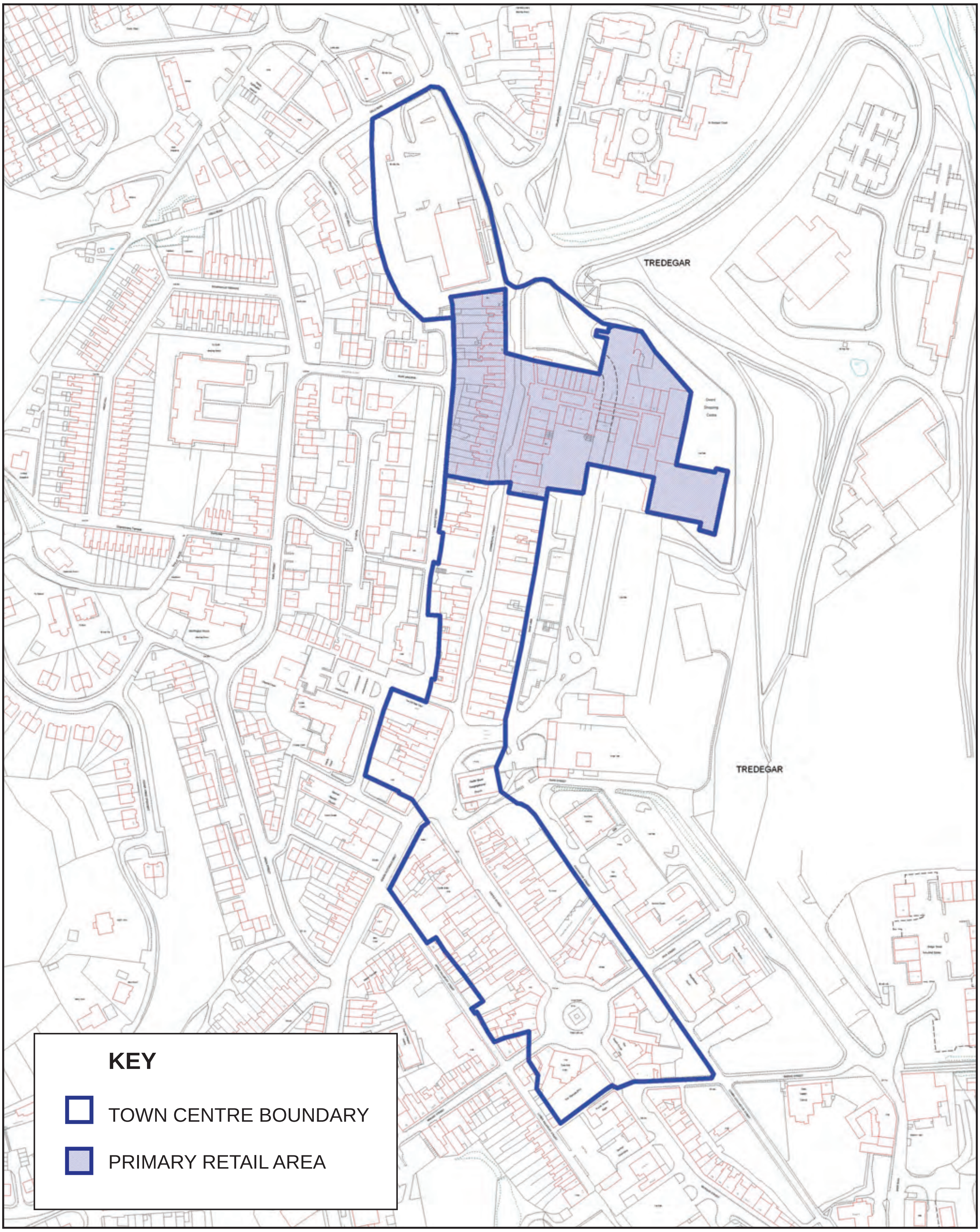
Town Name: Ebbw Vale



Appendix 3

Date : 18/01/2010	Blaenau Gwent Retailing Background Paper	Blaenau Gwent County Borough Council Regeneration Division
Scale : 1:3000	Town Centre Boundaries & Primary Retail Areas	

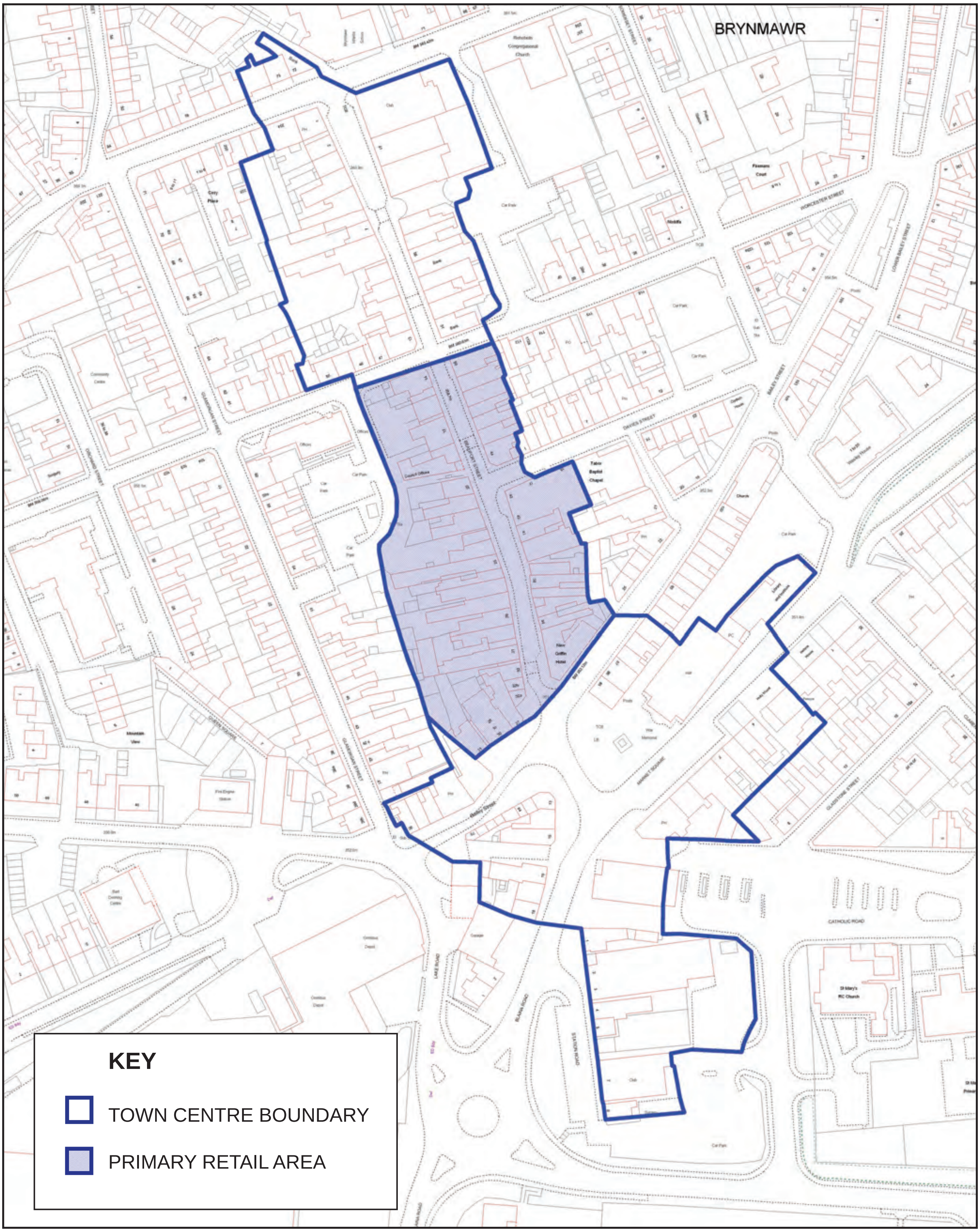
Town Name: Tredegar



Appendix 3

Date : 18/01/2010	Blaenau Gwent Retailing Background Paper	Blaenau Gwent County Borough Council Regeneration Division
Scale : 1:2000	Town Centre Boundaries & Primary Retail Areas	

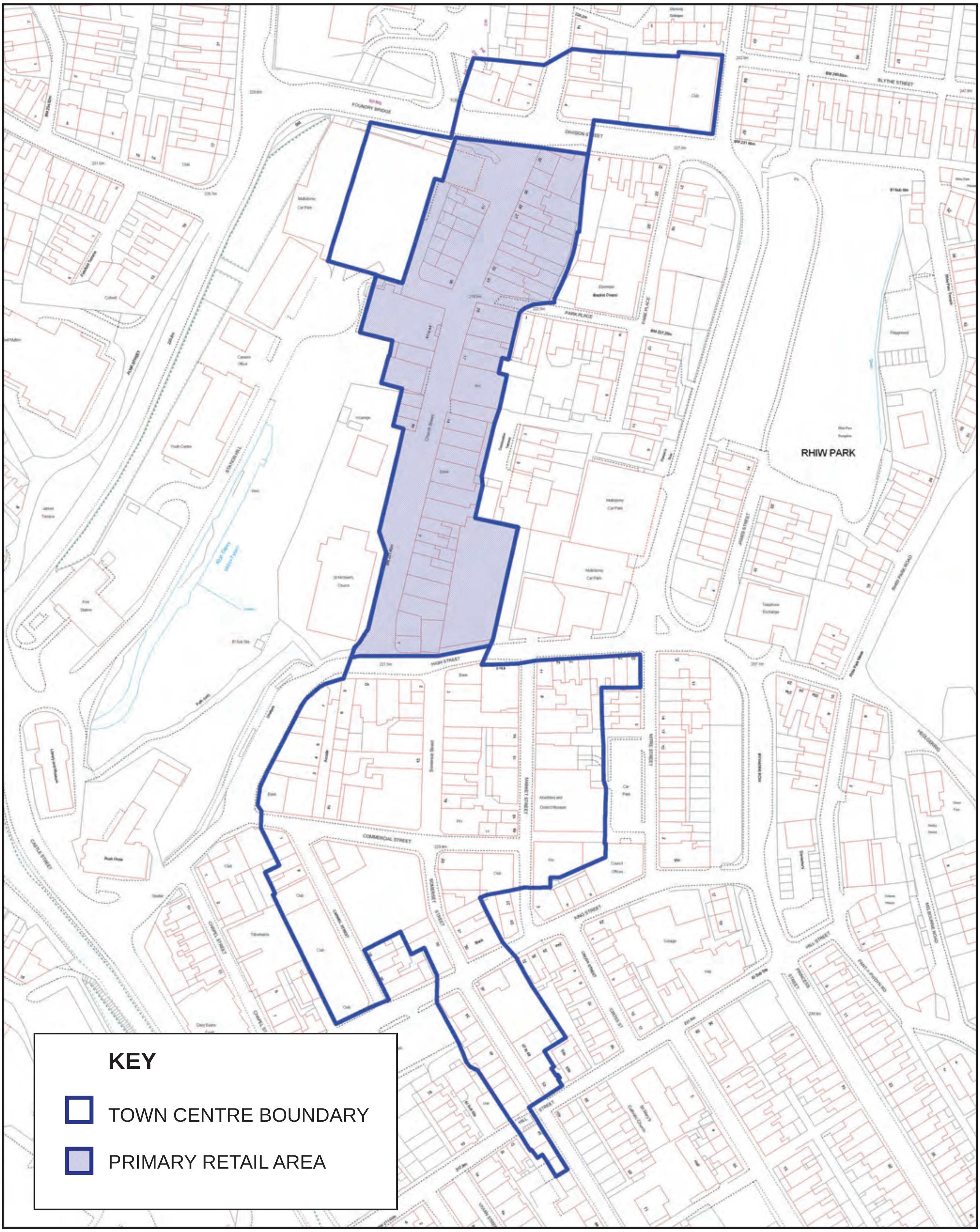
Town Name: Brynmawr



Appendix 3

Date : 18/01/2010	**Blaenau Gwent Retailing Background Paper**	Blaenau Gwent
Scale : 1:2000	**Town Centre Boundaries & Primary Retail Areas**	Regeneration Division

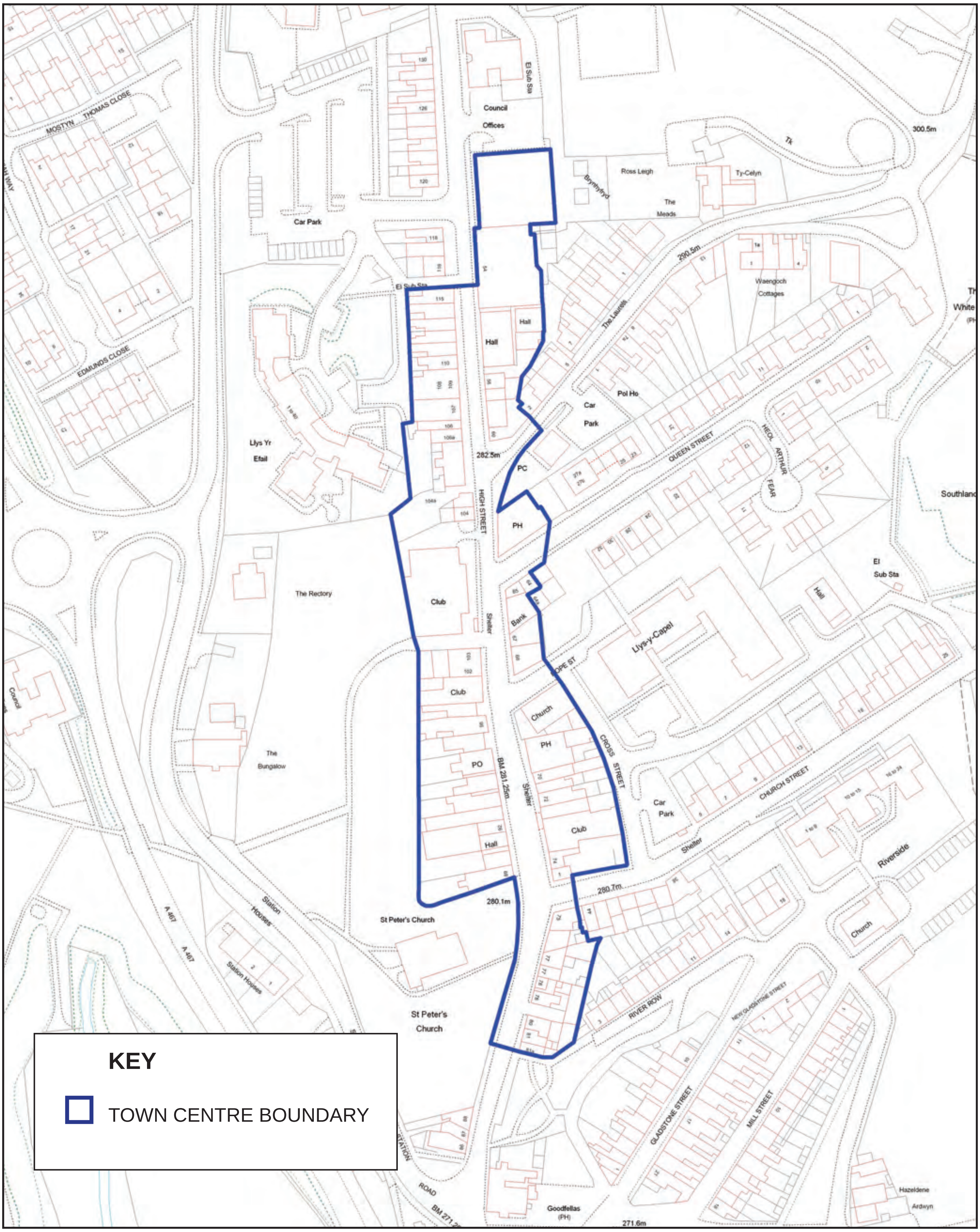
Town Name: Abertillery



Appendix 3

Date : 18/01/2010	Blaenau Gwent Retailing Background Paper	Blaenau Gwent County Borough Council
Scale : 1:2000	Town Centre Boundaries & Primary Retail Areas	Regeneration Division

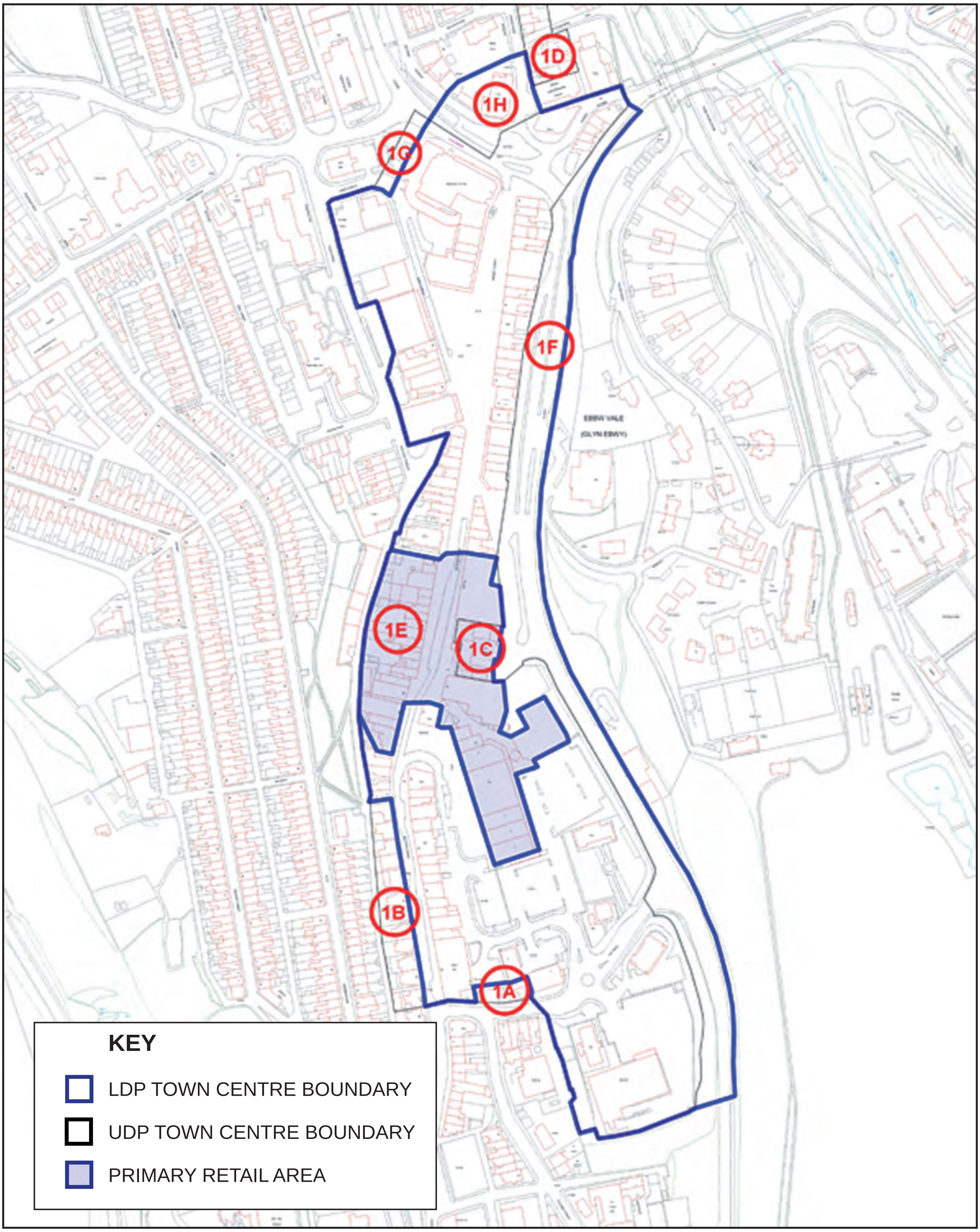
Town Name: Blaina



Appendix 2

Date : 18/01/2010	**Blaenau Gwent Retailing Background Paper**	Blaenau Gwent Regeneration Division
Scale : 1:3500	**Town Centre Boundary Ammendments**	

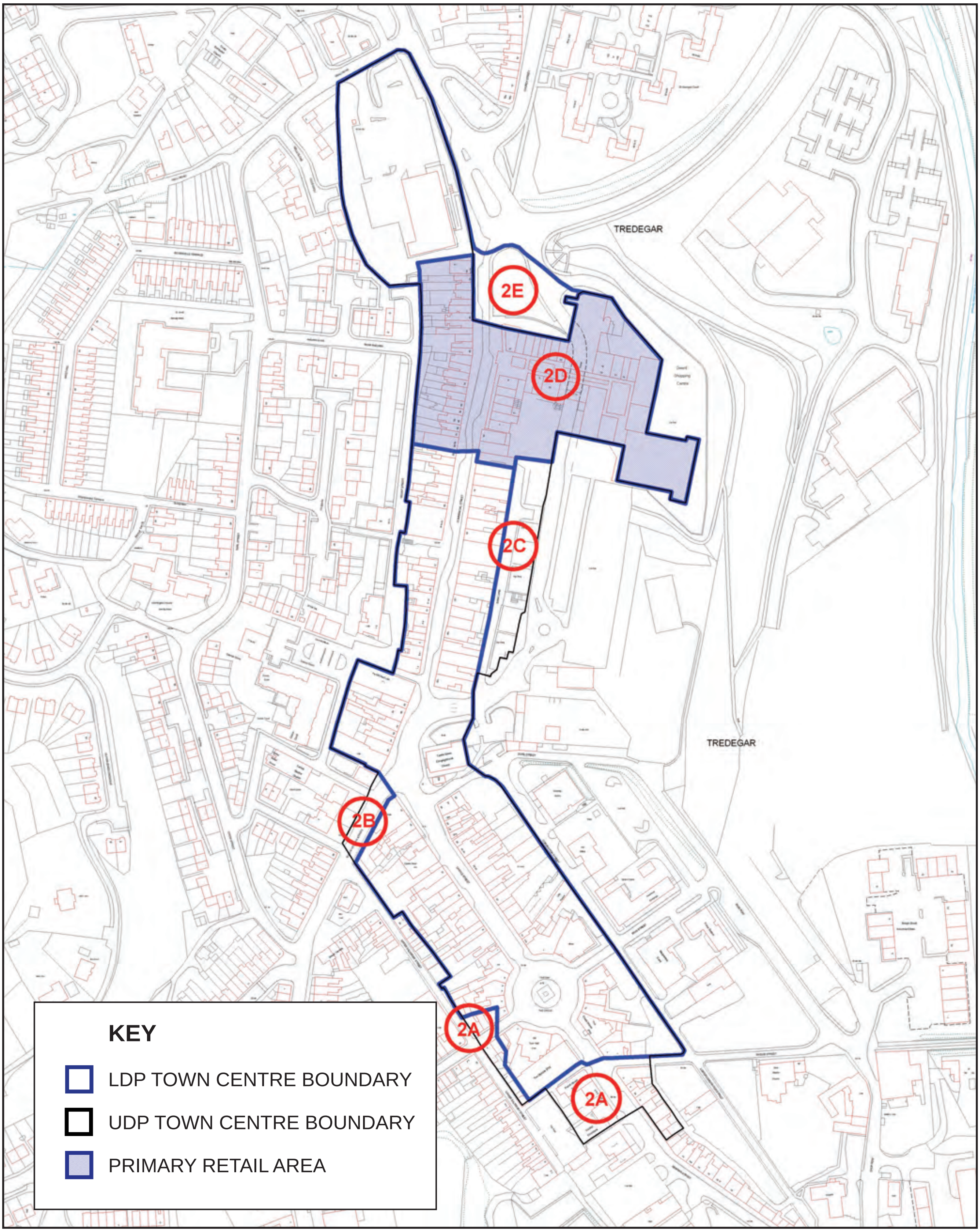
Town Name: Ebbw Vale



Appendix 2

Date : 18/01/2010	Blaenau Gwent Retailing Background Paper	Blaenau Gwent Regeneration Division
Scale : 1:3500	Town Centre Boundary Ammendments	

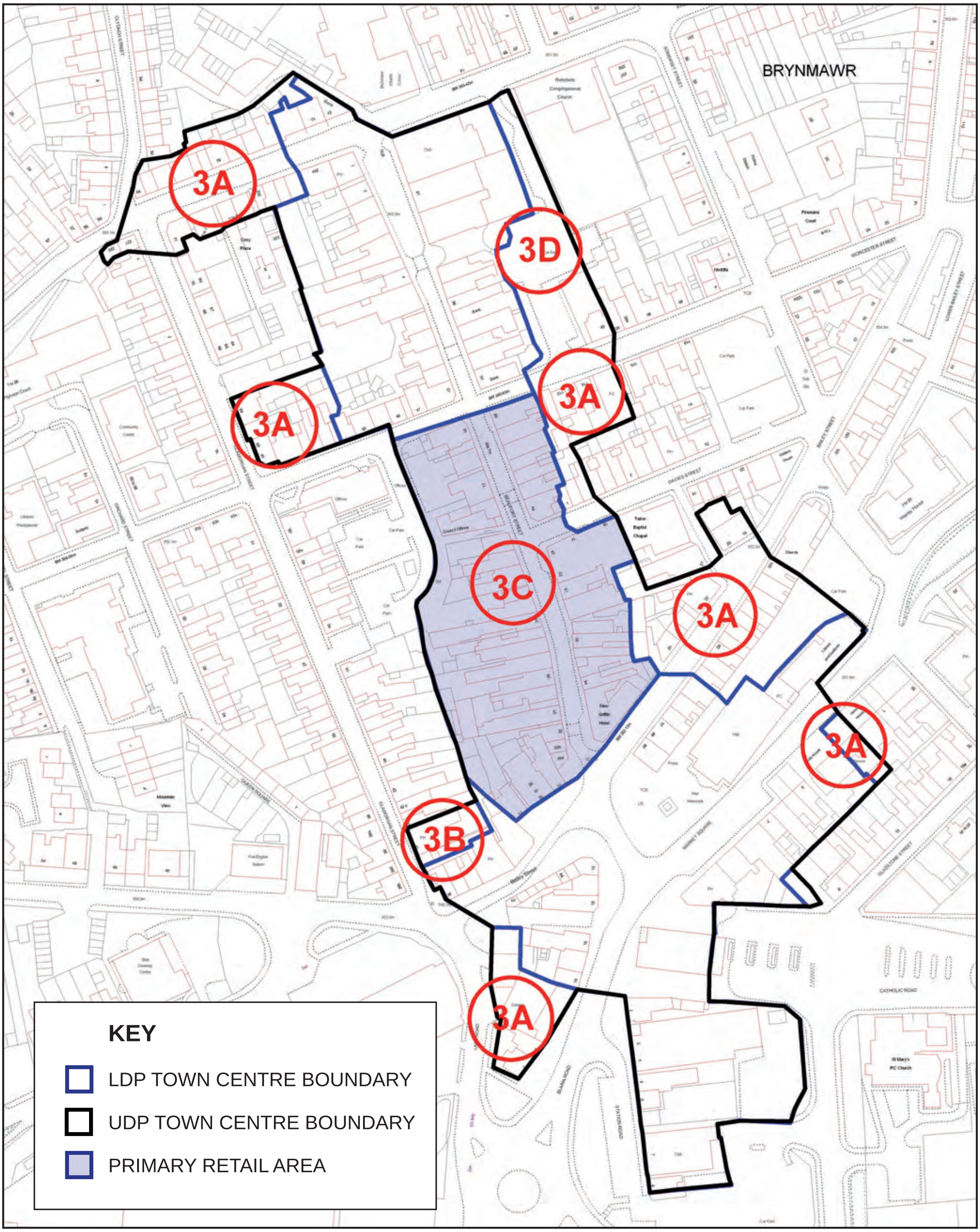
Town Name: Tredegar



Appendix 2

Date : 18/01/2010	Blaenau Gwent Retailing Background Paper	Blaenau Gwent County Borough Council
Scale : 1:2000	Town Centre Boundary Ammendments	Regeneration Division

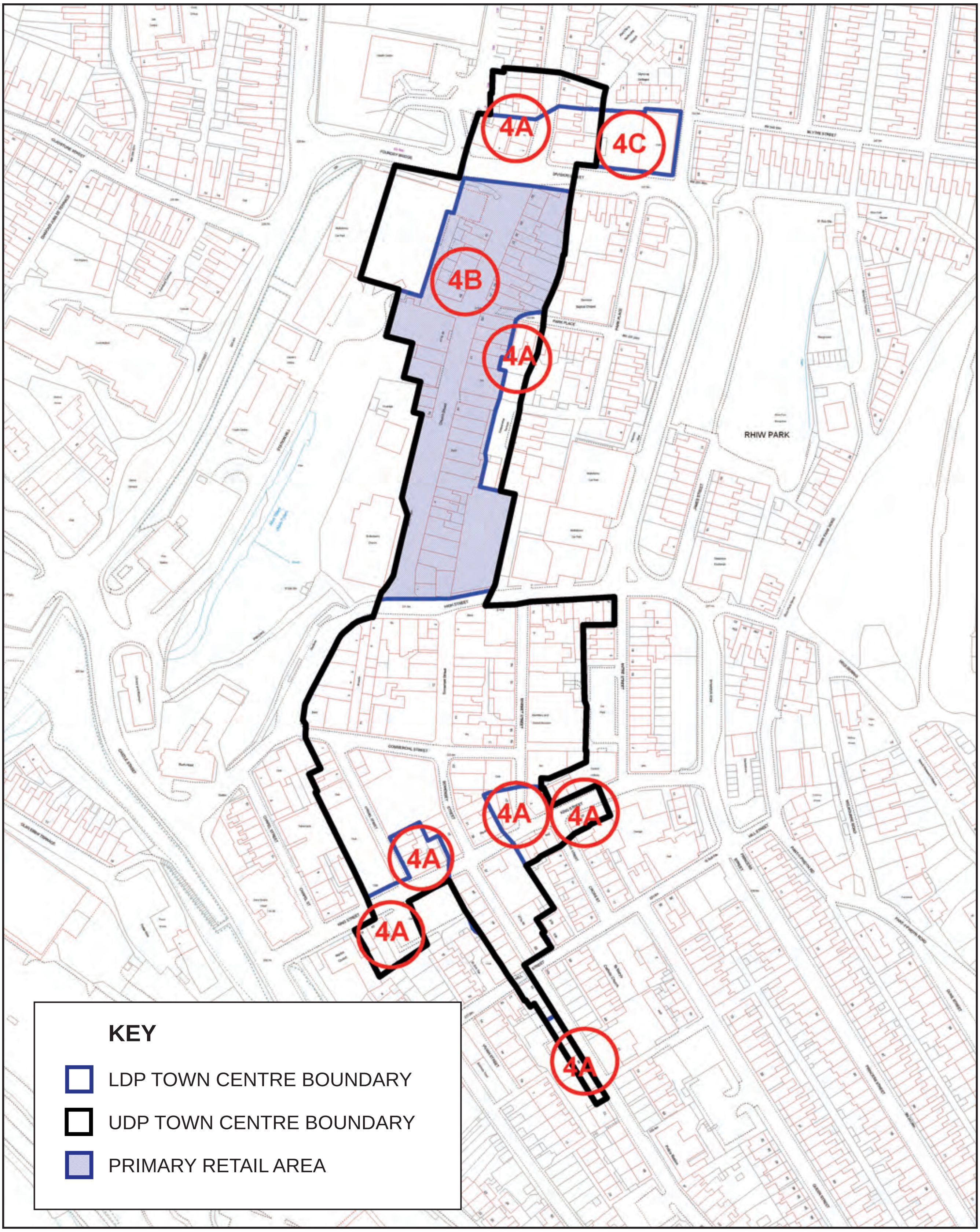
Town Name: Brynmawr



Appendix 2

Date : 18/01/2010	**Blaenau Gwent Retailing Background Paper**	Blaenau Gwent Regeneration Division
Scale : 1:2500	**Town Centre Boundary Ammendments**	

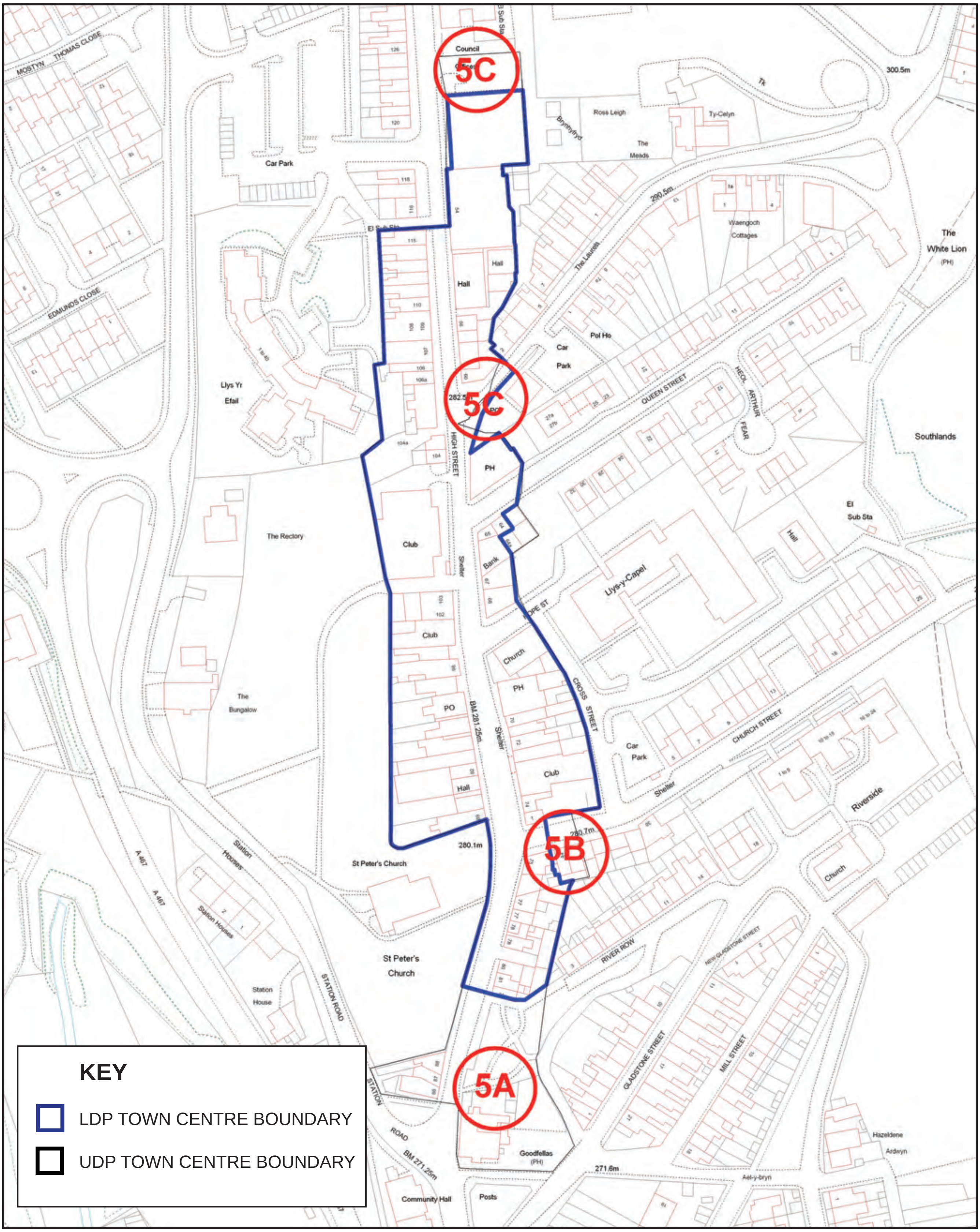
Town Name: Abertillery



Appendix 2

Date : 18/01/2010	Blaenau Gwent Retailing Background Paper	Blaenau Gwent County Borough Council
Scale : 1:2000	Town Centre Boundary Ammendments	Regeneration Division

Town Name: Blaina



For further Information please contact:

Planning Policy Team
Blaenau Gwent County Borough Council
Business Resource Centre
Tafarnaubach Industrial Estate
Tredegar, Blaenau Gwent
NP22 3AA

Tel. 01495 354740/355538/355544/355501
email. planningpolicy@blaenau-gwent.gov.uk
or visit www.blaenau-gwent.gov.uk

Cyngor Bwrdeisdref Sirol
Blaenau Gwent
County Borough Council