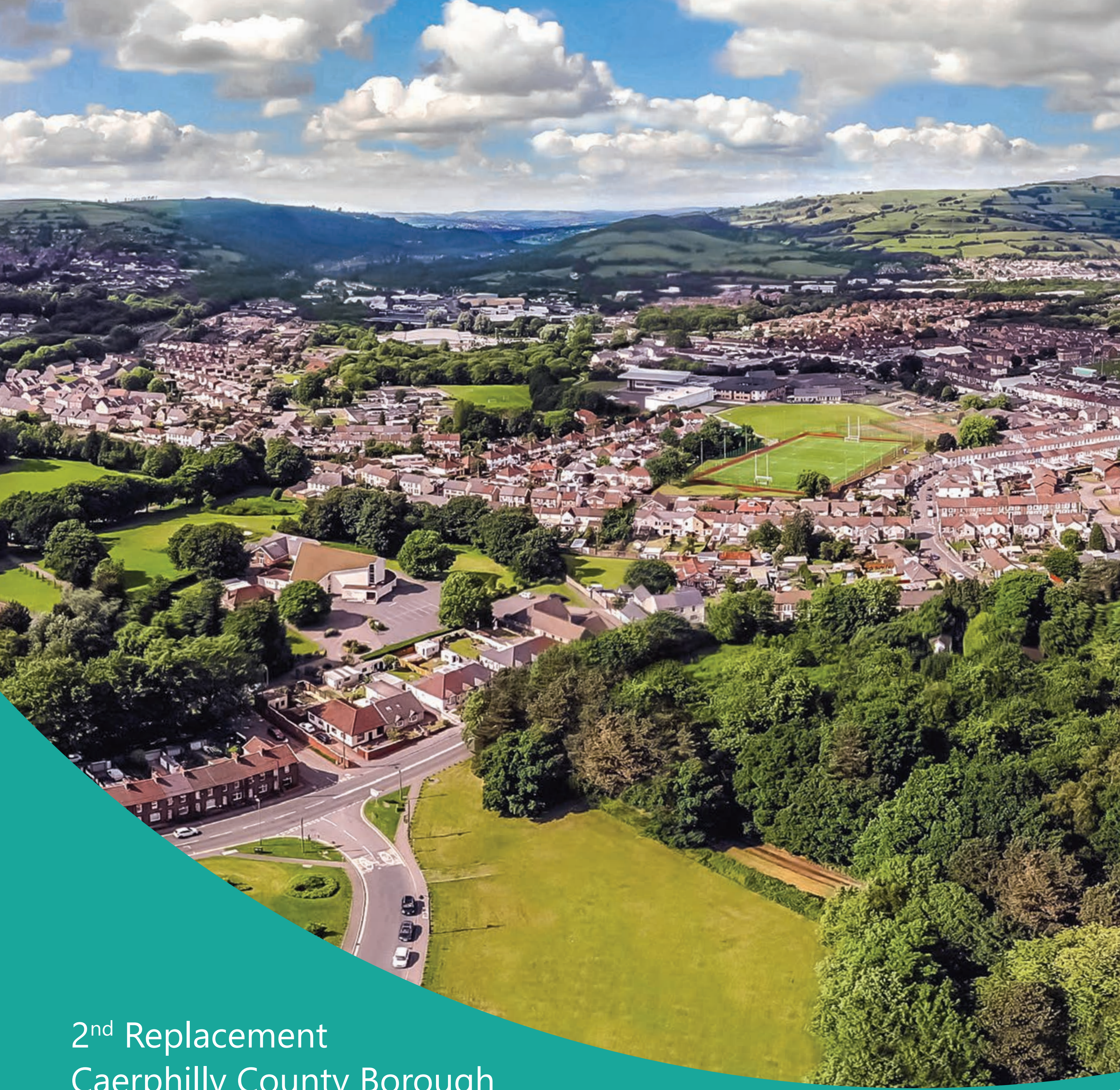


2nd Replacement
Caerphilly County Borough
Local Development Plan up to 2035

PS17 Retail Capacity Study

October 2022

CAERPHILLY
COUNTY BOROUGH COUNCIL
CYNGOR BWRDEISTREF SIROL
CAERFFILI

Mae'r ddogfen hon ar gael yn Gymraeg, ac mewn ieithoedd a fformatau eraill ar gais.

This document is available in Welsh, and in other languages and formats on request.

PS17

Celebrating 60 years

Caerphilly Retail Capacity Study
Final Report

Caerphilly County Borough Council

3 August 2022

LICHFIELDS

LICHFIELDS

Lichfields is the pre-eminent planning and development consultancy in the UK

Celebrating 60 years
of innovation in planning.

lichfields.uk

64320/01/PW/ACo
25682570v1

Contents

1.0 Introduction

1.1 Caerphilly County Borough Council commissioned Lichfields to prepare a Retail Capacity Study for the County Borough, including the main centres of Caerphilly, Blackwood, Bargoed, Ystrad Mynach, Risca/Pontymister and Rhymney. This study informs policy relating to town centre, retail and leisure matters in the County Borough, together with a wider strategy for the future of the Borough's centres likely to be up to 2035. It will form part of the Council's evidence base in progressing the review of the Local Development Plan (LDP).

Aims and objectives of the Study

1.2 The key objectives of the study as set out in the Study Brief are as follows:

1. to undertake an analysis of key trends regarding retailing and town centre activity to provide context;
2. to consider the up-to-date position in respect of relevant retail and town centre planning policy, particularly with reference to Future Wales, Planning Policy Wales and TAN 4;
3. to provide an overview of the County Borough's town and retail centres in terms of relevant indicators and accompanying data sources, within the context of a UK and Southeast Wales hierarchy of centres;
4. a quantitative retail need assessment for convenience and comparison goods relating to the period of the 2nd Replacement LDP (2020-2035), utilising those data sources as set out by TAN 4;
5. an assessment or judgement of qualitative need for new retail floorspace, taking account of relevant factors additional to theoretical (quantitative) capacity;
6. assessments of the potential for other town centre uses (e.g. commercial leisure, A3 uses, public services) within the context of Future Wales 'town centre first' policy;
7. identify the implications for the County Borough's town centres in terms of floorspace projections, the hierarchy of centres and town centre boundaries;
8. to provide policy recommendations in respect of the sequential approach to retail as contained in PPW, and additional town centre uses as advanced by Future Wales; and
9. to provide an evidence base that is sufficiently robust to withstand the LDP examination process and sufficient to support development management decisions.

Report structure

1.3 Section 2 of this report provides an overview of trends and recent changes that will affect the demand for main town centre uses. The appropriate policy and strategy approach for the County Borough should reflect these underlying trends.

1.4 Section 3 examines the existing hierarchy of centres within the sub-region. Appendix 5 provides more detailed centre health checks for the six main centres in the County Borough and an audit of the smaller designated centres.

1.5 Section 4 sets out an update of the retail and food/beverage floorspace capacity assessment based on the latest available population and expenditure projections.

1.6 Section 5 updates the assessment of other main town centre uses including the scope for leisure, entertainment and cultural uses.

1.7 Section 6 reviews potential policy options for future development plan policy taking account of updated floorspace capacity projections.

1.8 Section 7 summarises the main conclusions and recommendations.

2.0 National Policy and Recent Trends

National Planning Policy

Planning Policy Wales

2.1 National Planning Policy can be found in Planning Policy Wales [PPW] (11th Edition, February 2021). The document sets out the planning policies of the Welsh Government. The primary objective of PPW is to ensure that the planning system contributes towards the delivery of sustainable development and improves the social, economic, environmental and cultural well-being of Wales.

2.2 Placemaking lies at the heart of PPW. PPW states on page 14 that:

"Placemaking" is a holistic approach to the planning and design of development and spaces, focused on positive outcomes. It draws upon an area's potential to create high quality development and public spaces that promote people's prosperity, health, happiness and well-being in the widest sense…Placemaking adds social, economic, environmental and cultural value to development proposals resulting in benefits which go beyond a physical development boundary and embed wider resilience into planning decisions."

2.3 PPW outlines that Local service centres should be designated by local authorities as the preferred locations for most new development. Paragraph 4.3.2 states:

"Retail and commercial centres should be identified in development plans and include established city, town, district, local, village and neighbourhood centres, which provide a range of shopping, commercial and leisure opportunities as well as places of employment, education, civic identity and social interaction. Opportunities to live in these centres, combined with their good public transport links, make them the most sustainable places."

2.4 On retail and commercial centres, paragraphs 4.3.5 to 4.3.6 state:

"Planning authorities should establish through their development plan a clear strategy for retail development, supported by policies, to achieve vibrant, attractive and viable retail and commercial centres. The strategy and policies should set out a framework for the future of retail and commercial centres in their area, taking into account strategies in adjoining authorities, to promote a successful retailing sector supporting existing and new communities.

Retail and commercial centres will experience growth and decline, and development plans should identify these changing retail pressures and opportunities and devise appropriate responses to them in their retail strategies. In some situations it may be necessary to take pro-active steps to identify retail and commercial centre locations for expansion. In others it may be necessary to identify measures to reinvigorate centres or to manage a change in the relative importance of a centre as other centres' roles expand. Strategies and supporting policies should be based on robust evidence."

2.5 PPW promotes establishing a hierarchy of retail and commercial centres taking account of the size, scale, form and function of commercial centres. When considering locations for new retail and commercial provision, a qualitative assessment should consider both positive and negative aspects and may be an important consideration where it:

- supports the objectives and retail strategy of an adopted development plan or the policies in this guidance;
- is highly accessible by walking, cycling or public transport;
- contributes to a substantial reduction in car journeys;
- contributes to the co-location of facilities in existing retail and commercial centres;
- significantly contributes to the vibrancy, attractiveness and viability of such a centre;
- assists in the alleviation of over-trading of, or traffic congestion surrounding, existing local comparable stores;
- addresses locally defined deficiencies in provision in terms of quality and quantity, including that which would serve new residential developments; or where it;
- alleviates a lack of convenience goods provision in a disadvantaged area.

2.6 PPW further states that first preference should be to locate new retail and commercial development within a retail and commercial centre designated in the development plan's hierarchy of centres.

2.7 On enabling vibrancy of centres, PPW paragraph 4.3.35 states that:

"Achieving diversity of uses and activities may require a flexible approach to planning. Where the right balance of use and activity is not being achieved, planning authorities should consider making changes to the acceptable uses in primary or secondary areas, or the retail and commercial centre boundaries themselves."

2.8 This points towards the need to secure more diverse town centres where a range of uses are acceptable.

Future Wales: The National Plan 2040

2.9 Future Wales was published in February 2021 and forms part of the development plan. It is a development plan with a strategy for addressing key national priorities through the planning system.

2.10 Policy 6 of Future Wales reinforces the town centre first approach. However, this policy covers more than just retail and states that *'significant new commercial, retail, education, health, leisure and public service facilities must be located within town and city centres'* and that a sequential approach must be followed. This chimes with the recently published Active Travel Wales Guidance (2021), Placemaking Guide (2020) and Planning Policy Wales Edition 11 (PPW11), in placing placemaking and the promotion of active travel in line with social inclusion at the forefront of new town centre development.

2.11 The supporting text to this policy explains this approach applies to developments of a significance scale, which can broadly be defined as where the facility will serve a town, city or region-wide catchment. However, it is up to local authorities to determine whether a development is considered of a significant scale.

2.12 In terms of how this policy is applied we would suggest that each development is assessed on its own merit against a set of criteria that could be established in the replacement LDP. This could look at matters such as:

1 The quantum and nature of the use;

2 Whether it is a use that would be acceptable in the town centre without having an unacceptable impact on existing operators and residents;

3 Whether there are specific reasons why it cannot locate in the town centre (i.e. the need for significant floorspace that is not available or that the use requires a particular transport mode that is not appropriate to the town centre);

2.13 We would suggest that it is up to the applicant to provide robust justification as to why it cannot locate within the town centre.

2.14 The policy can also be used during the plan making process when allocating sites for commercial, retail, education, health, leisure and public services. A sequential approach should be followed to ensure that the benefits of the use can be realised within or as close as possible to the town centre. This policy is key to ensuring that town centres are integrated with day to day uses and this provides the opportunity to meet placemaking and sustainability policies set out in Future Wales and PPW.

2.15 However, pragmatism will be required where there is a development proposal that clearly needs to be located outside the town centre. The social and economic benefits of a proposal should not be dismissed just because there is a lack of sites in and on the edge of town centres and in some circumstances the use will not be appropriate in that location. In instances such as this it will be important to ensure that the sites are able to be reached via sustainable modes of transport including walking and cycling. For the smaller centres it will be important to balance the overall benefits of the proposal being located outside of the town centre.

2.16 The Borough sits within the Future Wales Cardiff, Newport and the Valleys National Growth Area (Policy 33) and this should be considered when considering whether additional retail growth is appropriate for the Borough during the next plan period. It will be necessary to consider whether the town centres need to grow or whether they need to evolve to meet current retail and leisure trends and whether the quantum and nature of the units present are sufficient to allow this or whether new allocations should be made.

Building Better Places: The Planning System Delivering Resilient and Brighter Futures Recovery (July 2020)

2.17 *Building Better Places: The Planning System Delivering Resilient and Brighter Futures recovery* was published in July 2020. This document sets out the Welsh Government's planning policy priorities to assist in taking action in the recovery period after the Covid-19 pandemic crisis. It seeks to ensure that the planning system remains centre stage in the consideration of built and natural environment issues that have arisen from this situation.

2.18 In this document the Welsh Government highlights the key existing planning policies and tools which should be used by all sectors in the environmental, social, cultural and economic recovery of Wales, recognising the continuing need for Planners to operate within a wider context of priorities and action at all scales.

2.19 PPW contains policy statements from the Welsh Government on a variety of planning issues and topics; which remain relevant and should be considered as a whole by local planning authorities and the development sectors. However, in the immediate post Covid-19 period there will be areas of policy that should be the focus of consideration and action, to act as a catalyst for a recovery across the pillars of sustainable development.

2.20 PPW demonstrates that policy areas work more effectively when they are considered together to get the maximum benefit. The key issues relating to town centres that bring individual policy areas together to ensure that action is the most effective are:

- *Staying local: creating neighbourhoods*
- *Active travel: exercise and rediscovered transport methods*
- *Revitalising our town centres*
- *Digital places – the lockdown lifeline*
- *Reawakening Wales' tourism and cultural sectors*

2.21 Each issue draws out the pertinent points of PPW with commentary on specific aspects of the potential post Covid-19 pandemic situation.

Permitted Development within Town Centres

2.22 In the summer of 2021 temporary permitted development rights (Classes C-E, Part 4A) came into force which allowed town centre A1 uses to change to A2, A3, B1, D1 or D2 for a 6-month trial period. According to the Welsh Government this was so that retail and commercial centres could adapt to future retail trends to continue to meet the needs of local communities, especially due to the impact of Covid-19. The Welsh Government has recently consulted on whether to make this permitted development permanent and it has clarified that the 6-month trial period is proposed to be removed, allowing change of uses to be retained in perpetuity. The WG has also committed to a wider piece of ongoing work with regards to the Use Class Order in Wales, TAN4 and PPW.

2.23 The rapid changes that are affecting the retail sector and town centres are acknowledged and reflected in Future Wales, PPW (Edition 11), Building Better Places and temporary permitted development rights for town centre uses introduced by Welsh Government. These recognise that diversification is key to the long-term vitality and viability of town centres, to respond to rapid changes in the retail and leisure industries. Accordingly, planning policies should clarify the range of uses permitted in such locations, as part of a positive, modern strategy for the future of each centre.

Cardiff Capital City Region

2.24 The Cardiff Capital City Region includes Caerphilly and 9 other local authorities and it will be important that Caerphilly County Borough is able to harness social, economic and environmental benefits from this partnership. The City Deal should have positive impacts on the retail centres of the Borough and some projects have already been identified by the Council and CCR including the Caerphilly Interchange and a new mixed use development adjacent to the Castle. These projects are potential opportunities to improve the vitality and viability of the town centre. These new projects have the potential to deliver the correct mix of uses suitable for a modern town centre. This is important to ensure that Caerphilly has the right level of footfall throughout the day and evening to ensure a healthy and vibrant place. There is an opportunity through these projects to harness the placemaking aspirations of PPW and to ensure that Caerphilly is a place where businesses want to locate, develop and grow and where people want to live, work, visit and socialise.

Implications of Brexit, Covid-19 and other trends

2.25 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. This growth fuelled demand for new retail floorspace. Since the recession in 2008, expenditure growth has been much slower and the demand for retail floorspace has reduced.

2.26 Experian is a data provider most often used in evidence base studies. Experian provides consumer expenditure data and other economic forecasts. Experian's latest forecasts suggest slower expenditure growth and home shopping/internet spending is expected to grow at a much faster rate than traditional bricks and mortar shopping. Experian's short-term expenditure growth projections (2021, 2022 and 2023) for retail and leisure were published in January 2022 and now reflect Brexit and the Covid-19 pandemic. The main implications of Brexit and the Covid-19 crisis for the evidence base are likely to be as follows:

- impact on the reliability of demographic and economic projections i.e., population growth and Experian expenditure forecasts;
- short term impacts on the mix of uses and customer behaviour that are likely to distort levels of expenditure during 2020 and 2021; and
- longer-term structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.

2.27 The key uncertainties relating to the first two points are primarily the likely recovery period from the Covid-19 crisis. The longer-term structural implications are harder to predict and quantify at this stage, but recent data provides an early indication.

2.28 In the short term, high street operators have faced elevated risks to cash flow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services have been hardest hit during the Covid-19 crisis. Short-term supply chain disruption has led to inflationary pressure, which may have an impact on consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery have benefitted at least in the short term. There is likely to be a longer terms structural shift towards multi-channel shopping (home, TV and internet shopping), reducing the demand for physical space within town centres.

2.29 Bearing these trends in mind, following the Covid-19 crisis there is likely to be a spike in town centre vacancies with unfortunately some businesses failing to re-open, particularly non-food retail operators, restaurants and leisure uses. Many national operators have already announced job losses and store closures e.g. most recently Wilko.

2.30 The Covid-19 crisis and Brexit could have some short-term impact in terms of population migration levels and a pause in construction activity. Given that the focus of this study is to assess the long-term need over the new LDP period with interval projections to 2025, 2030 and 2035, development plan policy should assume population projections will return to projected levels by 2025. The first interval population projections in 2025, and certainly later years, should not be significantly affected by the Covid-19 crisis.

2.31 Office of National Statistics (ONS) monthly sales volume information for Great Britain indicated total retail sales volumes (including on-line sales) during the first Covid-19 lockdown were over 22% lower in April 2020 compared with the pre-Covid position in

February 2020 (seasonally adjusted). However, the period between lockdowns (Summer 2020) sales volumes had recovered to pre-Covid levels. By October 2020 retail sales were 7% higher than the pre-Covid figure in February 2020. However, the reintroduction of Covid-19 restrictions saw a reduction in sales in between November 2020 to January 2021, reaching 5% below pre-Covid levels. After January 2021, sales had recovered to 9% above pre-Covid levels by April 2021. The latest seasonally adjusted figures for November 2021 were 6% above pre-Covid levels.

2.32 The comparison goods (non-food) sector was particularly affected with a 50% drop in sales from February to April 2020, whilst the food sector experienced 10% growth in sales during March 2020 in part due to panic buying at the start of the crisis. Food sales volumes have been consistently higher than the February level during March to November 2020.

2.33 ONS data suggested on-line retail sales (seasonally adjusted) peaked at over 73% higher in May 2020 compared with February 2020. Figures for June 2020 to May 2021 were consistently higher than the pre-Covid sales in February 2020, with a second peak of nearly 81% higher than pre-Covid levels in February 2021.

2.34 During the first Covid lockdown food store on-line sales doubled during May and June 2020 but still represented a relatively small proportion of total sales in this sector, reaching about 11.9% in January 2021, but reducing slightly to 9.7% in November 2021. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April 2020, reaching 45% of sales. By November 2021 on-line sales in this sector were still 23.2% of total sales, compared with the pre-Covid level of 16.1% in February 2020.

2.35 These on-line shopping national trends have been reflected in the County Borough. The household survey results undertaken in April 2022 suggest over 21% of respondents do most of their household's non-food shopping on-line. The household survey results indicate that 5.5% of households did their last main food and grocery shop via the internet/delivery.

2.36 It is difficult to predict the longer-term implications for retail and on-line sales. Nevertheless, ONS's post lockdown data suggests retail sales have recovered to previous levels of growth, but the proportion of retail sales spent on-line is a higher proportion of total sales, which will have an impact of traditional bricks and mortar retailing.

2.37 Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth when compared with historic trends. It is too early to plan for a significant shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but a higher shift to on-line shopping is possible. These longer-term forecasts should be monitored and kept under review.

Long-term expenditure trends

2.38 Planning based on long term expenditure growth projections has always had inherent uncertainties. Despite these uncertainties, development plans must assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth, as now suggested by Experian, should be adopted bearing in mind the uncertainties relating to the growth in on-line shopping.

2.39 For convenience goods, Experian's latest forecasts (January 2022) suggest a 2% reduction in expenditure per capita during 2022 and then limited growth thereafter (0.1% per annum). Experian expects slow expenditure growth and most of this growth will relate to non-store sales. Any need for new convenience goods retail floorspace in the County Borough is likely to relate to population growth or qualitative areas of deficiency.

2.40 For comparison goods expenditure, higher levels of growth are expected in the future (between 2.8% to 2.9% per annum), but still at a lower rate than previous historic trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

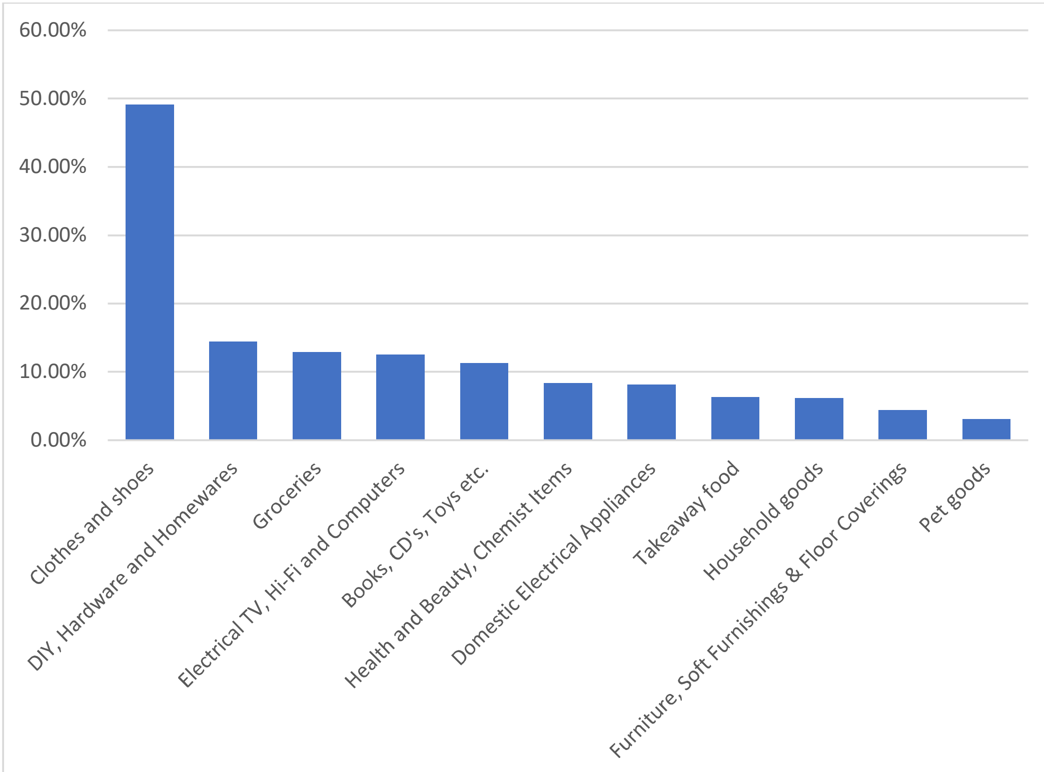
2.41 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued strong growth in multi-channel activity. Experian's Retail Planner Briefing Note 19 (January 2022) states:

"After having eased in 2021, we expect the SFT (special forms of trading) market share to continue to grow strongly in the mid-term, hitting above 30% in 2025. The pace of e-commerce is anticipated to moderate over the longer term, reaching 36.5% of total retail sales by 2040."

2.42 The floorspace capacity assessment in this study update makes an allowance for future growth in e-tailing based on Experian’s latest projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

2.43 The household survey results indicate many households regularly buy items from the internet for home delivery. As indicated above, over 21% of respondents do most of their non-food shopping on-line. The main products regularly purchased online are shown in Figure 2.1. These results indicate that a wide range of goods are purchased via the internet for delivery. However, clothing/shoes are the items most often purchased online with nearly 50% of respondents.

Figure 2.1 Items/services regularly purchased online for delivery (% of respondents)



Source: NEMS household telephone survey results (April 2022)

Mode of travel

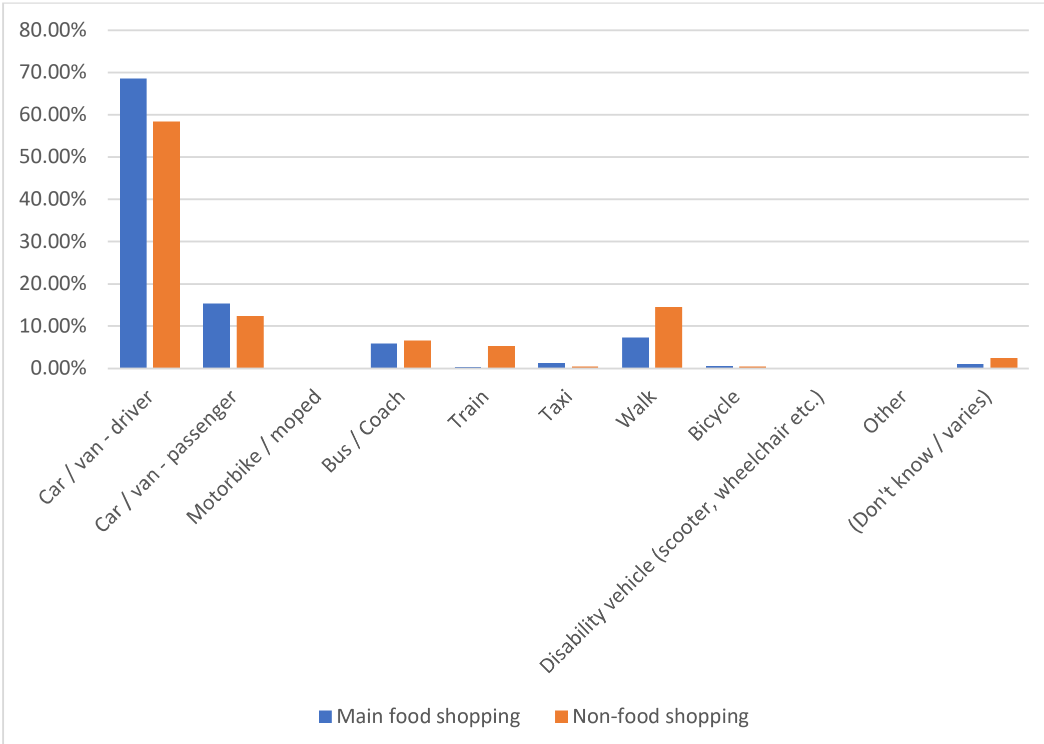
2.44 As indicated above, over 21% of respondents do most of their non-food shopping on-line and 5.5% did their last main food and grocery shop via the internet/delivery. Experian suggests over 25% of retail sales is via non-store activity. These figures suggest many households still travel to undertake food and non-food shopping.

2.45 Despite the increasing proportion of households shopping via the internet, the majority continue to travel to do their main food shop and non-food shopping destinations by car. The results for food and non-food shopping (excluding internet/home shopping) are shown in Figure 2.2.

2.46 Shopping by car (driver or passenger) is the most popular mode of travel for both main food and non-food shopping trips. A relatively small proportion of customers walk to shops for both food and non-food shopping (7.2% and 14.5% respectively).

2.47 For main food shopping car travel (as a driver) was the highest (74%) in the centre of the County Borough (Zone 4) and lowest (62%) in the southeast (Zone 2). Whilst car travel (passenger) was highest (23%) in the north of the County Borough (Zone 6) and lowest (12%) in the northeast (Zone 5). Car travel (driver) for non-food shopping was highest (70.5%) in the centre of the County Borough (Zone 4) and lowest (51.5%) in the southwest (Zone 1). Whilst car travel (passenger) was highest (18.2%) in the north of the County Borough (Zone 6) and lowest (9.6%) in the northeast (Zone 5).

Figure 2.2 Mode of travel for non-food and main food shopping (% of travelling household respondents)



Source: NEMS household telephone survey results (April 2022)

2.48 Car usage (driver or passenger) for both main food and non-food shopping was generally high across the County Borough, with the highest figures being located towards the north and centrally within the County Borough, where levels of accessibility to shopping facilities are generally lower. Across the County Borough many car borne shopping trips are made to Caerphilly Principal Town Centre, which is the largest centre in the County Borough as well trips outside of the County Borough to neighbouring local authorities, such as Cardiff.

2.49 Based on Lichfields' recent experience, car usage is higher within predominantly rural areas, outside of the major cities across the country i.e., normally over 80% of households for main weekly shopping.

2.50 Car usage is generally higher for main food shopping than for non-food shopping because many households undertake bulk food and grocery shopping once a week or less often. Bus and train usage is slightly higher for non-food shopping, which may reflect more non-food shopping trips made to destinations outside the County Borough with good public transport linkages e.g. Cardiff.

2.51 As mentioned above, figures for walking for main food shopping trips (7.2%) and non-food shopping (14.5%) is much lower but is still significant in terms of the total number of trips, particularly in the north of the County Borough, which may reflect how the majority of centres are geared towards the needs of local people.

Demand for town centre floorspace

2.52 Lower expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street in the past decades. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but increased to 14.7% in 2021. There has been a sharp increase in shop vacancies in many town centres due to the impacts of the Covid-19 pandemic, Brexit and the growth in on-line shopping.

2.53 The number of vacant shop units within the County Borough's centres was 124, using Caerphilly County Borough Council's Land Uses Survey (2021) and Lichfields' site visits (2022). The average shop vacancy rate across the centres was 12.8%, lower than the UK average (14.7%).

2.54 The Council's 2021 land use survey suggested comparison goods were the second highest unit type within the centres (205 units), after other non-retail services (283 units), which equates to 21.2% of all shop units, whilst other non-retail services accounts for 29.3% of all shop units. The number of food/beverage uses was 171 outlets, 17.7% of all shop units.

2.55 Property owners, landlords and funds have come under increasing pressure with struggling occupiers seeking to renegotiate terms through company voluntary arrangement (CVA) i.e., an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all its debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/ leisure assets. These trends are likely to be exacerbated by the Covid-19 pandemic, at least in the short-term.

2.56 Whilst the CVA process has created headaches for landlords in terms of rent negotiations, at the same time newly freed-up space has provided new opportunities. Vacated premises have been reconfigured and reused for food/beverage, trampolines, climbing and indoor golf.

2.57 The main centres in the County Borough have a relatively small number of national multiple retailers and may be less affected by this rationalisation of store portfolios.

Food store operators

2.58 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/ Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats).

2.59 The number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. Taking Sainsbury's as an example, data provided by Mintel indicates that the number of Sainsbury's Local stores increased by 76% between 2011 and 2016.

2.60 Several proposed larger food stores have not been implemented across the UK. There has been a move away from larger stores to smaller formats, reflecting changes in customers' shopping habits. The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. This trend is evident in the County Borough with three discount food stores operated by Lidl, Aldi and B&M Bargains located in Caerphilly centre alone.

Comparison retailers

2.61 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers have sought large out-of-centre stores, for example Next and M&S. Matalan also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct expanded out-of-centre. These trends slowed significantly before the Covid pandemic and are unlikely to re-emerge for the foreseeable future.

2.62 The demand for premises within the bulky goods sector, i.e., furniture, carpets, electrical and DIY goods, has been particularly weak in recent years. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. This can lead to the relocation of retailers creating more vacant units in town centres. The retail warehouse sector is reasonably well represented in the County Borough with a concentration of retail warehouses on the Gallagher Retail Park and Blackwood Gate Retail Park. There remains a reasonable selection of bulky goods retail operators at Gallagher Retail Park, but three vacant units were recorded in the Council's land use survey in 2021.

2.63 Within centres, many high street multiple comparison retailers have changed their format. For over two decades, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation into the larger regional and sub-regional centres. Many multiple retailers now require representation in fewer locations to service catchment areas. This trend is evident in most centres in the County Borough with a limited number of comparison goods national multiples present in the smaller centres.

2.64 In general, operator demand for space has decreased since the last recession and, of those national multiples looking for space, many prefer to locate in larger centres i.e. Cardiff, Newport and Bristol. Most centres in the County Borough are at a lower level in the hierarchy and multiple operator demand may be lower in these centres in the future. Much of the occupier demand in many smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping. Polarisation of investment in the larger centres is likely to continue in the future.

2.65 The continuation of these trends will influence future operator requirements in the County Borough with smaller centres becoming less attractive for new comparison goods multiple occupiers, and retailers increasingly looking to relocate into larger units in the main centres. However, smaller vacant units could still be attractive to independent traders and non-retail services, assuming a return to normal levels of growth following the Covid-19 pandemic. Within the main centres some anchor comparison goods stores have closed due to national restructuring e.g., the closure of Bhs, Debenhams and House of Fraser stores, which has created large voids in many town centres. This trend has been most evident in Caerphilly with the closure of a large Argos store within the Castle Court Shopping Centre in recent years.

Charity and discount shops

2.66 The charity shop sector has grown steadily over the past 30 years and there is no sign this trend will end. Planning policies cannot control the amount of charity shops because they fall within the same use class as other shops (Class A1). In many centres, charity shops have occupied vacated shop premises during previous recessions. This trend is evident in the County Borough with a strong presence of charity shops in most of the centres, particularly Blackwood and Caerphilly. Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in secondary retail frontages.

Non-retail services

2.67 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. The non-retail service uses include the following Class A1, A2, A3 and Sui Generis uses:

- hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as takeaways), funeral parlours and post offices;
- banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies;
- restaurants, cafés and hot food takeaways; and
- pubs/bars.

2.68 The proportion of betting shops/casinos/amusement arcades in the County Borough is relatively low, with the highest concentration being within Ystrad Mynach (7.7%) and Newbridge (5.3%). The provision of hot food takeaways is higher than the UK average across all centres within the County Borough, as shown in Section 3 and Appendix 5.

Food/beverage, leisure and entertainment

2.69 Food/beverage, leisure and entertainment are fast moving and creative sectors, with a steady flow of new concepts emerging. Some of these uses have led to a growth in the evening economy in town centres, particularly restaurants, pubs/bars and entertainment activities. Within these sectors there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage, but primarily in larger centres.

2.70 Recently some restaurant chains have experienced difficulties resulting in closures, which suggests operators may have over-stretched. Demand has continued to increase for coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Themed restaurants have also expanded rapidly. This sector in town centres has been the most adversely affected by the Covid-19 crisis and the potential for growth in the short-term is uncertain.

2.71 The key categories for food and beverage offer are:

- *Impulse*: characterised by their produce range that is typically highly visual and hand-held so that it can be eaten "on the go";
- *Speed eating fast food*: food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
- *Refuel and relax*: a drink, snack and a short break in a pleasant environment rather than focusing on eating a main meal; and
- *Casual dining/leisure dining*: incorporating several food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

2.72 The proportion of non-retail uses within town centres across the country has increased significantly. This trend has been experienced in the County Borough, but a short-term reduction seems likely following the Covid-19 crisis. The mix of uses within the County Borough's main centres is explored in more detail in Appendix 5.

Pop-up spaces

2.73 The increase in vacant space has led to an increase in premises available for temporary uses or pop-up uses including pop-up restaurants, pop-up bars, pop-up shops and pop-up galleries. Some landlords have opted for flexible leases, with changing attitudes towards short-term spaces. New independent brands have benefitted despite the lack of brand recognition. E-commerce brands have also sought physical presence, as an essential part of their marketing strategy and an effective way to engage with existing and new customers off-line. Brands have opened pop-up outlets in different locations to test and learn before committing to permanent stores. This trend may increase following the Covid-19 crisis.

Summary

2.74 The trends and changes highlighted in this section, including the growth of home shopping are not new and have been affecting the high street for many years. In response to these trends, town centres have changed and diversified. The food and beverage, leisure and non-retail service sectors have been successful in occupying space no longer attractive to retail tenants. There have been cyclical trends in vacancy rates reflecting the macro-economic trends, but in most cases, town centres recovered during periods of stronger growth. Many believe the most recent decline is structural rather than cyclical and a more flexible approach to town centre uses is required. The move towards vibrant mixed use town centres has been recognised by Welsh Government in the latest version of PPW, Building Better Places and the recent temporary changes to permitted development rights (with the potential for these to become permanent in the future).

2.75 The most recent trends suggest vacancy rates have been slow to recover in weaker centres, and many high street retailers are still experiencing difficulties. The Goad UK shop vacancy rate increased to over 14% during the last recession but has not returned to pre-recession levels (around 8%). The UK vacancy rate is now over 14% and may increase further due to the impact of Brexit and the Covid-19 crisis, and therefore a cautious approach to future growth is required.

2.76 Shopping behaviour will continue to change, and the high street must respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience for those looking for a "day out" or "evening out".

3.0 Hierarchy of Centres and Local Context

3.1 PPW states that local planning authorities should develop through their development plans a clear strategy and policies for retail development which seek to achieve vibrant, attractive and viable retail and commercial centres. They should set out a framework for the future of retail and commercial centres in their area which promotes a successful retailing sector supporting existing communities. This section provides an overview of the shopping hierarchy in Caerphilly County Borough and the surrounding areas.

Caerphilly County Borough and the Surrounding Area

3.2 Caerphilly County Borough is adjoined by several other Local Authority Areas:

- Blaenau Gwent to the North-East;
- Torfaen County to the East;
- Newport City to the South-East;
- Cardiff to the South;
- Rhondda Cynon Taf to the South-West and West;
- Merthyr Tydfil County Borough Council to the North-West and North; and,
- Powys County Council to the North.

3.3 The County Borough of Caerphilly forms part of the South East Wales City Region and its close proximity to Cardiff (the primary settlement and the economic engine of the city region) provides opportunities and constraints with regards to the retail centres of the Borough. Caerphilly and Cardiff are well connected by rail and road (and the South Wales Metro will improve this further) and this provides opportunities for the people of Caerphilly to work and shop in Cardiff and vice versa.

3.4 The current development plan sets out the retail hierarchy of the County Borough within Policy SP4 (Settlement Strategy), which designates Caerphilly, Blackwood, Bargoed, Ystrad Mynach and Risca/Pontymister as Principal Town Centres supported by the four Local Centres of Rhymney, Nelson, Newbridge and Bedwas.

3.5 Policies CM1.1, CM1.2, CM1.3, CM1.4 and CM1.5 identify definitive boundaries for the five Principal Town Centres. Policy CM1.2 and CM1.3 supporting paragraph 3.124 states that Blackwood and Caerphilly are the largest centres in the County Borough, in terms of retail floorspace, service provision and commercial leisure facilities. Policy CM1.1 supporting paragraph 3.28 identifies Bargoed as the third largest centre, where retailing is a vital component. Risca/Pontymister Principal Town Centre is smaller than Blackwood, Caerphilly and Bargoed, but Policies CM1.4 and CM1.5 supporting paragraph 3.211 states that it is an important retail centre and has potential for significant new retail provision.

3.6 Policies CM1.2 and CM1.3 supporting paragraph 3.125 states that although Ystrad Mynach Principal Town Centre contains both a Tesco Superstore and a Lidl it has more important office and health roles. Generally, the Local Centres are smaller again in size and service the needs of the local communities albeit Newbridge is comparable in size to Ystrad Mynach.

All Principal Town Centres and Local Centres are shown in Appendix 1 (Study Area / Centre Network) below.

3.7 The Javelin Group's Venuescore ranks over 3,500 retail destinations in the UK including town centres, malls, retail warehouse parks and factory outlet centres across the country. Each destination is given a weighted score based on the number of multiple retailers present, including anchor stores, fashion operators and non-fashion multiples. The score attached to each retailer is weighted depending on their overall impact on shopping patterns, for example a department store will achieve a high score.

3.8 Within the South East Wales City Region, Cardiff is the major regional city centre at the top of the Venuescore ranking. Newport and Cwmbran are next in the ranking, and have a significantly larger Venuescores than the rest of the centres within the South East Wales City Region. Figures are included within Table 7.10 in Appendix 6.

3.9 As shown in Table 3.1 below, Caerphilly Principal Town Centre achieves the highest Venuescore (at the top of the local hierarchy), Blackwood Principal Town Centre has the second highest Venuescore and Bargoed Principal Town Centre has the third highest Venuescore in the County Borough. Table 3.1 includes all other centres within the Caerphilly County Borough that have been ranked by Javelin (2016 – 2017). The four Local Centres designated within the Development Plan have not been included within Javelin's analysis, because they are small centres with few multiple retailers.

Table 3.1 Venuescore Ranking of Centres 2017

Centre	Location Grade	Venuescore (2016)	Rank (2016)	Market Position Classification
Cardiff	Major City	516	6th	Upper Middle
Newport	Regional	176	107th	Middle
Cwmbran	Regional	143	160th	Lower Middle
Caerphilly, Centre	Major District	59	500th	Lower Middle
Blackwood, Centre	District	37	847th	n/a
Blackwood, High St	Minor District	22	1,418th	n/a
Bargoed, Centre	Minor District	21	1,481st	n/a
Hengoed, Ystrad Mynach	Local	17	1,775th	Lower Middle
Newport (Gwent), Risca	Local	17	1,775th	n/a
Caerphilly, Gallagher Retail Park	Local	16	1,888th	Middle
Caerphilly, Energlyn	Local	11	2,815th	n/a
Blackwood, Pontllanfraith	Local	10	3,133rd	Lower Middle
Caerphilly, Castle View/ Nantgarw Rd	Local	10	3,133rd	Middle
Caerphilly, Gallagher Crossways Retail Park	Local	10	3,133rd	Middle

Source: Javelin's Venuescore 2017

3.10 Venuescore data closely correlates to the actual market size of the shopping destination in terms of consumer expenditure. Javelin also assesses the market position of centres based on the retailers present and the centre's relative position along a spectrum running from discount to luxury or down-market to aspirational (i.e. lower, middle to upscale), as shown in Table 3.1 and Table 7.10 in Appendix 6.

3.11 This Javelin information is used in retail hierarchy terms to assess the relative strength of shopping destinations. The market position measures the degree each venue's offer as a high-end or discount focus (High=Bias towards High-end retailers; Low=Bias towards Discount-oriented retailers). Javelin also provides other measures of the strength of centres as outlined below.

3.12 The main centre in the South East Wales City Region is Cardiff, which is categorised as having an "Upper Middle" market position (as shown in Table 7.11 in Appendix 6), which suggests it caters for a wide customer base. Bridgend Designer Outlet, Cardiff Bay Centre, Cowbridge Centre, Ferry Road Centre (Cardiff), Ty Glas Retail Park, Palmerstown Centre (Barry) and Orb Drive Centre (Newport) all have an "Upper Middle" market position too. Caerphilly Principal Town Centre on the other hand is categorised as having a "Lower Middle" market position, which suggests it caters predominantly for value for money/discount sectors.

3.13 In qualitative terms, Gallagher Retail Park, Gallagher Crossways Retail Park and Castle View/Nantgarw Road Centre have the highest market position "Middle" within the County Borough, despite their relatively low Venuescores. This indicates that these locations have a good provision of high-quality shops despite having a smaller number of retail stores.

Designated Centres

3.14 Designated centres in the County Borough are summarised in Table 3.2 below, based on the Council's land use survey in 2021 and Lichfields' survey of Local Centres in 2022. Table 3.2 excludes leisure and community uses.

Table 3.2 Caerphilly County Borough Council - Number of Outlets by Use (2021/2022)

Centre	Total retail service units	Comparison goods retail	Convenience goods retail	Financial/ Professional Services	Food/ Beverage	Non-retail services	Vacant units
Principal Town Centres							
Caerphilly	233	58	14	33	40	65	23
Blackwood	212	60	10	31	33	50	28
Bargoed	147	25	8	12	22	44	36
Risca/ Pontymister	105	19	10	12	22	29	13
Ystrad Mynach	89	18	11	12	14	31	3
Local Centres							
Bedwas	28	3	3	0	8	11	3
Rhymney	30	3	5	1	5	9	7
Nelson	46	5	4	3	12	20	2
Newbridge	76	14	5	9	15	24	9
Total	**966**	**205**	**70**	**113**	**171**	**283**	**124**

Source: Caerphilly County Borough Council's Land Use Survey 2021 and Lichfields Survey of Local Centres (April 2022)

3.15 This information confirms Caerphilly is the largest centre in terms of the total number of retail/service units and the number of convenience goods retail outlets. The four remaining Principal Town Centres are smaller and vary significantly in terms of the total number of shop units i.e. between 89 to 212 units. All Principal Town Centres have a relatively good mix of retail and service facilities. The Local Centres are smaller again and have a more limited range and choice of comparison and convenience goods shopping. They also vary significantly in size ranging from 28 to 76 units. Newbridge is the largest local centre (76 units) and is comparable to Ystrad Mynach Principal Centre in terms of number of units.

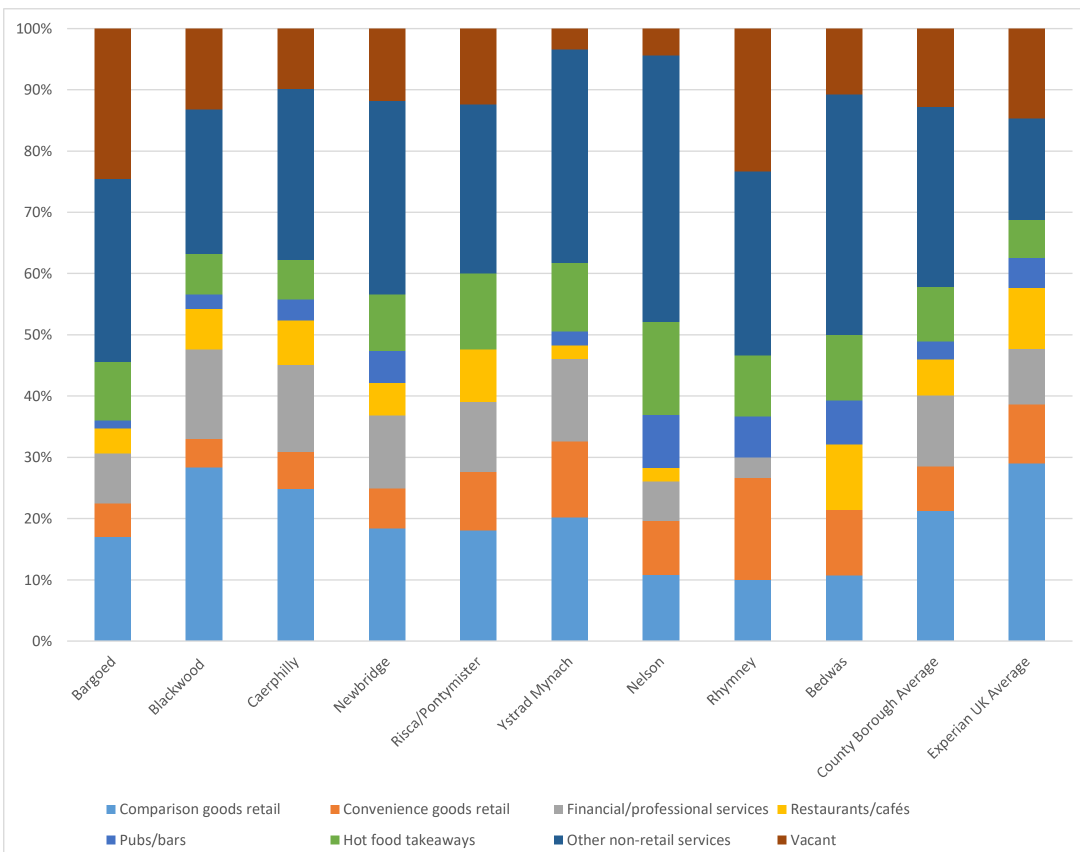
Diversity of main town centre uses

3.16 Figure 3.1 below shows the composition of the main centres in terms of the mix and proportion of different uses i.e. the proportion of shop units within each use class. This is compared with the County Borough and UK average mix for all centres across the UK. More detail is provided in the health check analysis in Appendix 5.

3.17 The centres have a good mix of retail and service uses, but all centres except Caerphilly and Blackwood have a lower proportion of comparison goods retail units than the County Borough averages, and all centres have a lower proportion of comparison goods retail units compared to the national averages. All centres in the Borough have a reasonable proportion of convenience goods retail and a high proportion of non-retail services, but a low proportion of pubs/bars.

3.18 Vacancy rates are generally lower than the UK average (14.7%) and the County Borough average (12.8%). Bargoed Principal Town Centre has the highest vacancy rate (24.5%), which is significantly higher than the national average.

Figure 3.1 Mix of retail and service uses



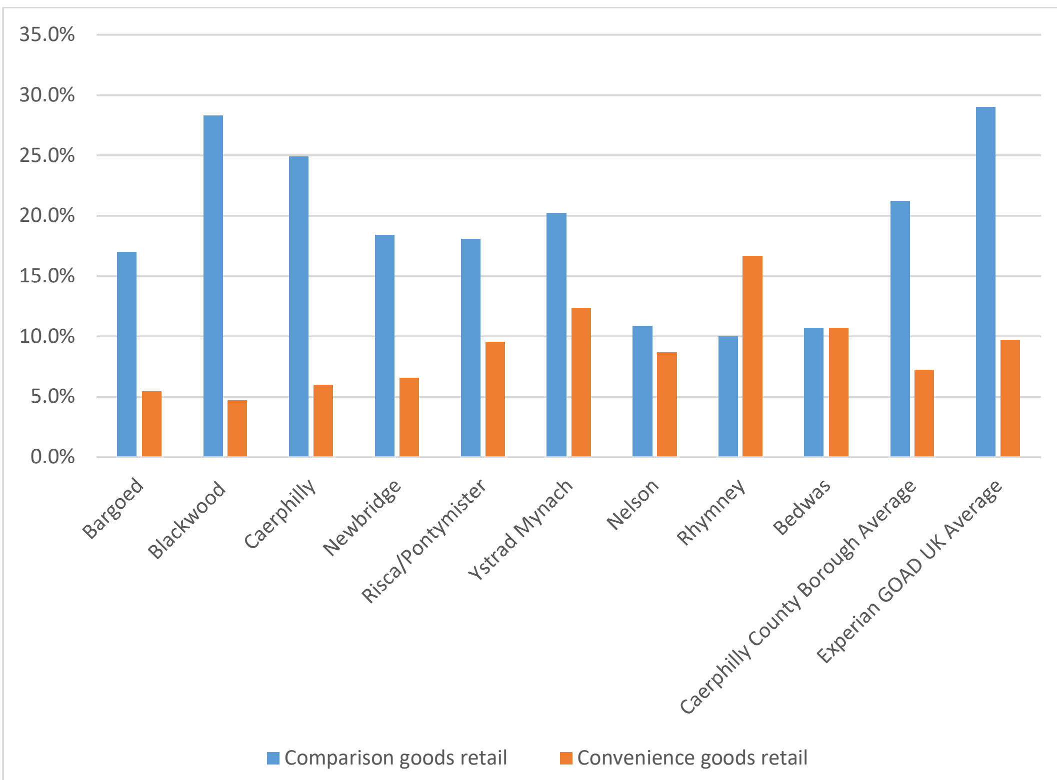
Source: Caerphilly County Borough Council Land Uses Survey (2021), Experian GOAD Plans UK Averages (2021) and Lichfields survey of Local Centres (2022)

Retailer representation

3.19 Figure 3.2 compares the proportion of convenience and comparison retail units within the nine designated centres compared with the Caerphilly County Borough Council Average and the UK national average. All centres, apart from Ystrad Mynach, Rhymney and Bedwas, have a lower proportion of convenience goods units when compared with the national average. Convenience goods representation is particularly strong in Rhymney Local Centre (16.7%). Also, all centres have a lower proportion of comparison goods units when compared with the national average. Caerphilly and Blackwood Principal Town Centres have a high proportion of comparison goods retail uses when compared with the Caerphilly County Borough average.

3.20 Generally larger centres have a higher proportion of comparison shop units than smaller centres. Larger centres tend to have a stronger focus on fashion shopping and therefore have a higher proportion of comparison shops. Smaller centres tend to have a higher proportion of convenience goods units and non-retail services, catering for the day to day needs of their local catchment area. This is reflected in Caerphilly County Council's Principal Town Centres as well as Local Centres. Convenience goods retail and non-retail services perform an important role within the centres for relatively localised needs.

Figure 3.2 Proportion of comparison and convenience retail (% total units)



Source: Caerphilly County Borough Council Land Uses Survey (2021), Experian GOAD Plans UK Averages (2021) and Lichfields Survey of Local Centres (2022)

Service Uses

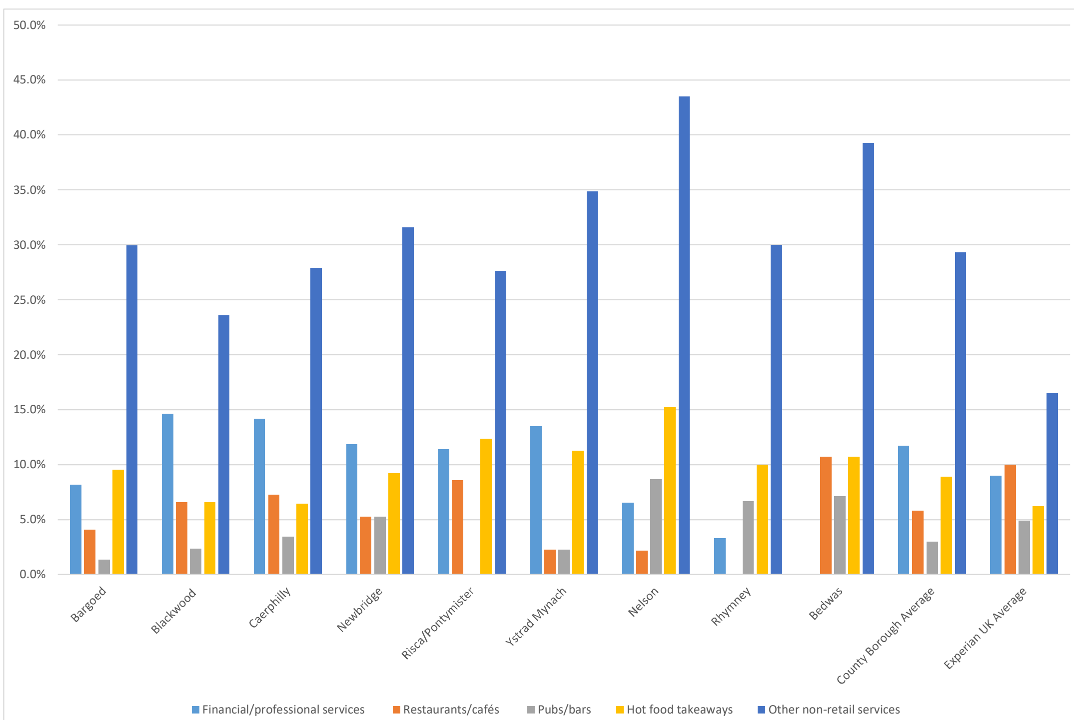
3.21 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. Figure 3.3 below summarises the number and proportion of units in different service category uses compared with the Caerphilly County Borough Council Average and UK average. The service uses are categorised as follows:

- Financial and professional services including banks, building societies, financial services, estate agents and employment agencies.
- Food/beverage uses including restaurants, cafés, pubs, bars and hot food takeaways.
- Other non-retail services including a wide range of uses, such as hairdressers, dry-cleaners, travel agents, beauty salons and post offices.

3.22 The proportion (Figure 3.3) of financial/professional is higher than the national average, within Caerphilly, Blackwood, Ystrad Mynach and Risca/Pontymister Principal Town Centres as well as Newbridge Local Centre. Whilst the provision is lower in Bargoed Principal Town Centre as well as Nelson, Rhymney and Bedwas Local Centres.

3.23 All centres, apart from Caerphilly and Blackwood Principal Town Centres, have a relatively high proportion of other non-retail services. All centres have a higher proportion of other non-retail services than the national average (9%). The provision of cafés/restaurants is generally lower than the national average (10%), apart from in Bedwas Local Centre where it is higher than the national average (11%). The hot food takeaway provision is higher than the national average across all centres within the County Borough.

Figure 3.3 Total number of non-retail service uses



Source: Caerphilly County Borough Council Land Uses Survey (2021), Experian GOAD Plans UK Averages (2021) and Lichfields Survey of Local Centres (2022)

3.24 The centres have a varied provision of food/beverage outlets serving either the daytime or evening economies. Nelson, Bedwas and Rhymney Local Centres appear to have the strongest provision of pubs/bars whilst Caerphilly Principal Town Centre has the strongest provision of restaurants; both of which support the night-time economy. Risca/Pontymister, Bargoed and Ystrad Mynach Principal Town Centres have the weakest provision of pubs/bar and Newbridge, Nelson, Rhymney and Bedwas Local Centres have the weakest provision of restaurants serving the evening economy. The proportion of hot food takeaways is higher than the UK average across the County Borough. The highest proportion of hot food takeaways is located within Nelson (15%) and the lowest is located within Caerphilly (6.4%).

Summary

3.25 The analysis of the hierarchy of centres in this section indicates the Borough has a well-established network of centres that currently serve their respective areas. Caerphilly and Blackwood Principal Town Centres are similar in size and are the only centres with the potential to cater for a borough-wide catchment area. The health of the designated centres is assessed in more detail in Appendix 5.

3.26 The average shop vacancy rate in the County Borough is 12.8%, which is lower than the UK average (14.7%). Bargoed Principal Town Centre has the highest vacancy rate (24.5%), which is significantly higher than the national average. Ystrad Mynach on the other hand has the lowest vacancy rate (3.4%), which is significantly lower than the national average.

3.27 Continuing to identify the hierarchy of centres in future development plans is important in terms of:

- ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
- directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
- identifying a viable role and strategy for each centre.

3.28 The network of town and local centres should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.

3.29 Further discussion on potential changes to the retail hierarchy is provided in section 6 (implications for planning policy).

4.0 Retail and food/beverage need assessment

Introduction

4.1 This section updates the quantitative and qualitative need for retail uses within the County Borough. PPW indicates the need for retail development should be identified through the development plan process. Local authorities should consider the most appropriate form, scale and location of provision to best meet these requirements.

4.2 This section sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping and food/beverage (eating and drinking away from the home).

Assumptions and base data

4.3 All monetary values expressed in this study are at 2020 prices, consistent with Experian's base year expenditure figures for 2020 which is the most up to date information available.

Study area zones and population

4.4 A household telephone survey was undertaken to quantify existing shopping and leisure patterns in April 2022. The study area includes the administrative area of Caerphilly County Borough and parts of neighbouring authorities. The study area is sub-divided into six zones as shown in Appendix 1, based on ward boundaries, reflecting the primary catchment areas of the main destinations within the County Borough.

4.5 The baseline projected population within each zone between 2022 to 2035 is set out in Table 1A in Appendix 2, based on Experian projections. The base year 2022 population within the Study Area (zones 1 to 6) is 213,427. This population is projected to increase to 215,350 by 2035, an increase of 0.9%.

4.6 As an alternative high growth scenario, the Council’s preferred population and housing growth option has been adopted, as shown in Table 1B in Appendix 2. This high growth scenario suggests population in the study area will increase to 222,923 in 2035.

Retail Expenditure

4.7 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2020 have been obtained.

4.8 Experian's latest local expenditure figures for the study area in 2020. Experian's short term EBS growth forecast rates during 2021, 2022 and 2023 reflect current economic circumstances, including the Covid-19 crisis. The forecast changes during this three year period are as follows:

- convenience goods: -5.5%;
- comparison goods: +7.0%;
- leisure: +52.8%.

4.9 Experian’s short term forecasts, particularly for comparison goods and leisure, assume a post-Covid lockdowns recovery during 2021 and 2022. Experian's medium and long term growth average forecasts have been adopted, as follows:

- convenience goods: +0.1% per annum growth for during 2024 and beyond;
- comparison goods: +2.8% per annum growth for 2024 to 2028 and +2.9% per annum after 2028; and
- leisure: +1.1% per annum growth for 2024 to 2028 and +0.9% per annum after 2028.

4.10 These growth figures relate to real growth and exclude inflation.

4.11 Experian's latest adjusted deductions for SFT (i.e., home and online shopping through non-retail businesses) in 2020 were:

- 5.4% of convenience goods expenditure; and
- 25.6% of comparison goods expenditure.

4.12 Experian's projections suggest that these SFT percentages will increase to 7% and 28% by 2029 respectively. The long term Experian projections suggest an increase to 7.7% and 30.1% by 2039 respectively.

4.13 Table 2 in Appendix 2 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2039, excluding SFT. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 3 and food/beverage expenditure is shown in Table 2 in Appendix 4.

4.14 The baseline total convenience goods spending within the study area is forecast to increase marginally by +0.4% from £458.19 million in 2022 to £459.92 million in 2035, as shown in Table 3 in Appendix 2.

4.15 Baseline comparison goods spending is forecast to increase by +34.8% between 2022 and 2035, increasing from £574.77 million in 2022 to £774.75 million in 2035, as shown in Table 3 in Appendix 3.

4.16 Baseline food and beverage spending is forecast to increase by +14.7% between 2022 and 2035, increasing from £239.6 million in 2022 to £274.74 million in 2035, as shown in Table 3 in Appendix 4.

Growth in turnover densities

4.17 Experian's Retail Planner Briefing Note 19, January 2022 indicates comparison goods retail sales floorspace is expected to increase its average sales density by +2.3% during 2023 and a slightly lower growth is envisaged in the medium term (+2.2% per annum up to 2028) and longer term (+2.6% per annum beyond 2028). These increases have been adopted and will absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the expected high increase in on-line/home shopping through retail businesses i.e., the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide.

4.18 For convenience goods retail, Experian indicates an increase of +1.6% in 2023, but lower growth is envisaged in the medium term (+0.1% per annum up to 2028) and no predicted growth in sales densities thereafter.

4.19 Experian does not provide projections for food and beverage sales densities. Future growth is assumed in line with expenditure growth. Future growth reflects the necessary period of recovery required in this sector following the Covid-19 pandemic. An average growth rate of 0.5% per annum has been adopted.

Base year market shares

4.20 The turnover of facilities within the County Borough is estimated based on the market shares or penetration rates. To assess the capacity for new floorspace, penetration rates were estimated for shopping and food/beverage facilities based on the household shopper survey undertaken in April 2022. The market shares for convenience goods and comparison goods shopping are shown in Table 4 in Appendix 2 and Table 4 in Appendix 3 respectively. The market shares for food and beverage expenditure are shown in Table 4 in Appendix 4.

4.21 The household survey results suggest a high level (over 83%) of expenditure retention within the Study Area for convenience goods shopping. The retention of comparison goods expenditure is much lower (under 53% in the Study Area) due to the draw of larger centres outside the County Borough, primarily in Cardiff, Merthyr Tydfil and Newport. The retention of food/beverage expenditure is similar to comparison goods shopping at just under 54% with high expenditure outflow to Cardiff, Merthyr Tydfil and Newport.

4.22 The results of the household shopper survey relating to main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The market shares in Table 4 in Appendix 3 are a combined rate for both main and top up shopping based on a 70:30 split. This 70:30 split is based on Lichfields' experience and is widely accepted in retail studies of this kind. The survey results suggest reasonably high levels (over 83%) of convenience goods expenditure retention within the Study Area, as shown in Table 4.1. These figures indicate that most residents tend to undertake their food and grocery shopping close to where they live albeit predominantly by car for main food shopping trips.

Table 4.1 Food and grocery trip retention in the Study Area Zones (% of all trips in zones)

Zone	Main (1st)	Main (other)	Top-up	**Combined market share**
Zone 1 – Caerphilly southwest	91.3	90.5	92.2	**91.3**
Zone 2 – Risca/Pontymister/Bedwas	92.2	76.4	85.9	**87.3**
Zone 3 – Nelson	72.1	76.1	62.7	**70.1**
Zone 4 – Ystrad Mynach	93.5	91.3	92.1	**92.6**
Zone 5 – Bargoed/Blackwood	91.0	92.2	93.6	**91.9**
Zone 6 - Rhymney	31.9	30.6	46.4	**36.1**

Source: NEMS household survey results April 2022

4.23 The main food and grocery destinations in the County Borough were as follows (combined % market share of all expenditure within all study area zones):

1 Asda, Blackwood Retail Park, Blackwood 8.4%;

2 Asda, Pontygwindy Road, Caerphilly 8.0%;

3 Morrisons, Castle Court, Caerphilly 6.1%;

4 Tesco, New Road, Ystrad Mynach 5.9%;

5 Morrisons, Bargoed Gateway, Bargoed 5.3%;

6	Aldi, Blackwood Gate RP, Blackwood	4.7%
7	Tesco Extra, Pontymister	4.5%;
8	Sainsbury's, Pontllanfraith, Blackwood	4.4%;
9	Lidl, Beddau Way, Caerphilly	3.8%;
10	Lidl, Pengam Road, Ystrad Mynach	3.1%; and
11	Aldi, Gallagher Retail Park, Caerphilly	3.1%.

4.24 The market shares for comparison goods shopping in Table 4, Appendix 3 are based on a weighted average for each comparison goods category included within the household survey e.g. clothing/footwear, electrical, furniture, floorcoverings, DIY and health and beauty products. The survey results suggest lower, but still reasonable levels of comparison goods expenditure retention for all goods categories within most study area zones, as shown in Table 4.2.

Table 4.2 Non-food comparison trip retention (% of all trips in Study Area Zones – excluding internet shopping)

Goods category	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
Clothing and footwear	32.3	29.0	21.0	34.5	38.9	13.8
Domestic electric appliances	69.0	38.5	35.6	74.3	54.3	17.4
Other electrical goods	63.7	36.9	30.4	62.0	52.4	3.9
Furniture, floor-coverings, household textiles	45.5	28.9	42.3	52.2	60.3	21.0
DIY / hardware and garden items	84.6	50.4	50.4	87.0	74.0	26.4
Health and beauty items	80.6	66.9	58.3	84.2	88.2	31.1
Books and stationery	81.6	60.7	64.1	79.5	74.2	36.6
Games, toys, sports, hobby items, pet products	78.9	59.9	40.2	76.9	52.7	21.3
Other non-food e.g. jewellery, glassware, household	47.8	58.6	47.0	58.1	40.4	10.6
Combined market share	**61.3**	**47.0**	**40.1**	**63.8**	**50.7**	**19.1**

Source: NEMS household survey results April 2022

4.25 The lowest levels of comparison goods expenditure retention (highest leakage or outflow) is from Zone 6 in the north of the Country Borough, where leakage to Merthyr Tydfil is high. Leakage to Cardiff is relatively high across all zones (10% to 30%), with the highest proportional leakage from the southern area of the County Borough.

4.26 The results suggest good levels of expenditure retention for lower order comparison goods, such as DIY/hardware, health/beauty and books/stationery, but lower levels of retention for higher order goods, such as clothes and furniture.

4.27 The results of the household shopper survey relating to eating and drinking away from the home have been used to estimate existing food and beverage expenditure patterns. The market shares in Table 4 in Appendix 4 are a combined rate for both eating out and drinking at pubs/bars are based on a 75:25 split. This 75:25 split is based on Lichfields' experience across the country. The survey results suggest reasonable levels of food/beverage expenditure retention across the County Borough, except for the Zone 6 in the north, as shown in Table 4.3. The retention of beverage expenditure is much higher than eating out. There is a high level of expenditure leakage to Cardiff for eating out.

Table 4.3 Food and beverage trip retention (% of all trips in zones)

Zone	Eating out	Drinking away from home	**Combined market share**
Zone 1 – Caerphilly southwest	49.4	70.7	**54.7**
Zone 2 – Risca/Pontymister/Bedwas	43.5	80.5	**52.8**
Zone 3 – Nelson	54.7	39.0	**50.8**
Zone 4 – Ystrad Mynach	58.4	74.7	**62.5**
Zone 5 – Bargoed/Blackwood	51.0	79.3	**58.1**
Zone 6 - Rhymney	15.4	57.2	**25.9**

Source: NEMS household survey results April 2022

Capacity for convenience goods retail floorspace

4.28 Based on the market shares calculated from the household survey results, available convenience goods expenditure attracted to the County Borough in 2022 is shown in Table 4 in Appendix 2. This has been projected forward to 2025, 2030 and 2035, and is summarised in Table 10A (baseline) and Table 10B (high growth) in Appendix 2. The baseline scenario suggests convenience goods expenditure available to facilities within the County Borough is expected to increase from £440.45 million in 2022 to £442.09 million in 2035. This increase is due to population growth, which offsets the slight reduction in average expenditure per person (excluding SFT). A breakdown for the six zones is set out in Table 4.4.

Table 4.4 Convenience goods base year turnover in 2022

Zone	**Turnover £M**
Zone 1 – Caerphilly southwest	155.05
Zone 2 – Risca/Pontymister/Bedwas	76.04
Zone 3 – Nelson	7.40
Zone 4 – Ystrad Mynach	60.49
Zone 5 – Bargoed/Blackwood	137.95
Zone 6 - Rhymney	3.51
Total	**440.45**

Source: Table 10A in Appendix 2.

4.29 The benchmark turnover of food stores and convenience shops within the principle town centres and local centres in the County Borough is calculated in Table 9 in Appendix 2. The benchmark turnover is based on the sales area within each store and the respective company average sales densities. This turnover is not necessarily the actual turnover of the store, but it provides a useful benchmark to assess how well existing facilities are trading.

4.30 The combined benchmark turnover of identified food stores and other convenience goods shops within the main settlements is estimated to be £429.39 million, compared with the estimated actual turnover of £424.74 million, as estimated form the household survey results. These estimates suggest convenience goods sales floorspace in the County Borough is trading just over 1% below the national average. Convenience goods shopping facilities within the Country Borough appear to be trading satisfactorily.

4.31 Tables 10A and 10B in Appendix 2 subtract the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus/deficit expenditure that may be available for new development in the future. The baseline figures indicate there is a projected convenience goods expenditure deficit of -£13.89 million at 2025, because population and expenditure growth will be offset by an increase in home shopping (SFT) and increases in sales densities.

4.32 This baseline expenditure deficit is projected to increase to -£14.8 million at 2030. Continued population growth reduces the deficit to -£12.39 million at 2035. These projections suggest there in overall terms there is no capacity for additional convenience goods floorspace for the foreseeable future. However, there are locational variations across the County Borough. The deficit and surplus expenditure projections for each study area zone are converted into floorspace estimates in Table 11A and Table 11B in Appendix 2, based on an average sales density of £12,000 per sq.m net, which is an approximate average for the main food store operators. The baseline and high growth results are summarised in Table 4.5 and 4.6.

Table 4.5 Baseline convenience goods floorspace capacity (sq.m gross) - cumulative

Zone	2025	2030	2035
Zone 1 – Caerphilly southwest	575	580	716
Zone 2 – Risca/Pontymister/Bedwas	-244	-277	-249
Zone 3 – Nelson	-271	-270	-264
Zone 4 – Ystrad Mynach	-592	-605	-567
Zone 5 – Bargoed/Blackwood	-1,056	-1,115	-1,042
Zone 6 - Rhymney	-36	-39	-38
Total	**-1,624**	**-1,725**	**-1,444**

Source: Table 11A in Appendix 2.

4.33 The deficit expenditure projections suggest an over-supply of convenience goods floorspace in the County Borough of 1,725 sq.m gross in 2030 but decreasing to 1,444 sq.m gross by 2035. However, there is a positive capacity projection in Zone 1 – Caerphilly southwest due to higher population growth in this area and above average trading levels in the base year.

Table 4.6 High growth convenience goods floorspace capacity (sq.m gross) - cumulative

Zone	2025	2030	2035
Zone 1 – Caerphilly southwest	796	1,170	1,659
Zone 2 – Risca/Pontymister/Bedwas	-223	-219	-160
Zone 3 – Nelson	-260	-237	-209
Zone 4 – Ystrad Mynach	-538	-427	-270
Zone 5 – Bargoed/Blackwood	-981	-854	-621
Zone 6 - Rhymney	-36	-37	-36
Total	**-1,242**	**-606**	**362**

Source: Table 11B in Appendix 2x

4.34 The high growth projections suggests a small over-supply in 2030 (606 sq.m gross) and a small surplus capacity for 362 sq.m gross in 2035, as shown in Table 11B in Appendix 2.

4.35 Collectively, principal town centres and local centres within the County Borough have 70 convenience goods outlets including food stores operated by multiple retailers and smaller independent shops. Residents across the County Borough have good access to a range and choice of food stores. The most obvious areas of deficiency in food store provision is the rural area in the north of the Borough (Zone 6). Rhymney only has a small Premier convenience store. However, residents in this area have access to large food stores in Merthyr Tydfil, Tredegar and Ebbw Vale. Furthermore, the population in Zone 6 is dispersed over a wide area. The settlements in Zone 6 are probably too small to sustain a large food store.

4.36 Main shopping trips are generally made once a week or less often. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large superstores, defined as over 2,500 sq.m net or more, are the usual destination for these types of bulk food shopping trip. There are 7 food superstores (over 2,500 sq.m net) in the County Borough i.e. Asda stores in Caerphilly and Blackwood; Morrison's stores in Bargoed and Caerphilly; Tesco stores in Hengoed and Pontymister and Sainsbury's in Blackwood. Most residents in the County Borough have good or reasonable levels of access to at least one food superstore.

4.37 In addition to these superstores, there is good choice of other large stores/supermarkets and smaller convenience stores. There are 7 large food stores (1,000 to 2,000 sq.m net). The discount food sector is well represented by Lidl and Aldi stores in Blackwood, Caerphilly, Hengoed and Risca/Pontymister. There is a good selection of smaller convenience stores including 5 Co-op stores, 4 Tesco Express stores and 3 Iceland stores.

Capacity for comparison goods floorspace

4.38 Available comparison goods expenditure has been projected to 2025, 2030 and 2035 and is summarised in Table 9A and Table 9B in Appendix 3. Baseline comparison goods expenditure available to facilities is expected to increase from £331.29 million in 2022 to £446.9 million by 2035. A breakdown for the six zones is set out in Table 4.7.

Table 4.7 Comparison goods base year turnover in 2022

Zone	Turnover £M
Zone 1 – Caerphilly southwest	176.64
Zone 2 – Risca/Pontymister/Bedwas	16.94
Zone 3 – Nelson	1.70
Zone 4 – Ystrad Mynach	27.97
Zone 5 – Bargoed/Blackwood	106.45
Zone 6 - Rhymney	1.59
Total	**331.29**

Source: Table 9A in Appendix 3.

4.39 Tables 10A and 10B in Appendix 3 subtract the projected turnover of existing floorspace including an allowance for growth in turnover densities. The projections suggest future growth in available expenditure will be offset by expected growth in turnover densities up to 2035 i.e. existing retail businesses will absorb expenditure growth.

4.40 This assumption is consistent with Experian's projected growth in non-store sales taken by retail businesses. The growth in retail operator's turnover densities will in part be fuelled by on-line sales and click and collect, which will not directly affect the need for additional retail sales floorspace. The deductions already made for SFT only relate to non-store sales through non-retail businesses.

4.41 The baseline figures suggest by 2025 there is a projected expenditure deficit of -£3.38 million, which will increase to -£5.38 million by 2030, but longer term expenditure growth will reduce this deficit marginally to -£5.35 million in 2035. These projections suggest growth in turnover densities will absorb expenditure growth and there is likely to be an over-supply of comparison goods retail floorspace up to 2035. The deficit expenditure projections have been converted into floorspace estimates in Table 10A and Table 10B in Appendix 3. The baseline and high growth results are summarised in Tables 4.8 and 4.9.

Table 4.8 Baseline comparison goods floorspace capacity (sq.m gross) - cumulative

Zone	2025	2030	2035
Zone 1 – Caerphilly southwest	-444	-572	-443
Zone 2 – Risca/Pontymister/Bedwas	-55	-82	-86
Zone 3 – Nelson	-3	-3	-2
Zone 4 – Ystrad Mynach	-64	-99	-90
Zone 5 – Bargoed/Blackwood	-273	-430	-414
Zone 6 - Rhymney	-5	-8	-9
Total	**-843**	**-1,196**	**-1,045**

Source: Table 10A, Appendix 3.

4.42 These baseline projections suggest there is no capacity for additional comparison goods retail floorspace in the County Borough for the foreseeable future. The implied over-supply of floorspace is 1,196 sq.m gross in 2030, which will reduce marginally to 1,045 sq.m gross by 2035.

Table 4.9 High growth comparison goods floorspace capacity (sq.m gross) - cumulative

Zone	2025	2030	2035
Zone 1 – Caerphilly southwest	64	830	1,805
Zone 2 – Risca/Pontymister/Bedwas	-44	-54	-43
Zone 3 – Nelson	3	14	28
Zone 4 – Ystrad Mynach	-13	71	189
Zone 5 – Bargoed/Blackwood	-131	55	372
Zone 6 - Rhymney	-5	-7	-7
Total	**-125**	**909**	**2,343**

Source: Table 10B, Appendix 3.

4.43 The high growth projections suggest no short term capacity in 2025 and a small requirement for 909 sq. m gross in 2030, increasing to 2,343 sq.m gross by 2035.

4.44 Collectively main and local centres within the County Borough have 205 comparison goods outlets including some national retailers, but mostly small independent shops. There are 13 comparison outlets within Gallagher Retail Park and Blackwood Gate Retail Park. Over half of the comparison goods shops are concentrated in Caerphilly and Blackwood. The remaining provision is relatively dispersed and most shopping destinations within the County Borough provide a limited range and choice of comparison shops. However, the County Borough is also served by Cardiff, Newport, Merthyr Tydfil and Pontypridd. These larger centres will limit the potential for the County Borough to increase its market share of comparison goods expenditure and reduce expenditure leakage.

Capacity for food/beverage floorspace

4.45 Available food and beverage expenditure has been projected forward to 2025, 2030 and 2035, and is summarised in Table 9A and Table 9B in Appendix 4. The baseline figures suggest the amount of expenditure attracted to the County Borough is expected to increase from £142.07 million in 2022 to £162.97 million in 2035. A breakdown for the six zones is set out in Table 4.10.

Table 4.10 Food/beverage base year turnover in 2022

Zone	Turnover £M
Zone 1 – Caerphilly southwest	68.69
Zone 2 – Risca/Pontymister/Bedwas	13.00
Zone 3 – Nelson	7.59
Zone 4 – Ystrad Mynach	4.03
Zone 5 – Bargoed/Blackwood	46.53
Zone 6 - Rhymney	2.23

Source: Table 9 in Appendix 4.

4.46 Table 10A and Table 10B in Appendix 4 subtract the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure available for new development. The baseline figures suggest a small expenditure surplus of £2.95 million in 2025. Population and expenditure growth increases this expenditure surplus to £7.36 million at 2030 and £11.39 million by 2035. Baseline and high growth floorspace capacity projections are shown in Tables 10A and 10B in Appendix 4 and summarised in Tables 4.11 and 4.12 below.

4.47 The baseline figures suggest a small surplus expenditure projection up to 2025, which indicates an under supply of food/beverage floorspace of 581 sq.m gross, which will increase to 1,415 sq.m gross in 2030 and 2,135 sq.m gross in 2035.

Table 4.11 Baseline food/beverage floorspace capacity (sq.m gross) - cumulative

Zone	2025	2030	2035
Zone 1 – Caerphilly southwest	281	699	1,069
Zone 2 – Risca/Pontymister/Bedwas	48	121	183
Zone 3 – Nelson	36	86	126
Zone 4 – Ystrad Mynach	17	40	59
Zone 5 – Bargoed/Blackwood	191	450	669
Zone 6 - Rhymney	8	19	29
Total	**581**	**1,415**	**2,135**

Source: Table 10A, Appendix 4.

4.48 The high growth figures suggest capacity for 811 sq.m gross in 2025, increasing to 2,113 sq.m gross by 2030 or 3,286 sq.m gross in 2035.

4.49 Food/beverage outlets total 171 units in the principal town centres and local centres. These facilities are distributed throughout the designated centres, but the main concentrations are in Caerphilly town centre (40 outlets) and Blackwood (33 outlets). Bargoed, Ystrad Mynach, Risca/Pontymister, Nelson and Newbridge have a reasonable choice of food/beverage outlets (12 or more outlets), but provision in Rhymney and Bedwas is limited. There appears to be qualitative potential to improve evening economy related food/beverage uses, based on the health check analysis of centres in this area as shown in Appendix 5.

Table 4.12 High growth food/beverage floorspace capacity (sq.m gross) - cumulative

Zone	2025	2030	2035
Zone 1 – Caerphilly southwest	431	1,125	1,766
Zone 2 – Risca/Pontymister/Bedwas	60	156	239
Zone 3 – Nelson	57	149	235
Zone 4 – Ystrad Mynach	21	56	86
Zone 5 – Bargoed/Blackwood	235	607	928
Zone 6 - Rhymney	8	21	31
Total	**811**	**2,113**	**3,286**

Source: Table 10B, Appendix 4.

Retail and food/beverage summary

4.50 The baseline quantitative floorspace capacity projections suggest expenditure and population growth up to 2035 will be offset by the growth in home shopping and increases in sales densities. As a result, there is no residual expenditure growth to support new floorspace. These projections assume Caerphilly County Borough will maintain its existing market share of expenditure in the study area.

4.51 The high growth scenario suggests some capacity for additional retail floorspace in the longer term i.e. in 2030 and 2035.

4.52 In qualitative terms, the County Borough has a good choice of large food superstores, supermarkets and smaller convenience stores. There are no obvious areas of deficiency in food store provision.

4.53 Collectively, the County Borough has a mix of national retailers and independent shops that provide a good range and choice of comparison shops. However, most comparison goods shops are concentrated in Caerphilly and Blackwood. Other shopping destinations provide a limited range and choice of comparison shops. Cardiff, Newport, Merthyr Tydfil and Pontypridd will limit the potential for the County Borough to increase its market share of comparison goods expenditure.

4.54 The provision of restaurants and bars serving the evening economy is strongest in the Caerphilly and Blackwood. There is potential to improve the evening and night-time economy related to food/beverage uses in centres across the County Borough.

4.55 The implications of the floorspace capacity projections and qualitative need assessment for future policy are addressed in Section 6.

5.0 Leisure, entertainment and cultural uses

Introduction

5.1 This section assesses the need for other main town centre uses including commercial leisure, entertainment and cultural uses i.e. cinema/multiplex, tenpin bowling, bingo, theatres, nightclubs and private health and fitness clubs. The assessment excludes less intensive sports and recreation uses, not typically found in town centres, such as swimming pools, sports halls and sports pitches.

Leisure and cultural expenditure

5.2 Experian local expenditure data for the Caerphilly County Borough study area, as shown in Appendix 1, indicates the resident population generated £32.8 million in 2022 (an average of about £154 person) on selected cultural, recreational and sporting services, broken down as follows:

- cinema admissions £3.5 million;
- live entertainment i.e. theatre/concerts/shows £6.6 million;
- museums, theme parks, houses and gardens £3.9 million;
- admissions to clubs, dances, discos, bingo £3.7 million;
- other miscellaneous entertainment £2.7 million;
- subscriptions to sports, social clubs and leisure £6.8 million; and
- leisure class fees £5.6 million.

5.3 Not all leisure/cultural spend from residents will be spent in the County Borough. The household survey results have been used to estimate the household participation rates and the retention for leisure trips within the study area, as shown in Table 5.1.

Table 5.1 Leisure participation and trip retention (% of households in the study area)

Leisure activity	% Households participating	% Trips attracted to Caerphilly County Borough
Cinema	42.8	61.4
Theatre	24.7	9.9
Nightclubs/live music venues	12.1	10.1
Bingo	7.1	11.5
Gyms/health and fitness club	21.3	72.5
Tenpin bowling/ gaming	11.5	44.4
Trampoline park	5.4	0.0
Museums and art galleries	19.9	0.0

Source: NEMS household survey results April 2022

5.4 The participation and retention rates varies significantly for each activity. Less than 20% of households do not participate in any of the eight leisure activities explored by the household survey. Many residents travel outside the study area e.g. to Cardiff and Bristol for some leisure activities, particularly trips to theatres, museums and art galleries. The retention rate is highest for trips to cinemas, health/fitness clubs and tenpin bowling.

5.5 Taking these leisure trip retention rates into account and the split of cultural/entertainment expenditure shown above, it is reasonable to assume Caerphilly County Borough currently only retains about 40% of resident's total leisure expenditure within the study area, which based on Lichfields' experience reflects the County Borough's proximity to the much larger regional destination in Cardiff. Based on this estimated 40% market share, attracted leisure expenditure in 2022 is about £13.1 million.

5.6 Residents in the Country Borough have a relatively limited range of commercial leisure and entertainment uses within the authority area but there is excellent provision within neighbouring authorities e.g. Cardiff and Newport.

Leisure/cultural floorspace capacity

5.7 Experian's expenditure projections suggest leisure expenditure per person should increase in real terms by +3.2% between 2022 to 2025, or +8.6% between 2022 to 2030 and by +13.6% between 2022 to 2035, which will generate an additional +£1 million for these activities from the resident population in 2025 increasing to +£2.8 million by 2030 or £4.4 million by 2035.

5.8 With baseline population growth (+0.3% by 2025, +0.5% by 2030 or +0.9% by 2035) total leisure expenditure should increase from £32.8 million in 2022 to £37.6 million. Retained leisure expenditure (40%) on all leisure/cultural activities should increase from about £13.1 million in 2022 to £13.6 million by 2025; £14.3 million by 2030 and then £15.0 million by 2035, an additional £0.5 million by 2025, £1.2 million by 2030 or £1.9 million by 2035.

5.9 With high population growth (+1% by 2025, +2.7% by 2030 or +4.4% by 2035) total leisure expenditure should increase from £32.8 million in 2022 to £38.9 million. Retained leisure expenditure (40%) would increase from about £13.1 million in 2022 to £15.6 million by 2035, an additional £2.5 million.

5.10 These levels of retained expenditure growth are relatively modest and reflect the low level of expenditure retained in the County Borough (40%). If the County Borough can increase expenditure retention from 40% to 50% then the level of additional expenditure available in 2025 would be +£3.9 million; +£4.8 million by 2030 and then +£5.7 million by 2035, adopting the baseline growth projections.

5.11 Based on Lichfields experience, leisure floorspace normally trades on average around £2,000 per sq.m gross. If leisure/cultural expenditure attracted to Caerphilly County Borough increased by £3.9 million in 2025 and then to £4.8 million and £5.7 million, as indicated above, then this additional expenditure could support about 2,000 sq.m gross of new commercial leisure and cultural floorspace by 2025, based on an assigned average of £2,000 per sq.m, increasing to 2,400 sq.m gross by 2030 and 2,900 sq.m gross by 2035.

5.12 This analysis provides a broad brush global floorspace capacity analysis. A more detailed sector by sector assessment is set out in the remainder of this section.

Cinemas

5.13 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 17 million in 2019 (Source: British Film Institute). Cinema trips have not increased significantly since 2002, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The national average (pre-Covid) visitation rate was about 2.6 trips per person per annum, with average box office receipts of over £7 per trip. The BFI indicate the Welsh average in 2019 was lower at 2.4 trips per person.

5.14 During 2020 the number of UK cinema admissions reduced to 44 million due to the Covid-19 lockdowns but recovered to 74 million trips in 2021. The number of trips during the on-going Covid-19 crisis will have reduced significantly. The need assessment assumes cinema admissions will recover to pre-Covid levels by 2025, i.e. 2.4 trips per person in Wales.

5.15 The BFI identities 843 cinema facilities with 4,596 screens and 937,161 seats in the UK. Lichfields' national CINeSCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average is about 38,000 cinema trips per annum for each cinema screen or 190 trips per annum for each seat available.

5.16 There is only one cinema in Caerphilly County Borough. Maxime in Blackwood has 5 screens and 598 seats.

5.17 The 2022 population within the study area is 213,427, which would generate approximately 512,000 cinema trips in total, assuming the pre-Covid Welsh average of 2.4 trips per person. The household survey results indicate over 49% of households visit cinemas. The household survey results suggest Caerphilly County Borough attracted 61.4% of cinema trips in the study area equating to 314,500 cinema trips in 2022, based on pre-Covid visitation rates.

5.18 Experian's local expenditure data indicates the study area generates £3.5 million on cinema trips. This expenditure estimate appears to be consistent with the 512,000 cinema trips estimated above i.e. it implies an average of about £7 per person each trip. This figure suggests that the cinema visitation rate in Caerphilly County Borough is in line with the Welsh average (2.4 trips per annum per person).

5.19 The baseline population within the study area is projected to increase to 215,350 by 2035, generating 517,000 cinema trips in total, again based on the pre-Covid Welsh average visitation rate. The high growth population (222,923 in 2035) would generate 535,000 trips. If Caerphilly County Borough continues to attract 61.4% of these trips, then 317,400 cinema trips will be made to facilities in Caerphilly County Borough in 2035 or 328,500 trips based on the high growth scenario.

5.20 Adopting the UK average trips per cinema screen (38,000 trips per screen), implies that 317,000 to 328,500 cinema trips would generate demand for at least 8 cinema screens. In terms of seats, the UK average (190 trips per seat) suggests 317,000 to 328,500 trips could support 1,668 to 1,728 seats. These projections suggest an under-supply of 3 screens or at least 1,070 seats in 2035, which could accommodate a small boutique cinema.

5.21 These projections suggest that there is theoretical capacity for a further cinema within Caerphilly County Borough. However, the presence of 6 multiplex cinemas in Cardiff and other cinemas in Newport, Nantgarw and Merthyr Tydfil may limit operator demand for an additional facility. Furthermore, the longer-term impact of the Covid-19 on the number of cinema trips may reduce this theoretical capacity.

Theatres, nightclubs, live music and other cultural activities

5.22 The household survey results indicate less than 25% of respondents in the study area visit theatres; about 12% visit nightclubs/live music venues and less than 20% visit museums/art galleries.

5.23 The UK Theatre and Society of London Theatres (SOLT) indicated their member organisations (223) presented nearly 63,000 performances attracting over 34.35 million tickets visits, generating ticket revenue of £1.28 billion in 2018 (pre-Covid). The average ticket revenue per venue is £5.7 million. The UK average attendance per performance is 545.

5.24 The household survey results indicate the participation rate for theatres is relatively low (25%). The main destinations for households participating are primarily in Cardiff. The main destinations local to Caerphilly County Borough were Blackwood Miners Institute (5%) and Blackwood Little Theatre (4%).

5.25 Caerphilly County Borough's market share of all theatre trips generated by the study area resident population is less than 10%. Experian's local expenditure data indicates the study area generates £6.6 million on live theatre, concerts and shows. Based on the average ticket revenue per venue (£5.7 million) the study area population generates theoretical demand for only one venue. The high growth scenario suggests leisure expenditure is projected to increase by about 18.6% by 2035, which suggests the study area expenditure on live theatre, concerts and shows could increase to £7.8 million, and additional £1.2 million. These expenditure figures, low market share and the availability of two small theatres in Blackwood suggest there is limited potential for a new theatre in the County Borough.

5.26 The nightclub sector has struggled in recent years. IBISWorld (providers of global industry research) suggests these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.

5.27 The household survey results indicate the participation rate for nightclub venues is relatively low (12%) and most residents in the study area visit nightclub venues in Cardiff. Caerphilly County Borough's market share of participating households in the study area is only 10%.

5.28 The household survey results indicate the participation rate for museums/art galleries is higher at 19.9%. Many destinations were mentioned by households participating in this activity. Caerphilly County Borough did not attract any participating households in the household survey results. The main destinations were:

- National Museum Cardiff 35.5%;
- Cardiff Castle Museum 17.5%;
- St. Fagan's National Museum of History 8.9%;
- Techniquest, Cardiff 3.9%.

5.29 Experian's local expenditure data indicates the study area generates £3.9 million on museums, theme parks, houses and garden, which could increase to £4.6 million by 2035 based on the high growth scenario. Leisure expenditure retained in the County Borough is likely to be relatively small. However, if Caerphilly County Borough can increase its market share, reducing the leakage of trips from the local area, then the potential for growth will be more significant.

5.30 Based on existing market shares, there is no clear qualitative or quantitative need for additional theatre, music/nightclub or cultural provision in Caerphilly County Borough. However, there may be potential to increase the Borough's market share and attract more demand from visitors if provision is improved. The development strategy needs to be flexible to respond to emerging opportunities for attractive new facilities of this kind.

Health and fitness clubs

5.31 The 2019 State of the UK Fitness Industry Report revealed that the UK health and fitness industry was continuing to grow pre-Covid. In 2019 there were more than 10 million fitness members in the UK and the industry was worth £5 billion, with a participation rate of 15.6%. The sector has more clubs, more members and a greater market value than ever before. The 2019 report highlighted that the industry experienced growth over the twelve-month period to the end of March 2019, with an increase of 4.7% in the number of memberships and 2.9% growth in the number of facilities.

5.32 The Sport Wales data indicates that there are 36 registered health and fitness facilities in Caerphilly County Borough, with 1,176 fitness stations. The main facilities with 30 fitness stations or more are shown in Table 5.3.

Table 5.3 Caerphilly County Borough health and fitness facilities (Sport Wales 2022)

Name	No. Fitness Stations
Planet Fitness	100
Newbridge Leisure Centre	80
Quest Fitness Club	75
Fitness Solutions	60
Platinum Fitness Centre	55
Caerphilly Leisure Centre	52
Risca Leisure Centre	50
Risca RFC Sports and Leisure Complex	50
Snap Fitness (Blackwood)	50
Team Rees Gym	50
Heolddu Leisure Centre	45
Crezione	40
Pontllanfraith Leisure Centre	39
Bryn Meadows Golf & Country Club Hotel	32
Elite Fitness	30
Olympic Studios	30
PA Fitness	30
Vifit Gym	30

5.33 The household survey results indicate over 21% of households visit health and fitness gyms. The survey results also suggest Caerphilly County Borough attracted over 72% of gym trips in the study area equating to a catchment population of about 155,000 in 2022. This Caerphilly County Borough catchment population (155,000) suggests an average of 7.6 fitness stations per 1,000 people in 2022, which is consistent with the GB national average of around 7 stations per 1,000 people. These figures suggest a small current over-supply of 91 fitness stations, if participation rates in Caerphilly County Borough were the same as GB average.

5.34 The population within the study area is projected to increase by between 0.9% and 4.4% by 2035. Caerphilly County Borough's catchment population for gyms would increase only marginally by about 1,400 people based on the baseline population growth, or 6,800 people based on the high population growth scenario. The additional 1,400 to 6,800 people could support between 10 to 48 additional fitness stations by 2035.

5.35 Demand for additional facilities within Caerphilly County Borough could also arise from increased participation rates. As indicated above, the study area population generates £6.8 million on subscriptions to sports and social clubs, which equates to about £5,800 per fitness station in the County Borough.

5.36 Experian's medium and long term expenditure projections suggest leisure expenditure per person should increase in real terms by 13.6% between 2022 to 2035, which is likely to include an increase in participation rates. With baseline population growth (+0.9%), leisure expenditure on this activity in attracted to Caerphilly County Borough should increase from £6.8 million to £7.8 million by 2035, an additional +£1.0 million. Based on £5,800 per fitness station, this additional expenditure could support 172 new fitness stations by 2035, about 3 to 4 medium sized facilities. This could be a reasonable maximum requirement for new gym facilities in the County Borough up to 2035.

Tenpin bowling and other indoor leisure innovations

5.37 As indicated in Section 2, freed-up space in town centres has provided new opportunities for leisure uses. Vacated premises have been reconfigured and reused for trampolines, climbing, indoor golf, escape rooms etc. These and other innovations are likely to continue in the future because landlords will adopt a flexible approach to respond to arising opportunities.

5.38 Tenpin Cardiff Nantgarw is within the study area just outside the County Borough boundary. This facility has 24 lanes. The household survey results suggest the tenpin bowling participation rate is just over 11% in the study area. The market share of the existing facility at Nantgarw is 44.4%, but this facility will attract significant numbers of customers from outside the study area.

5.39 There are several tenpin bowling facilities in Cardiff i.e. Superbowl Cardiff (12 lanes), Hollywood Bowl (26 lanes) and Hollywood Bowl at Cwmbran (20 lanes). Also in the surrounding area there is Superbowl at Merthyr Tydfil (14 lanes) and Newport (12 lanes). In total there are 108 lanes available within the sub-region. The theoretical population to support these facilities (108 lanes) is 1.3 million people, based on one lane per 12,000 people (UK average).

5.40 Population within the study area (213,427 in 2022) could in theory support 18 lanes. Existing provision at Nantgarw (24 lanes) is adequate to meet demand.

5.41 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This format first seen in America has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce in 2014.

5.42 Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts including a Main Arena, Dodgeball Court, Kids Court, Slam Dunk Area, Foam Pit, Airbag Jump, Touch Walls, Gladiator Pits and Tumble Tracks, as well as an arcade and party rooms. These types of facilities have emerged in South Wales but not in Caerphilly Country Borough.

5.43 The household survey results indicate only 5% of respondents in the study area visit Trampoline centres. Trampoline destinations mentioned by households participating in this activity were:

- Axis Trampoline Club, Liberty Industrial Park, Bristol (4%)
- Buzz Trampoline Park, Cardiff (13%)
- Infinity Trampoline Park, Cardiff (8%)
- Jump Adventure Trampoline Park, Newport (32%)
- Supajump Trampoline Park, Cardiff (6%)
- Vertigo Trampoline Park, Cyfarthfa Industrial Estate, Merthyr Tydfil (24%)

5.44 There may be scope for a trampoline park in Caerphilly County Borough, but this sector is still relatively new and its potential for continued growth is unclear. Caerphilly County Borough's strategy should be flexible to respond to any emerging demand for a trampoline centre, this could include repurposed large spaces vacated within town centres.

Bingo, games of chance and gambling

5.45 Gala (now Buzz Bingo) and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.

5.46 The Gambling Commission indicates there were 646 bingo facilities in Great Britain (2020) and 156 casinos. This equates to approximately one bingo facility per 75,000 adults, and one casino per 330,000 adults.

5.47 The household survey results suggest the bingo participation rate is just over 7.1% of households, which is higher than the UK average participation rates is around 5%. However, Caerphilly County Borough's market share of bingo trips in the study area is relatively low at 11.5%. The adult population (about 169,000 in 2022) in the study area is theoretically capable of supporting 2.3 bingo facilities and 0.5 casinos, based on the UK averages. The main bingo destinations mentioned by households participating in this activity were:

- Castle Bingo, Merthyr Tydfil (25%)
- Castle Bingo, Pontypridd (14%)
- Castle Bingo, Treforest (12%)
- Castle Bingo, Newport (10%)

- Club 3000 Bingo, Cwmbran (8%)
- Fortuna Bingo, Ystrad Mynach (7%)
- Club 3000 Bingo, Cardiff (6%)
- Castle Bingo, Nantgarw (6%)
- Top Ten Bingo, Blackwood (1%)

5.48 Fortuna Bingo and Castle Bingo at Nantgarw are the only major bingo halls in the study area. Top Ten Bingo has permanently closed. Residents also have access to Bingo facilities in surrounding towns. There is no theoretical scope for an additional bingo facility in Caerphilly County Borough, and the presence of existing facilities may limit operator demand. The growth in on-line gambling is also likely to reduce demand for bingo halls.

Commercial leisure uses summary

5.49 The leisure, entertainment and cultural sectors are fragmented and innovative. In addition to the main leisure and entertainment uses outlined above, there are many other activities that could be promoted e.g. nightclubs, museums, art galleries, exhibition space, tourist attractions and new emerging leisure activities such as escape rooms and virtual golf centres. The representation of these emerging uses is relatively limited in Caerphilly County Borough. Given the fragmented nature of these sectors it is difficult to precisely quantify the potential demand for these uses over the next 15 years.

5.50 In global terms future expenditure growth and increase retention could support about 2,900 sq.m of new commercial leisure and cultural floorspace in Caerphilly County Borough by 2035. This additional floorspace could include:

1 3 to 4 additional medium sized health and fitness facilities (about 170 new fitness stations);
2 a small boutique cinema; and.
3 a trampoline centre or other new leisure innovations e.g. indoor climbing, escape rooms, virtual sport activities.

5.51 Along with the projected need for additional food/beverage floorspace outlined in Section 4, the potential for new commercial leisure and cultural uses provides an opportunity to enhance the evening and night-time economy within the main centres in the County Borough. The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities.

6.0 Implications for planning policy

Accommodating growth and change

6.1 For planning policies, local authorities should support the role of town centres by:

1 defining a network and hierarchy of centres, allowing them to grow and diversify;

2 defining the extent of centre boundaries and primary shopping areas, making clear the uses permitted in these locations;

3 allocating suitable opportunities to meet development needed;

4 application of the sequential approach for development i.e. town centre, then edge-of-centre followed by accessible out-of-centre sites.

6.2 PPW acknowledges the rapid changes that are affecting town centres. Diversification will be key to the long-term vitality and viability of town centres. Accordingly, planning policies should clarify the range of uses permitted in such locations, as part of a positive strategy for the future of each centre. The importance of a mix of retail and other town centre activity has increased in recent years and town centres increasingly need to compete with on-line shopping. Town centres need a better mix of uses that extend activity throughout the daytime and into the evenings as is acknowledged by PPW.

Floorspace capacity projections

6.3 The assessment of the potential for new retail, food/beverage floorspace within the previous sections suggests there is modest long-term scope for new development within Caerphilly County Borough adopting baseline population projections. Tables 6.1, 6.2 and 6.3 below summarise the baseline floorspace requirements in Caerphilly County Borough up to 2025, 2030 and 2035 (cumulative). The high growth projections are shown in Tables 6.4, 6.5 and 6.6.

6.4 These projections assume Caerphilly County Borough can maintain its market share of expenditure in the future. This approach recognises that additional development within the County Borough could help to increase the area's market share, but this increase will be counter-balanced by development within competing centres. A balanced and sustainable approach has been adopted.

6.5 Table 6.1 indicates there is a combined projected over-supply of 1,886 sq.m gross of retail and food/beverage floorspace in 2025. By 2030 this combined over-supply reduces to 1,506 sq.m gross. In 2035 the over-supply is only 354 sq.m gross.

6.6 The baseline floorspace projections suggest there is no need to identify development site allocations to accommodate new floorspace. In many cases there is a negative floorspace projection which may lead to an increase in vacant shop units. The requirement for new food/beverage uses could be accommodated in vacant shop units.

6.7 The need assessment in this report assumes that existing retail and service floorspace can, on average, increase its turnover to sales floorspace densities. In addition to the growth in sales densities, vacant shop premises could help to accommodate future growth.

Table 6.1 Baseline retail and food/beverage floorspace requirements up to 2025 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
1 – Caerphilly southwest	575	-444	281	**412**
2 – Risca/Pontymister/Bedwas	-244	-55	48	**-251**
3 – Nelson	-271	-3	36	**-238**
4 – Ystrad Mynach	-592	-64	17	**-639**
5 – Bargoed/Blackwood	-1,056	-273	191	**-1,138**
6 - Rhymney	-36	-5	8	**-33**
Total	**-1,624**	**-843**	**581**	**-1,886**

Table 6.2 Baseline retail and food/beverage floorspace requirements up to 2030 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
1 – Caerphilly southwest	580	-572	699	**707**
2 – Risca/Pontymister/Bedwas	-277	-82	121	**-238**
3 – Nelson	-270	-3	86	**-187**
4 – Ystrad Mynach	-605	-99	40	**-664**
5 – Bargoed/Blackwood	-1,115	-430	450	**-1,095**
6 - Rhymney	-39	-8	19	**-28**
Total	**-1,725**	**-1,196**	**1,415**	**-1,506**

Table 6.3 Baseline retail and food/beverage floorspace requirements up to 2035 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
1 – Caerphilly southwest	716	-443	1,069	**1,342**
2 – Risca/Pontymister/Bedwas	-249	-86	183	**-152**
3 – Nelson	-264	-2	126	**-140**
4 – Ystrad Mynach	-567	-90	59	**-598**
5 – Bargoed/Blackwood	-1,042	-414	669	**-787**
6 - Rhymney	-38	-9	29	**-18**
Total	**-1,444**	**-1,045**	**2,135**	**-354**

Source: Table 11A in Appendix 2 and Tables 10A in Appendix 3 and 4.

Table 6.4 High growth retail and food/beverage floorspace requirements up to 2025 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
1 – Caerphilly southwest	795	64	431	**1,290**
2 – Risca/Pontymister/Bedwas	-222	-44	60	**-206**
3 – Nelson	-260	3	57	**-200**
4 – Ystrad Mynach	-538	-13	21	**-530**
5 – Bargoed/Blackwood	-982	-131	235	**-878**
6 - Rhymney	-36	-5	8	**-33**
Total	**-1,242**	**-125**	**811**	**-556**

Table 6.5 High growth retail and food/beverage floorspace requirements up to 2030 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
1 – Caerphilly southwest	1,170	830	1,125	**3,125**
2 – Risca/Pontymister/Bedwas	-219	-54	156	**-117**
3 – Nelson	-237	14	149	**-74**
4 – Ystrad Mynach	-427	71	56	**-300**
5 – Bargoed/Blackwood	-854	55	607	**-192**
6 - Rhymney	-37	-7	21	**-23**
Total	**-606**	**909**	**2,113**	**2,416**

Table 6.6 High growth retail and food/beverage floorspace requirements up to 2035 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
1 – Caerphilly southwest	1,659	1,805	1,766	**5,230**
2 – Risca/Pontymister/Bedwas	-161	-43	239	**35**
3 – Nelson	-209	28	235	**54**
4 – Ystrad Mynach	-270	189	86	**5**
5 – Bargoed/Blackwood	-621	372	928	**679**
6 - Rhymney	-36	-7	31	**-12**
Total	**362**	**2,343**	**3,286**	**5,991**

Source: Table 11B in Appendix 2 and Tables 10B in Appendix 3 and 4.

6.8 The high growth projections suggest a much smaller short-term over-supply (556 sq.m gross) and much higher capacity for additional floorspace in 2030 and 2025.

Vacant shop premises

6.9 Based on current land use data there are 124 vacant shop units within Caerphilly County Borough's main and local centres, an average vacancy rate of 12.8%, which is slightly below lower than the UK (14.7%). Based on an average of 80 sq.m gross per unit, the total amount of vacant floorspace in the main and local centres could be about 9,900 sq.m gross. It is reasonable to assume the number of vacant units could reduce by at least a third, i.e. to a lower vacancy rate of around 8%. This reduction in the shop vacancy rate could accommodate over 3,000 sq.m gross of new uses, which could meet most of the projected positive floorspace capacity figures i.e. in Zone 1 Caerphilly (1,785 sq.m gross) and the food/beverage floorspace capacity across the County Borough up to 2035 (2,135 sq.m gross), excluding any allowance for additional vacated floorspace released through the closure of retail uses.

6.10 The baseline projections and shop vacancy rates suggest there is no quantitative need to increase the combined amount of retail and food/beverage floorspace in Caerphilly County Borough up to and beyond 2035. However, there is likely to be a shift in retail space to food/beverage and leisure/cultural uses, with some vacant shop premises also converting to these uses. Not all vacant shop units will be suitable for conversion to leisure/cultural uses, therefore new development may be required to accommodate new uses.

6.11 The high growth projections suggest up to 5,991 sq.m gross could be required by 2035. Vacant shop units could accommodate about half of this requirement.

Hierarchy of centres

6.12 PPW (4.3.10) requires planning authorities to establish a retail and commercial hierarchy within their development plan strategy. Paragraph 4.3.12 goes onto say that planning authorities should take account,

"of the size, scale, form, function and location of the retail and commercial centres within an area [and]*…should consider the characteristics of each type of centre so they can be consistently categorised."*

6.13 Paragraph 4.3.12 goes onto say that the retail and commercial hierarchies,

"should distinguish between higher order centres which have a wider range of uses and larger catchment areas, and lower order centres which are important to communities for day-to-day needs."

6.14 The current Development Plan (Policy SP4 – Settlement Strategy) designates Caerphilly, Blackwood, Bargoed, Ystrad Mynach and Risca/Pontymister as Principal Town Centres supported by the four Local Centres of Rhymney, Nelson, Newbridge and Bedwas. Policies CM2.1 and CM2.2 also recognise the two retail warehouse parks at Gallagher and Blackwood Gate and the roles they play in accommodating out-of-centre retailing albeit that they do not fall within the defined hierarchy of centres set out within Policy SP4.

6.15 Supporting paragraph 1.62 states that Policy SP4,

"identifies five Principal Towns and four Local Centres based on their functions as major employers, retail centres, providers of services and centres of population."

6.16 Paragraph 1.62 goes onto say,

"the Plan seeks to enhance these areas based on their current role and function in order to respond appropriately to the economic, social and environmental needs of individual settlements."

6.17 Policies CM1.1, CM1.2, CM1.3, CM1.4 and CM1.5 identify definitive boundaries for the following Principal Town Centres:

- CM1.1 Bargoed (Heads of the Valleys Regeneration Area);

- CM1.2 Blackwood (Northern Connections Corridor);
- CM1.3 Ystrad Mynach (Northern Connections Corridor);
- CM1.4 Risca/Pontymister (Southern Connections Corridor); and,
- CM1.5 Caerphilly (Southern Connections Corridor).

6.18 Supporting paragraphs 3.38, 3.122 and 3.208 of Development Plan Policies CM1.1 – CM1.5 state the five Principal Towns are the main shopping centres, but also centres for commercial leisure too; and,

"therefore, retail policies have been formulated which aim at protecting and enhancing their retail vitality and viability."

6.19 Supporting paragraphs 3.123 and 3.209 of Development Plan Policies CM1.2 – CM1.5 state,

"the main thrust of the retail strategy is to continue to expand overall retail provision in the County Borough through the growth of high-quality shopping centres which retain the best existing features combined with provision for new shopping investments and environmental enhancement. Therefore, policies seek to focus retail developments within existing shopping centres and defined edge of centre locations to accommodate specific types of stores."

6.20 Policy CM1.2 and CM1.3 supporting paragraph 3.124 states that Blackwood and Caerphilly are the largest centres in the County Borough, in terms of retail floorspace, service provision and commercial leisure facilities and therefore they should be maintained at the top of the hierarchy. Policy CM1.1 supporting paragraph 3.28 identifies Bargoed as the third largest centre, where retailing is considered a vital component. Risca/Pontymister Principal Town Centre is smaller, but policies CM1.4 and CM1.5 supporting paragraph 3.211 states that it is an important retail centre and has potential for significant new retail provision. Policies CM1.2 and CM1.3 supporting paragraph 3.125 states that although Ystrad Mynach Principal Town Centre contains both a Tesco Superstore and a Lidl it is more important for its office and health roles, hence why it is the smallest Principal Town Centre within the County Borough. Generally, the Local Centres are smaller again in size and service the needs of the local communities albeit Newbridge is comparable in size to Ystrad Mynach. All Principal Town Centres and Local Centres are shown in Appendix 1 (Study Area / Centre Network) below.

Gallagher Retail Park and Blackwood Gate Retail Warehouse Parks

6.21 Policies CM2.1 and CM2.2 identify definitive boundaries for the following retail warehouse parks:

- CM2.1 Blackwood Gate, Blackwood (Northern Connections Corridor); and,
- CM2.2 Gallagher Retail Park, Caerphilly (Southern Connections Corridor).

6.22 Policy CM2.1 supporting paragraph 3.128 and Policy CM2.2 supporting paragraph 3.214 state that Blackwood Gate and Gallagher Retail Warehouse Parks have been given defined boundaries to promote their development in advance of sites in other less appropriate out-of-centre locations coming forward. They have also been chosen to complement Caerphilly and Blackwood's existing retail offer.

Policy CW17 (Locational Constraints – Retail Warehousing) states:

"Proposals for new retail warehouse units, or for change of use to retail warehouse units, on sites outside of the designated Retail Warehouse Parks will only by permitted if there are no suitable sites or units available within those Parks or within the defined Principal Town Centres."

6.23 Based on the above and the scale of facilities available within each centre and retail warehouse park, we suggest that the current retail hierarchy (as set out within Policy SP4) and requirements associated with the existing retail warehouse parks (as set out within Policies CM2.1, CM2.2 and CW17) is generally fit for purpose, but the Council may consider the following update which reflects the size, scale and retail offers of each individual centre/retail warehouse park:

6.24 Consideration of a three-tier strategy (or four tier if including Blackwood Gate and Gallagher Parks) as follows:

(a) Caerphilly, Blackwood and Bargoed;

(b) Ystrad Mynach, Risca/Pontymister and Newbridge;

(c) Bedwas, Rhymney and Nelson;

(d) Retail Warehouse Parks (Blackwood Gate and Gallagher).

Town centre boundaries / Primary retail areas

6.25 The current Development Plan includes the following policies:

- **Policies CM1.1, CM1.2, CM1.3, CM1.4 and CM1.5**, which identify town centre boundaries for the following Principal Town Centres:
    - i CM1.1 Bargoed (Heads of the Valleys Regeneration Area);
    - ii CM1.2 Blackwood (Northern Connections Corridor);
    - iii CM1.3 Ystrad Mynach (Northern Connections Corridor);
    - iv CM1.4 Risca/Pontymister (Southern Connections Corridor); and,
    - v CM1.5 Caerphilly (Southern Connections Corridor).
- **Policies CM3.1 and CM3.2**, which identify the following Primary Retail Areas within the Principal Town Centre boundaries of Caerphilly and Blackwood:
    - i Policy CM3.1 High Street, Blackwood; and,
    - ii Policy CM3.2 Castle Court, Caerphilly.

6.26 The Development Plan does not define primary retail areas for the Principal Town Centres of Bargoed, Risca/Pontymister or Ystrad Mynach nor does it define primary or secondary shopping frontages for any of the Principal Town Centres.

6.27 Local Centres are defined within Policy SP4 (Settlement Strategy), which incorporate the smaller centres e.g. Rhymney, Nelson, Newbridge and Bedwas. The Development Plan does not define the local centre boundaries, primary retail area or separate primary or secondary shopping frontages for any of the Local Centres within the Development Plan. As the retail areas within these Local Centres are well established it may be appropriate to formalise these boundaries within the Replacement Local Development Plan, as it may assist in the application of the sequential test.

6.28 The designation of a town centre boundary is important when applying the sequential approach, to direct retail and town centre uses to sustainable locations and determining whether a retail need/impact assessment is required.

6.29 PPW (4.3.10) recommends that planning authorities identify the boundaries of retail and commercial centres within their development plan strategy.

6.30 PPW (4.3.31) states,

"primary areas are typically characterised by a high proportion of A1 retail uses, and their designation requires an understanding of the existing distribution of uses in a centre together with careful consideration of a centre's role and how it relates to the retail strategy for the area. Secondary areas typically contain mixed uses."

6.31 PPW (4.3.35) recognises that where the right balance of use and activity is not being achieved, local planning authorities should consider making changes to the acceptable uses in primary or secondary areas, or the retail and commercial centre boundaries themselves. PPW (4.3.37) also recognises that where regeneration initiatives are unsuccessful within retail and commercial centres or the periphery of a retail and commercial centre has been assessed as being in decline by the planning authority, changes to the retail and commercial centre boundary may be appropriate.

6.32 PPW (4.3.36) also states,

"where economic decline is impacting on a retail and commercial centre, emphasis on retaining A1 uses in premises either in primary or secondary areas, which have been vacant for a period of time, may undermine a centre's viability and vitality. In such circumstances planning authorities should consider how non-A1 uses may play a greater role to increasing diversity and reducing vacancy levels."

6.33 The wording of PPW should be acknowledged in the context of the ever-increasing diversification of town centres as identified in Building Back Better and the recent consultation on town centre permitted development rights.

6.34 Taking the above into consideration, the wording of Policies CM1 and CM3 are in accordance with PPW. Most principal town centre boundaries appear fit for purpose, but based on Lichfields' site visits (April 2022), a small cluster of vacant units were noted towards the southern boundary of Caerphilly Principal Town Centre (off Cardiff Road) and the northern boundary of Bargoed Principal Town Centre (Hanbury Road and High Street). If the vacancies in these areas are long term, then there may be scope to exclude them from the centre boundaries to ensure they do not undermine the viability and vitality of these centres and to allow them to change to a different use.

6.35 In addition, the existing primary retail area boundaries of Caerphilly and Blackwood remain appropriate, and no changes are required. However, the boundaries of the local centres could be formalised. It is also important to consider Development Plan Policies

CW14 and CW16 as these set out what uses are acceptable within the centres, boundaries and primary retail areas.

Policy CW14 (Use Class Restrictions: Retail) states:

"Development proposals incorporating a change of use from class A1 retail premises to another use will be subject to the following restrictions:

A) Within identified Principal Town Centres, changes of use of the ground floors of class A1 retail premises to other uses will only be permitted where:

- i *The commercial vacancy rate of the centre has been over 10% for over a year and*
- ii *For a change to residential use the property is located on the edge of the centre.*

B) Within identified Primary Retail Areas, the change of use of the ground floors of class A1 retail premises to residential use will not be permitted.

C) Within identified Primary Retail Areas, proposals for new, or the change of use of the ground floors of class A1 retail premises to other class A uses will only be permitted where the total cumulative number of such units would not exceed 10% of the total number of commercial units within the Primary Retail Area."

6.36 **Part A** (i) of Policy CW14 relates to the commercial vacancy rate of the Principal Town Centres. According to the Caerphilly County Borough Council Land Use Survey data (2021), three Principal Town Centres had a vacancy rate over 10% in 2021, which suggests changes of use from Class A1 retail ground floor premises to other uses will be acceptable. The vacancy rate is close to 10% in Caerphilly Principal Town Centres, but only 3.4% in Ystrad Mynach. This 10% percentage vacancy threshold may in ineffective and could be removed, to reflect the recent policy push towards more diverse town centres. If the threshold is removed, then the policy should ensure that any new use would still retain an active frontage and contribute positively to the vitality and viability of the centre. Reference to Local Centres could also be included within this section of the policy if the LPA wish to formalise the boundaries of the Local Centres.

6.37 Part A (ii) of Policy CW14 is considered appropriate as residential use at ground floor within the centres should be resisted as it could detract from the health of the town centres due to the lack of an active frontage. Residential use above ground floor could be acceptable depending on amenity considerations and could positively impact on footfall in the town centre.

6.38 **Part B** of Policy CW14 does not allow for any change of use of the ground floors of Class A1 retail premises to residential uses within the Primary Retail Areas, which still appears appropriate. Residential use above ground floor could be acceptable depending on amenity considerations and could positively impact on footfall in the town centre.

6.39 **Part C** of Policy CW14 appears restrictive, and the Council could consider a more flexible approach by adopting a criterion-based policy. This would accord with the latest PPW (Edition 11) and the TAN4 (Retail and Commercial Development). Both documents emphasise that retailing (A1 uses) should continue to underpin the role of town centres, but these uses are only one element that contributes towards a centre's vibrancy and policies should encourage a diversity of uses in centres. However, given that the primary retail area is only a small area of the town centre, the Council may be justified in retaining this policy to seek to prioritise A1 uses in this location.

Policy CW16 (Locational Constraints: Retail) states:

"Outside of the defined Principal Town Centres proposals for new retail stores or for additional retail floorspace will only be permitted where:

A) The vitality and viability of nearby Principal Town Centres will not be undermined, taking into account the cumulative effects of other approved retail developments, recently completed developments and Plan commitments, and

B) The proposal would not undermine the Council's retail strategy, a Town Centre Action Plan or any regeneration plans that the Council has formally approved, or

C) The proposal is:

i *A new retailing unit of 1,000m2 or less in size, or the change of use of such a size, and*

ii *To serve neighbourhood needs or is ancillary to another commercial use."*

6.40 Policy CW16 duplicates the retail impact test set out in national planning policy, but not the sequential or needs tests, which also seek to control the location of new retail floorspace. Part C appears to introduce an embargo on all out of centre retail stores over 1,000 sq.m, regardless of whether the retail impact, need and sequential tests have been met, which does not appear to be consistent with PPW.

Summary on Policy Implications

6.41 Overall, the Council could consider one or a combination of the following:

1 There is no need to allocate large sites for new retail floorspace due to the low growth projections. The requirement for new food/beverage uses could be accommodated in vacant shop units.

2 The introduction of a three/four-tiered retail hierarchy as follows:

(a) Caerphilly, Blackwood and Bargoed;

(b) Ystrad Mynach, Risca/Pontymister and Newbridge;

(c) Bedwas, Rhymney and Nelson;

And potentially

(d) Retail Warehouse Parks (Blackwood Gate and Gallagher).

3 As the retail areas within the designated Local Centres are well established, it may be appropriate to formalise their boundaries within the replacement Local Development Plan.

4 There may be scope to exclude a cluster of vacant units towards the periphery of the southern boundary of Caerphilly Principal Town Centre (off Cardiff Road) and the northern boundary of Bargoed Principal Town Centre (Hanbury Road and High Street) from the existing centre boundaries.

5 Potential amendments to policy CW14 to allow more flexibility in terms of the uses that may be acceptable in the designated centres, moving towards a criterion based policy based on the impact on the vitality and viability of the centres.

6 Amendments to Policy CW16 for consistency with national planning policy.

Impacts and sequential tests

6.42 PPW explains that:

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

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

6.43 The replacement LDP should be consistent with the above.

6.44 In terms of sequential test this is also set out clearly in PPW and Future Wales.

6.45 However, Policy 6 of Future Wales goes further than PPW with regards to the sequential test as it states that 'significant new commercial, retail, education, health, leisure and public service facilities must be located within town and city centres'. The supporting text of this policy explains that this policy applies to developments of a significance scale, which can broadly be defined as where the facility will serve a town, city or region-wide catchment. However, it is up to local authorities to determine whether a development is of a significant scale.

6.46 This policy echoes the key messages from the Welsh Government about the need for town centres to be more than just retail and to be truly mixed-use areas that provide the local facilities and services that people want in their local community. In terms of how this policy is applied, each development should be assessed on its own merit against a set of criteria that could be established in the replacement LDP. This could look at matters such as:

1 The quantum and nature of the use;

2 Whether it is a use that would be acceptable in the town centre without having an unacceptable impact on existing operators and residents;

3 Whether there are specific reasons why it cannot locate in the town centre (i.e. the need for significant floorspace that is not available or that the use requires a particular transport mode that is not appropriate to the town centre);

6.47 It will be up to the applicant to provide robust justification as to why it cannot locate within the town centre.

6.48 The policy can also be used during the plan making process when allocating sites for commercial, retail, education, health, leisure and public services. A sequential approach should be followed to ensure that the benefits of the use can be realised within or as close as possible to the town centre. This policy is key to ensuring that town centres are integrated with day to day uses and this provides the opportunity to meet placemaking and sustainability policies set out in Future Wales and PPW.

6.49 However, pragmatism will be required where there is a development proposal that clearly needs to be located outside the town centre. The social and economic benefits of a proposal should not be dismissed just because there is a lack of sites in and on the edge of town centres and in some circumstances the use will not be appropriate in that location. In instances such as this it will be important to ensure that the sites are able to be reached via sustainable modes of transport including walking and cycling. For the smaller centres it will be important to balance the overall benefits of the proposal being located outside of the town centre.

7.0 Summary and Conclusions

7.1 This section draws together the analysis set out in previous sections and provides strategic recommendations for Caerphilly County Borough. It explores how the identified growth (or lack of growth) across the County Borough could be accommodated and the future role of the main centres.

Health of Retail Centres

7.2 The analysis of the hierarchy of centres indicates the Borough has a well-established network of centres that currently serve their respective areas. Caerphilly and Blackwood Principal Town Centres are similar in size and are the only centres with the potential to cater for a borough-wide catchment area.

7.3 Caerphilly is the largest centre in terms of the total number of retail/service units and the number of convenience goods retail outlets. The four remaining Principal Town Centres are smaller and vary significantly in terms of the total number of shop units i.e. between 89 to 212 units. All Principal Town Centres have a relatively good mix of retail and service facilities. The Local Centres are smaller and have a more limited range and choice of comparison and convenience goods shopping. They also vary significantly in size ranging from 28 to 76 units. Newbridge is the largest local centre (76 units) and is comparable to Ystrad Mynach Principal Centre in terms of number of units.

7.4 The average shop vacancy rate in the County Borough is 12.8%, which is lower than the UK average (14.7%). Bargoed Principal Town Centre has the highest vacancy rate (24.5%), which is significantly higher than the national average. Ystrad Mynach on the other hand has the lowest vacancy rate (3.4%), which is significantly lower than the national average.

7.5 The centres have a good mix of retail and service uses, but all centres except Caerphilly and Blackwood have a lower proportion of comparison goods retail units than the County Borough averages, and all centres have a lower proportion of comparison goods retail units compared to the national averages. All centres in the Borough have a reasonable proportion of convenience goods retail and a high proportion of non-retail services, but a low proportion of pubs/bars.

7.6 The centres have a varied provision of food/beverage outlets serving either the daytime or evening economies. Nelson, Bedwas and Rhymney Local Centres appear to have the strongest provision of pubs/bars whilst Caerphilly Principal Town Centre has the strongest provision of restaurants; both of which support the night-time economy.

7.7 Risca/Pontymister, Bargoed and Ystrad Mynach Principal Town Centres have the weakest provision of pubs/bar and Newbridge, Nelson, Rhymney and Bedwas Local Centres have the weakest provision of restaurants serving the evening economy. The proportion of hot food takeaways is higher than the UK average across the County Borough. The highest proportion of hot food takeaways is located within Nelson (15%) and the lowest is located within Caerphilly (6.4%).

Expenditure Retention

7.8 The household survey results suggest a high level (over 83%) of expenditure retention within the Study Area for convenience goods shopping. The retention of comparison goods expenditure is much lower (under 53% in the Study Area) due to the draw of larger centres outside the County Borough, primarily in Cardiff, Merthyr Tydfil and Newport. The retention of food/beverage expenditure is similar to comparison goods shopping at just under 54% with high expenditure outflow to Cardiff, Merthyr Tydfil and Newport.

7.9 The lowest levels of comparison goods expenditure retention (highest leakage or outflow) is from Zone 6 in the north of the County Borough, where leakage to Merthyr Tydfil is high. Leakage to Cardiff is relatively high across all zones (10% to 30%), with the highest proportional leakage from the southern area of the County Borough.

7.10 The results suggest good levels of expenditure retention for lower order comparison goods, such as DIY/hardware, health/beauty and books/stationery, but lower levels of retention for higher order goods, such as clothes and furniture.

Capacity for Convenience Goods Retail Floorspace

7.11 The baseline figures indicate there is a projected convenience goods expenditure deficit of -£13.89 million at 2025, because population and expenditure growth will be offset by an increase in home shopping (SFT) and increases in sales densities.

7.12 This baseline expenditure deficit is projected to increase to -£14.8 million at 2030. Continued population growth reduces the deficit to -£12.39 million at 2035. These projections suggest there in overall terms there is no capacity for additional convenience goods floorspace for the foreseeable future. However, there are locational variations across the County Borough.

7.13 The deficit expenditure projections suggest an over-supply of convenience goods floorspace in the County Borough of 1,725 sq.m gross in 2030 but decreasing to 1,444 sq.m gross by 2035. However, there is a positive capacity projection in Zone 1 – Caerphilly southwest due to higher population growth in this area and above average trading levels in the base year.

7.14 The high growth projections suggests a small over-supply in 2030 (606 sq.m gross) and a small surplus capacity for 362 sq.m gross in 2035.

7.15 Collectively, principal town centres and local centres within the County Borough have 70 convenience goods outlets including food stores operated by multiple retailers and smaller independent shops. Residents across the County Borough have good access to a range and choice of food stores. The most obvious areas of deficiency in food store provision is the rural area in the north of the Borough (Zone 6). Rhymney only has a small Premier convenience store. However, residents in this area have access to large food stores in Merthyr Tydfil, Tredegar and Ebbw Vale. Furthermore, the population in Zone 6 is dispersed over a wide area. The settlements in Zone 6 are probably too small to sustain a large food store.

Capacity for Comparison Goods Retail Floorspace

7.16 The baseline figures suggest by 2025 there is a projected expenditure deficit of -£3.38 million, which will increase to -£5.38 million by 2030, but longer term expenditure growth will reduce this deficit marginally to -£5.35 million in 2035. These projections suggest growth in turnover densities will absorb expenditure growth and there is likely to be an over-supply of comparison goods retail floorspace up to 2035.

7.17 These baseline projections suggest there is no capacity for additional comparison goods retail floorspace in the County Borough for the foreseeable future. The implied over-supply of floorspace is 1,196 sq.m gross in 2030, which will reduce marginally to 1,045 sq.m gross by 2035.

7.18 The high growth projections suggest no short term capacity in 2025 and a small requirement for 909 sq. m gross in 2030, increasing to 2,343 sq.m gross by 2035.

7.19 Collectively main and local centres within the County Borough have 205 comparison goods outlets including some national retailers, but mostly small independent shops. There are 13 comparison outlets within Gallagher Retail Park and Blackwood Gate Retail Park. Over half of the comparison goods shops are concentrated in Caerphilly and Blackwood. The remaining provision is relatively dispersed and most shopping destinations within the County Borough provide a limited range and choice of comparison shops. However, the County Borough is also served by Cardiff, Newport, Merthyr Tydfil and Pontypridd. These larger centres will limit the potential for the County Borough to increase its market share of comparison goods expenditure and reduce expenditure leakage.

Food and Beverage

7.20 The baseline figures suggest a small expenditure surplus of £2.95 million in 2025. Population and expenditure growth increases this expenditure surplus to £7.36 million at 2030 and £11.39 million by 2035.

7.21 The baseline figures suggest a small surplus expenditure projection up to 2025, which indicates an under supply of food/beverage floorspace of 581 sq.m gross, which will increase to 1,415 sq.m gross in 2030 and 2,135 sq.m gross in 2035.

7.22 The high growth figures suggest capacity for 811 sq.m gross in 2025, increasing to 2,113 sq.m gross by 2030 or 3,286 sq.m gross in 2035.

7.23 Food/beverage outlets total 171 units in the principal town centres and local centres. These facilities are distributed throughout the designated centres, but the main concentrations are in Caerphilly town centre (40 outlets) and Blackwood (33 outlets). Bargoed, Ystrad Mynach, Risca/Pontymister, Nelson and Newbridge have a reasonable choice of food/beverage outlets (12 or more outlets), but provision in Rhymney and Bedwas is limited. There appears to be qualitative potential to improve evening economy related food/beverage uses, based on the health check analysis of centres in this area as shown in Appendix 5.

Commercial Leisure and Other Town Centre Uses

7.24 The leisure, entertainment and cultural sectors are fragmented and innovative. In addition to the main leisure and entertainment uses outlined above, there are many other activities that could be promoted e.g. nightclubs, museums, art galleries, exhibition space, tourist attractions and new emerging leisure activities such as escape rooms and virtual golf centres. The representation of these emerging uses is relatively limited in Caerphilly County Borough. Given the fragmented nature of these sectors it is difficult to precisely quantify the potential demand for these uses over the next 15 years.

7.25 In global terms future expenditure growth and increase retention could support about 2,900 sq.m of new commercial leisure and cultural floorspace in Caerphilly County Borough by 2035. This additional floorspace could include:

1. 3 to 4 additional medium sized health and fitness facilities (about 170 new fitness stations);
2. a small boutique cinema; and.

3 a trampoline centre or other new leisure innovations e.g. indoor climbing, escape rooms, virtual sport activities.

7.26 Along with the projected need for additional food/beverage floorspace outlined in Section 4, the potential for new commercial leisure and cultural uses provides an opportunity to enhance the evening and night-time economy within the main centres in the County Borough. The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities.

Accommodating Growth

7.27 Based on current land use data there are 124 vacant shop units within Caerphilly County Borough's main and local centres, an average vacancy rate of 12.8%, which is slightly below lower than the UK (14.7%). Based on an average of 80 sq.m gross per unit, the total amount of vacant floorspace in the main and local centres could be about 9,900 sq.m gross. It is reasonable to assume the number of vacant units could reduce by at least a third, i.e. to a lower vacancy rate of around 8%. This reduction in the shop vacancy rate could accommodate over 3,000 sq.m gross of new uses, which could meet most of the projected positive floorspace capacity figures i.e. in Zone 1 Caerphilly (1,785 sq.m gross) and the food/beverage floorspace capacity across the County Borough up to 2035 (2,135 sq.m gross), excluding any allowance for additional vacated floorspace released through the closure of retail uses.

7.28 The baseline projections and shop vacancy rates suggest there is no quantitative need to increase the combined amount of retail and food/beverage floorspace in Caerphilly County Borough up to and beyond 2035. However, there is likely to be a shift in retail space to food/beverage and leisure/cultural uses, with some vacant shop premises also converting to these uses. Not all vacant shop units will be suitable for conversion to leisure/cultural uses, therefore new development may be required to accommodate new uses.

7.29 The high growth projections suggest up to 5,991 sq.m gross could be required by 2035. Vacant shop units could accommodate about half of this requirement.

7.30 The baseline floorspace projections suggest there is no need to identify development site allocations to accommodate new floorspace. In many cases there is a negative floorspace projection which may lead to an increase in vacant shop units. The requirement for new food/beverage uses could be accommodated in vacant shop units.

Retail hierarchy, boundaries and frontages

7.31 Based on Lichfields review of existing planning policies and site visits to the local centres, the Council could consider one or a combination of the following:

1 There is no need to allocate major sites for new retail floorspace due to the low growth projections. The requirement for new food/beverage uses could be accommodated in vacant shop units.

2 The introduction of a three/four-tiered retail hierarchy as follows:

(e) Caerphilly, Blackwood and Bargoed;

(f) Ystrad Mynach, Risca/Pontymister and Newbridge;

(g) Bedwas, Rhymney and Nelson;

and potentially

(h) Retail Warehouse Parks (Blackwood Gate and Gallagher).

3 As the retail areas within the designated Local Centres are well established and their boundaries could be formalised within the replacement Local Development Plan.

4 There may be scope to remove a cluster of potentially long-term vacant units towards the periphery of the southern boundary of Caerphilly Principal Town Centre (off Cardiff Road) and the northern boundary of Bargoed Principal Town Centre (Hanbury Road and High Street) from the existing centre boundaries. This will ensure they do not undermine the viability and vitality of these centres and to allow them to change to a different use.

5 Potential amendments to policy CW14 to allow more flexibility in terms of the uses that may be acceptable in the designated centres, moving towards a criterion based policy based on the impact on the vitality and viability of the centres.

6 Amendments to Policy CW16 for consistency with national planning policy.

7 Ensuring planning policies are in accordance with national planning policy as well as Future Wales 2040, which is part of the development plan.

Future Monitoring

7.32 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail, F&B and leisure development in the short, medium and longer term forecast up to 2035. Projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available, in particular longer-term projections should be treated with caution.

7.33 Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

1 population projections;

2 local expenditure estimates (information from Experian or other recognised data providers);

3 growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);

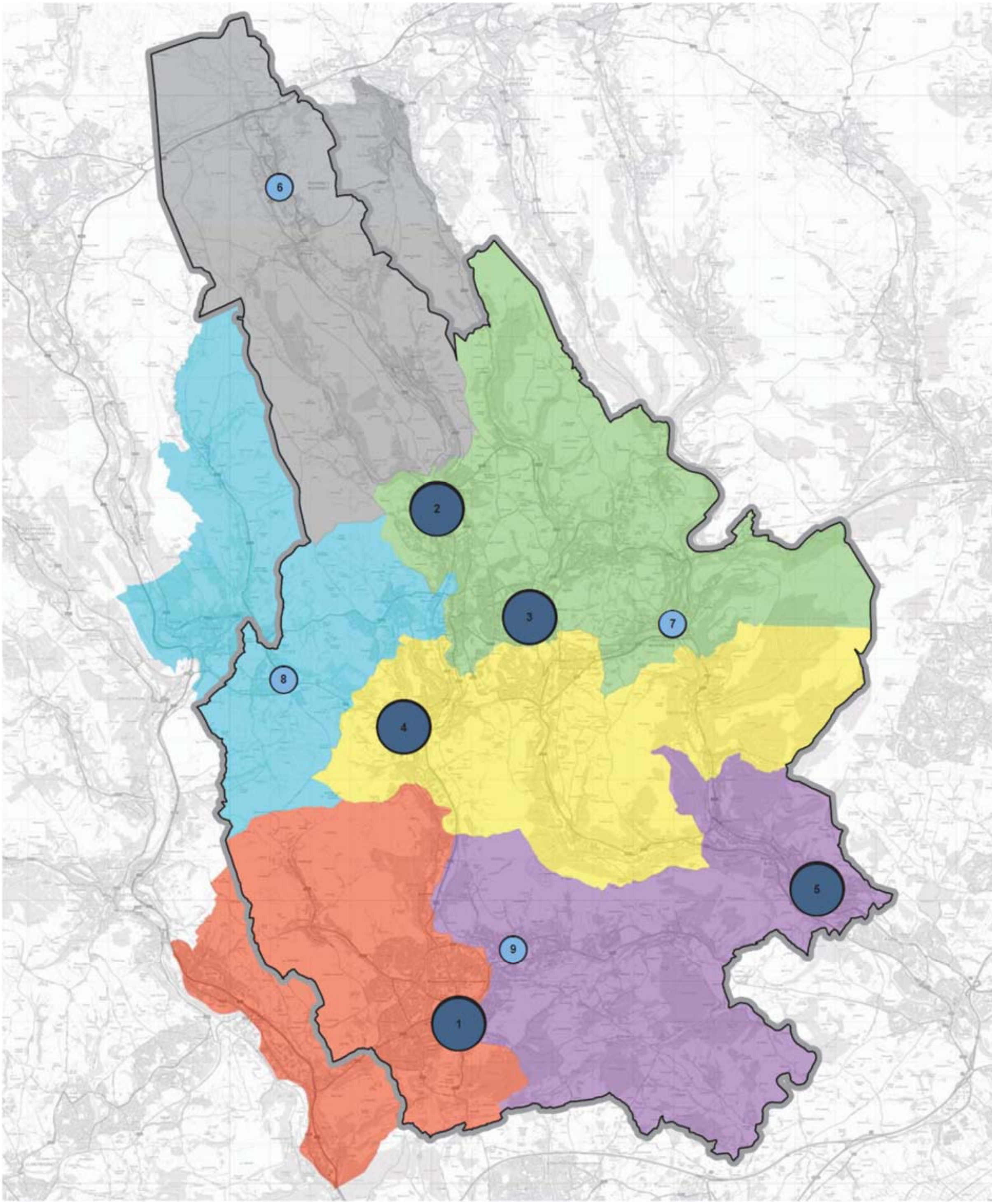
4 the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);

5 existing retail floorspace and average turnover to floorspace densities; and

6 implemented development within and around the study area.

7.34 These key inputs into the retail capacity assessment can be amended to provide revised capacity projections as and when required.

Appendix 1 : Study area/centre network


6
2
3
7
8
4
5
9
1


Key
Caerphilly Local Authority Boundary
Zone 1
Zone 2
Zone 3
Zone 4
Zone 5
Zone 6
Principal Town Centre
1. Caerphilly
2. Bargoed
3. Blackwood
4. Ystrad Mynach
5. Risca/Pontymister
Local Centre
6. Rhymney
7. Newbridge
8. Nelson
9. Bedwas

Appendix 2 : Convenience assessment

Table 1A - Study area population projections - baseline growth

Zone	2022	2025	2030	2035
1 - Caerphilly	53,014	53,224	53,542	53,928
2 - Risca/Pontymister/Bedwas	32,172	32,150	32,170	32,199
3 - Nelson	22,809	22,958	23,098	23,212
4 - Ystrad Mynach	32,276	32,419	32,452	32,543
5 - Bargoed/Blackwood	50,241	50,358	50,408	50,533
6 - Rhymney	22,915	22,945	22,898	22,935
Total	**213,427**	**214,054**	**214,568**	**215,350**

Sources: Experian MMG3 population projections

Table 1B - Study area population projections - high growth

Zone	2022	2025	2030	2035
1 - Caerphilly	53,014	54,055	55,791	57,527
2 - Risca/Pontymister/Bedwas	32,172	32,203	32,254	32,305
3 - Nelson	22,809	23,268	24,034	24,799
4 - Ystrad Mynach	32,276	32,580	33,088	33,595
5 - Bargoed/Blackwood	50,241	50,574	51,128	51,683
6 - Rhymney	22,915	22,938	22,976	23,014
Total	**213,427**	**215,618**	**219,271**	**222,923**

Sources: Caerphilly CBC - Population and Housing Preferred Growth option

Table 2 - Convenience goods expenditure per person per annum (£)

Zone	2022	2025	2030	2035
1 - Caerphilly	2,172	2,160	2,157	2,161
2 - Risca/Pontymister/Bedwas	2,235	2,222	2,219	2,223
3 - Nelson	2,129	2,117	2,114	2,118
4 - Ystrad Mynach	2,118	2,106	2,103	2,107
5 - Bargoed/Blackwood	2,140	2,129	2,125	2,129
6 - Rhymney	2,038	2,027	2,024	2,027

Sources: *Experian Local Expenditure 2020 (2020 prices)*
Experian growth rates - Retail Planner Breifing Note 19 (January 2022)
Excludes Special Forms of Trading (SFT)

Table 3 - Total convenience goods expenditure (£m)

Zone	2022	2025	2030	2035
1 - Caerphilly	115.15	114.96	115.49	116.54
2 - Risca/Pontymister/Bedwas	71.90	71.44	71.39	71.58
3 - Nelson	48.56	48.60	48.83	49.16
4 - Ystrad Mynach	68.36	68.27	68.25	68.57
5 - Bargoed/Blackwood	107.52	107.21	107.12	107.58
6 - Rhymney	46.70	46.51	46.35	46.49
Total	**458.19**	**457.00**	**457.41**	**459.92**

Source: Tables 1 and 2

Table 4 - Base year 2022 convenience goods market shares by zone (%)

Zone/Location	1	2	3	4	5	6	Inflow
Zone 1							
Caerphilly	88.2%	43.1%	3.4%	2.2%	1.3%	0.8%	10.0%
Other Zone 1	1.5%	0.0%	0.0%	0.2%	0.3%	0.0%	5.0%
Sub-total	**89.7%**	**43.1%**	**3.4%**	**2.4%**	**1.6%**	**0.8%**	
Zone 2							
Risca/Pontymister	0.0%	42.2%	0.0%	10.2%	3.5%	0.0%	45.0%
Other Zone 2	0.0%	1.5%	0.0%	0.3%	0.0%	0.0%	5.0%
Sub-total	**0.0%**	**43.7%**	**0.0%**	**10.5%**	**3.5%**	**0.0%**	
Zone 3							
Nelson	0.0%	0.0%	12.2%	0.1%	0.5%	0.3%	5.0%
Other Zone 3	0.0%	0.0%	0.6%	0.1%	0.0%	0.0%	5.0%
Sub-total	**0.0%**	**0.0%**	**12.8%**	**0.2%**	**0.5%**	**0.3%**	
Zone 4							
Ystrad Mynach	0.6%	0.2%	38.6%	33.8%	7.9%	4.0%	5.0%
Other Zone 4	0.0%	0.0%	0.5%	2.8%	2.1%	0.0%	5.0%
Sub-total	**0.6%**	**0.2%**	**39.1%**	**36.6%**	**10.0%**	**4.0%**	
Zone 5							
Bargoed	0.0%	0.2%	4.2%	3.8%	16.4%	17.8%	5.0%
Blackwood	1.0%	0.1%	10.2%	38.6%	55.8%	6.2%	5.0%
Other Zone 5	0.0%	0.0%	0.4%	0.4%	4.1%	0.0%	5.0%
Sub-total	**1.0%**	**0.3%**	**14.8%**	**42.8%**	**76.3%**	**24.0%**	
Zone 6							
Rhymney	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	5.0%
Other Zone 6	0.0%	0.0%	0.0%	0.1%	0.0%	3.7%	5.0%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.1%**	**0.0%**	**7.0%**	
Caerphilly CB total	**91.3%**	**87.3%**	**70.1%**	**92.6%**	**91.9%**	**36.1%**	
Outside Caerphilly CB							
Cardiff	5.6%	3.4%	1.7%	0.0%	1.0%	0.0%	n/a
Ebbw Vale/Brynmawr	0.2%	0.0%	0.0%	0.0%	0.1%	13.2%	n/a
Merthyr Tydfil	0.0%	0.0%	10.6%	0.5%	0.5%	40.5%	n/a
Newport/Rogerstone	0.2%	7.5%	0.0%	2.7%	1.4%	0.0%	n/a
Pontypridd	2.5%	1.0%	4.7%	2.1%	1.8%	0.2%	n/a
Other	0.2%	0.8%	12.9%	2.1%	3.3%	10.0%	n/a
Sub-total	**8.7%**	**12.7%**	**29.9%**	**7.4%**	**8.1%**	**63.9%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey April 2022 and Lichfields' analysis.

Table 5 - Base year 2022 convenience goods expendiiture patterns by zone (£M)

Zone/loclation	1	2	3	4	5	6		Total
Expenditure 2022	115.15	71.90	48.56	68.36	107.52	46.70		**458.19**
Zone 1								
Caerphilly	101.56	30.99	1.65	1.50	1.40	0.37	15.28	152.75
Other Zone 1	1.73	0.00	0.00	0.14	0.32	0.00	0.12	2.30
Sub-total	**103.29**	**30.99**	**1.65**	**1.64**	**1.72**	**0.37**	**15.39**	**155.05**
Zone 2								
Risca/Pontymister	0.00	30.34	0.00	6.97	3.76	0.00	33.61	74.69
Other Zone 2	0.00	1.08	0.00	0.21	0.00	0.00	0.07	1.35
Sub-total	**0.00**	**31.42**	**0.00**	**7.18**	**3.76**	**0.00**	**33.68**	**76.04**
Zone 3								
Nelson	0.00	0.00	5.92	0.07	0.54	0.14	0.35	7.02
Other Zone 3	0.00	0.00	0.29	0.07	0.00	0.00	0.02	0.38
Sub-total	**0.00**	**0.00**	**6.22**	**0.14**	**0.54**	**0.14**	**0.37**	**7.40**
Zone 4								
Ystrad Mynach	0.69	0.14	18.74	23.11	8.49	1.87	2.79	55.84
Other Zone 4	0.00	0.00	0.24	1.91	2.26	0.00	0.23	4.65
Sub-total	**0.69**	**0.14**	**18.99**	**25.02**	**10.75**	**1.87**	**3.02**	**60.49**
Zone 5								
Bargoed	0.00	0.14	2.04	2.60	17.63	8.31	1.62	32.34
Blackwood	1.15	0.07	4.95	26.39	59.99	2.90	5.02	100.48
Other Zone 5	0.00	0.00	0.19	0.27	4.41	0.00	0.26	5.13
Sub-total	**1.15**	**0.22**	**7.19**	**29.26**	**82.03**	**11.21**	**6.90**	**137.95**
Zone 6								
Rhymney	0.00	0.00	0.00	0.00	0.00	1.54	0.08	1.62
Other Zone 6	0.00	0.00	0.00	0.07	0.00	1.73	0.09	1.89
Sub-total	**0.00**	**0.00**	**0.00**	**0.07**	**0.00**	**3.27**	**0.18**	**3.51**
Caerphilly CB total	**105.13**	**62.77**	**34.04**	**63.30**	**98.81**	**16.86**	**59.54**	**440.45**
Outside Caerphilly CB								
Cardiff	6.45	2.44	0.83	0.00	1.08	0.00	n/a	10.79
Ebbw Vale/Brynmawr	0.23	0.00	0.00	0.00	0.11	6.16	n/a	6.50
Merthyr Tydfil	0.00	0.00	5.15	0.34	0.54	18.91	n/a	24.94
Newport/Rogerstone	0.23	5.39	0.00	1.85	1.51	0.00	n/a	8.97
Pontypridd	2.88	0.72	2.28	1.44	1.94	0.09	n/a	9.34
Other	0.23	0.58	6.26	1.44	3.55	4.67	n/a	16.72
Sub-total	**10.02**	**9.13**	**14.52**	**5.06**	**8.71**	**29.84**	n/a	**77.28**
TOTAL	**115.15**	**71.90**	**48.56**	**68.36**	**107.52**	**46.70**	n/a	**517.72**

Source: Tables 3 and 4

Table 6 - Future 2025 convenience goods expendiiture patterns by zone (£M)

Zone/loclation	1	2	3	4	5	6		Total
Expenditure 2025	114.96	71.44	48.60	68.27	107.21	46.51		**457.00**
Zone 1								
Caerphilly	101.40	30.79	1.65	1.50	1.39	0.37	15.23	152.34
Other Zone 1	1.72	0.00	0.00	0.14	0.32	0.00	0.11	2.30
Sub-total	**103.12**	**30.79**	**1.65**	**1.64**	**1.72**	**0.37**	**15.35**	**154.64**
Zone 2								
Risca/Pontymister	0.00	30.15	0.00	6.96	3.75	0.00	33.43	74.30
Other Zone 2	0.00	1.07	0.00	0.20	0.00	0.00	0.07	1.34
Sub-total	**0.00**	**31.22**	**0.00**	**7.17**	**3.75**	**0.00**	**33.50**	**75.64**
Zone 3								
Nelson	0.00	0.00	5.93	0.07	0.54	0.14	0.35	7.02
Other Zone 3	0.00	0.00	0.29	0.07	0.00	0.00	0.02	0.38
Sub-total	**0.00**	**0.00**	**6.22**	**0.14**	**0.54**	**0.14**	**0.37**	**7.40**
Zone 4								
Ystrad Mynach	0.69	0.14	18.76	23.08	8.47	1.86	2.79	55.79
Other Zone 4	0.00	0.00	0.24	1.91	2.25	0.00	0.23	4.64
Sub-total	**0.69**	**0.14**	**19.00**	**24.99**	**10.72**	**1.86**	**3.02**	**60.43**
Zone 5								
Bargoed	0.00	0.14	2.04	2.59	17.58	8.28	1.61	32.25
Blackwood	1.15	0.07	4.96	26.35	59.82	2.88	5.01	100.25
Other Zone 5	0.00	0.00	0.19	0.27	4.40	0.00	0.26	5.12
Sub-total	**1.15**	**0.21**	**7.19**	**29.22**	**81.80**	**11.16**	**6.88**	**137.62**
Zone 6								
Rhymney	0.00	0.00	0.00	0.00	0.00	1.53	0.08	1.62
Other Zone 6	0.00	0.00	0.00	0.07	0.00	1.72	0.09	1.88
Sub-total	**0.00**	**0.00**	**0.00**	**0.07**	**0.00**	**3.26**	**0.17**	**3.50**
Caerphilly CB total	**104.96**	**62.36**	**34.07**	**63.22**	**98.53**	**16.79**	**59.30**	**439.23**
Outside Caerphilly CB								
Cardiff	6.44	2.43	0.83	0.00	1.07	0.00	n/a	10.77
Ebbw Vale/Brynmawr	0.23	0.00	0.00	0.00	0.11	6.14	n/a	6.48
Merthyr Tydfil	0.00	0.00	5.15	0.34	0.54	18.84	n/a	24.87
Newport/Rogerstone	0.23	5.36	0.00	1.84	1.50	0.00	n/a	8.93
Pontypridd	2.87	0.71	2.28	1.43	1.93	0.09	n/a	9.33
Other	0.23	0.57	6.27	1.43	3.54	4.65	n/a	16.69
Sub-total	**10.00**	**9.07**	**14.53**	**5.05**	**8.68**	**29.72**	n/a	**77.06**
TOTAL	**114.96**	**71.44**	**48.60**	**68.27**	**107.21**	**46.51**	n/a	**516.30**

Source: Tables 3 and 4

Table 7 - Future 2030 convenience goods expendiiture patterns by zone (£M)

Zone/loclation	1	2	3	4	5	6		Total
Expenditure 2030	115.49	71.39	48.83	68.25	107.12	46.35		**457.41**
Zone 1								
Caerphilly	101.86	30.77	1.66	1.50	1.39	0.37	15.28	152.84
Other Zone 1	1.73	0.00	0.00	0.14	0.32	0.00	0.12	2.31
Sub-total	**103.59**	**30.77**	**1.66**	**1.64**	**1.71**	**0.37**	**15.40**	**155.14**
Zone 2								
Risca/Pontymister	0.00	30.12	0.00	6.96	3.75	0.00	33.41	74.25
Other Zone 2	0.00	1.07	0.00	0.20	0.00	0.00	0.07	1.34
Sub-total	**0.00**	**31.20**	**0.00**	**7.17**	**3.75**	**0.00**	**33.48**	**75.59**
Zone 3								
Nelson	0.00	0.00	5.96	0.07	0.54	0.14	0.35	7.05
Other Zone 3	0.00	0.00	0.29	0.07	0.00	0.00	0.02	0.38
Sub-total	**0.00**	**0.00**	**6.25**	**0.14**	**0.54**	**0.14**	**0.37**	**7.43**
Zone 4								
Ystrad Mynach	0.69	0.14	18.85	23.07	8.46	1.85	2.79	55.86
Other Zone 4	0.00	0.00	0.24	1.91	2.25	0.00	0.23	4.64
Sub-total	**0.69**	**0.14**	**19.09**	**24.98**	**10.71**	**1.85**	**3.02**	**60.50**
Zone 5								
Bargoed	0.00	0.14	2.05	2.59	17.57	8.25	1.61	32.21
Blackwood	1.15	0.07	4.98	26.34	59.77	2.87	5.01	100.20
Other Zone 5	0.00	0.00	0.20	0.27	4.39	0.00	0.26	5.12
Sub-total	**1.15**	**0.21**	**7.23**	**29.21**	**81.73**	**11.12**	**6.88**	**137.54**
Zone 6								
Rhymney	0.00	0.00	0.00	0.00	0.00	1.53	0.08	1.61
Other Zone 6	0.00	0.00	0.00	0.07	0.00	1.71	0.09	1.88
Sub-total	**0.00**	**0.00**	**0.00**	**0.07**	**0.00**	**3.24**	**0.17**	**3.49**
Caerphilly CB total	**105.44**	**62.32**	**34.23**	**63.20**	**98.44**	**16.73**	**59.32**	**439.68**
Outside Caerphilly CB								
Cardiff	6.47	2.43	0.83	0.00	1.07	0.00	n/a	10.80
Ebbw Vale/Brynmawr	0.23	0.00	0.00	0.00	0.11	6.12	n/a	6.46
Merthyr Tydfil	0.00	0.00	5.18	0.34	0.54	18.77	n/a	24.82
Newport/Rogerstone	0.23	5.35	0.00	1.84	1.50	0.00	n/a	8.93
Pontypridd	2.89	0.71	2.29	1.43	1.93	0.09	n/a	9.35
Other	0.23	0.57	6.30	1.43	3.53	4.63	n/a	16.70
Sub-total	**10.05**	**9.07**	**14.60**	**5.05**	**8.68**	**29.61**	n/a	**77.06**
TOTAL	**115.49**	**71.39**	**48.83**	**68.25**	**107.12**	**46.35**	n/a	**516.74**

Source: Tables 3 and 4

Table 8 - Future 2035 convenience goods expendiiture patterns by zone (£M)

Zone/loclation	1	2	3	4	5	6		Total
Expenditure 2035	116.54	71.58	49.16	68.57	107.58	46.49		**459.92**
Zone 1								
Caerphilly	102.79	30.85	1.67	1.51	1.40	0.37	15.40	153.99
Other Zone 1	1.75	0.00	0.00	0.14	0.32	0.00	0.12	2.32
Sub-total	**104.53**	**30.85**	**1.67**	**1.65**	**1.72**	**0.37**	**15.51**	**156.31**
Zone 2								
Risca/Pontymister	0.00	30.21	0.00	6.99	3.77	0.00	33.52	74.48
Other Zone 2	0.00	1.07	0.00	0.21	0.00	0.00	0.07	1.35
Sub-total	**0.00**	**31.28**	**0.00**	**7.20**	**3.77**	**0.00**	**33.58**	**75.83**
Zone 3								
Nelson	0.00	0.00	6.00	0.07	0.54	0.14	0.35	7.10
Other Zone 3	0.00	0.00	0.29	0.07	0.00	0.00	0.02	0.38
Sub-total	**0.00**	**0.00**	**6.29**	**0.14**	**0.54**	**0.14**	**0.37**	**7.48**
Zone 4								
Ystrad Mynach	0.70	0.14	18.98	23.18	8.50	1.86	2.81	56.16
Other Zone 4	0.00	0.00	0.25	1.92	2.26	0.00	0.23	4.66
Sub-total	**0.70**	**0.14**	**19.22**	**25.10**	**10.76**	**1.86**	**3.04**	**60.82**
Zone 5								
Bargoed	0.00	0.14	2.06	2.61	17.64	8.28	1.62	32.35
Blackwood	1.17	0.07	5.01	26.47	60.03	2.88	5.03	100.67
Other Zone 5	0.00	0.00	0.20	0.27	4.41	0.00	0.26	5.14
Sub-total	**1.17**	**0.21**	**7.28**	**29.35**	**82.09**	**11.16**	**6.91**	**138.16**
Zone 6								
Rhymney	0.00	0.00	0.00	0.00	0.00	1.53	0.08	1.61
Other Zone 6	0.00	0.00	0.00	0.07	0.00	1.72	0.09	1.88
Sub-total	**0.00**	**0.00**	**0.00**	**0.07**	**0.00**	**3.25**	**0.17**	**3.50**
Caerphilly CB total	**106.40**	**62.49**	**34.46**	**63.49**	**98.87**	**16.78**	**59.60**	**442.09**
Outside Caerphilly CB								
Cardiff	6.53	2.43	0.84	0.00	1.08	0.00	n/a	10.87
Ebbw Vale/Brynmawr	0.23	0.00	0.00	0.00	0.11	6.14	n/a	6.48
Merthyr Tydfil	0.00	0.00	5.21	0.34	0.54	18.83	n/a	24.92
Newport/Rogerstone	0.23	5.37	0.00	1.85	1.51	0.00	n/a	8.96
Pontypridd	2.91	0.72	2.31	1.44	1.94	0.09	n/a	9.41
Other	0.23	0.57	6.34	1.44	3.55	4.65	n/a	16.79
Sub-total	**10.14**	**9.09**	**14.70**	**5.07**	**8.71**	**29.71**	n/a	**77.42**
TOTAL	**116.54**	**71.58**	**49.16**	**68.57**	**107.58**	**46.49**	n/a	**519.52**

Source: Tables 3 and 4

Table 9 - Convenience goods floorspace and benchmark turnover of main food store in Caerphilly County Borough

Zone / Store	Sales floorspace (sq.m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq.m net)	Turnover (£ per sq.m)	Total turnover (£m)
Zone 1 - Caerphilly					
Aldi, Gallagher Retail Park, Caerphilly	1,086	85%	923	£11,020	£10.17
Asda, Pontygwindy Road, Caerphilly	4,353	70%	3,047	£14,298	£43.57
B&M Bargains, Bedwas Road, Caerphilly	1,123	30%	337	£2,319	£0.78
Co-op, Church Street, Caerphilly	194	95%	184	£10,990	£2.03
Co-op, Commercial Road, Machen, Caerphilly	193	95%	183	£10,990	£2.02
Heron, Castle Court Shopping Centre, Caerphilly	303	95%	288	£5,059	£1.46
Home Bargains, Pontygwindy Road, Caerphilly	1,021	30%	306	£5,272	£1.61
Iceland, Cardiff Road, Caerphilly	458	95%	435	£7,447	£3.24
Lidl, Beddau Way, off Nantgarw Road, Caerphilly	1,241	80%	993	£8,741	£8.68
Morrisons, Castle Court, Caerphilly	2,744	90%	2,470	£12,944	£31.97
Tesco Express, Brynhyfryd Road, Caerphilly	332	95%	315	£14,075	£4.44
Tesco Express, Castle View, Caerphilly	218	95%	207	£14,075	£2.91
Tesco Express, Riverbank Newport Road, Caerphilly	380	95%	361	£14,075	£5.08
Tesco, Gallagher Retail Park, Caerphilly	1,880	90%	1,692	£14,075	£23.81
Other Caerphilly	500	100%	500	£6,000	£3.00
Sub Total	**16,026**		**12,242**		**£144.77**
Zone 2 - Risca/Pontymister					
Tesco Extra, Pontymister industrial estate	6,274	60%	3,764	£14,075	£52.98
Aldi, Pontymister industrial estate	1,058	85%	899	£11,020	£9.91
Lidl, Commercial Street, Risca	1,017	85%	864	£8,741	£7.56
Premier, Risca	215	95%	204	£7,000	£1.43
One Stop, Risca	223	95%	212	£9,067	£1.92
Other Risca	200	100%	200	£6,000	£1.20
Sub-Total	**8,987**		**6,144**		**£75.00**
Zone 3 - Nelson					
Co-op, Commercial Street, Nelson	193	95%	183	£10,990	£2.02
Co-op, Mafon Road, Nelson	723	90%	651	£10,990	£7.15
Sub-Total	**916**		**834**		**£9.17**
Zone 4 - Ystrad Mynach/Hengoed					
Aldi, New Road, Hengoed	961	85%	817	£11,020	£9.00
Lidl, Pengam Road, Hengoed	1,126	80%	901	£8,741	£7.87
Tesco, New Road, Hengoed	3,913	75%	2,935	£14,075	£41.31
Other Ystrad Mynach	250	100%	250	£6,000	£1.50
Sub-Total	**6,250**		**4,652**		**£59.68**
Zone 5 - Bargoed/Blackwood					
Aldi, Blackwood Gate Retail Park, Blackwood	864	85%	734	£11,020	£8.09
Asda, Blackwood Retail Park, Blackwood	4,484	70%	3,139	£14,298	£44.88
B&M Bargains, Cliff Road, Blackwood	784	30%	235	£2,319	£0.55
Co-op, Central Buildings, Blackwood	154	95%	146	£10,990	£1.61
Farmfoods, Blackwood Retail Park, Blackwood	263	95%	250	£7,000	£1.75
Home Bargains, Blackwood Retail Park, Blackwood	1,299	30%	390	£5,272	£2.05
Iceland, Hanbury Road, Bargoed	193	95%	183	£7,447	£1.37
Iceland, Islwyn Centre, Blackwood	437	95%	415	£7,447	£3.09
Morrisons, Bargoed Gateway, Bargoed	3,223	80%	2,578	£12,944	£33.37
Sainsbury's, Newbridge industrial Estate, Blackwood	4,032	75%	3,024	£12,482	£37.75
Tesco Express, Highfield Way, Blackwood	160	95%	152	£14,075	£2.14
Other Bargoed	200	95%	190	£6,000	£1.14
Other Blackwood	200	95%	190	£6,000	£1.14
Sub-Total	**16,293**		**11,627**		**£138.93**
Zone 6 - Rhymney					
Premier, Rhymney	100	95%	95	£10,000	£0.95
Other Rhymney	150	100%	150	£6,000	£0.90
Sub Total	**250**		**245**		**£1.85**
	48,722		**35,745**	**£12,013**	**£429.39**

Source: *ORC Storepoint 2022, VOA, GlobalData and Lichfields' estimates*

Table 10A - Convenience goods expenditure 2022 to 2035 (£M) - baseline growth

	2022	2025	2030	2035
Available expenditure				
Zone 1 - Caerphilly	152.75	152.34	152.84	153.99
Zone 1 - other	2.30	2.30	2.31	2.32
Zone 2 - Risca/Pontymister	74.69	74.30	74.25	74.48
Zone 2 - other	1.35	1.34	1.34	1.35
Zone 3 - Nelson	7.02	7.02	7.05	7.10
Zone 3 - other	0.38	0.38	0.38	0.38
Zone 4 - Ystrad Mynach	55.84	55.79	55.86	56.16
Zone 4 - other	4.65	4.64	4.64	4.66
Zone 5 - Bargoed/Blackwood	132.82	132.51	132.42	133.02
Zone 5 - other	5.13	5.12	5.12	5.14
Zone 6 - Rhymney	1.62	1.62	1.61	1.61
Zone 6 - other	1.89	1.88	1.88	1.88
Total	**440.45**	**439.23**	**439.68**	**442.09**
Turnover of existing facilities				
Zone 1 - Caerphilly	144.77	147.38	147.82	147.82
Zone 1 - other	2.30	2.34	2.35	2.35
Zone 2 - Risca/Pontymister	75.00	76.35	76.58	76.58
Zone 2 - other	1.35	1.38	1.38	1.38
Zone 3 - Nelson	9.17	9.33	9.36	9.36
Zone 3 - other	0.38	0.39	0.39	0.39
Zone 4 - Ystrad Mynach	59.68	60.76	60.94	60.94
Zone 4 - other	4.65	4.73	4.75	4.75
Zone 5 - Bargoed/Blackwood	138.93	141.43	141.86	141.86
Zone 5 - other	5.13	5.23	5.24	5.24
Zone 6 - Rhymney	1.85	1.88	1.89	1.89
Zone 6 - other	1.89	1.92	1.93	1.93
Total	**445.09**	**453.12**	**454.48**	**454.48**
Surplus/deficit expenditure £M				
Zone 1 - Caerphilly	7.98	4.96	5.02	6.17
Zone 1 - other	0.00	-0.05	-0.04	-0.03
Zone 2 - Risca/Pontymister	-0.31	-2.06	-2.34	-2.10
Zone 2 - other	0.00	-0.03	-0.04	-0.03
Zone 3 - Nelson	-2.14	-2.31	-2.31	-2.26
Zone 3 - other	0.00	-0.01	-0.01	0.00
Zone 4 - Ystrad Mynach	-3.84	-4.97	-5.08	-4.78
Zone 4 - other	0.00	-0.09	-0.11	-0.09
Zone 5 - Bargoed/Blackwood	-6.10	-8.92	-9.44	-8.84
Zone 5 - other	0.00	-0.11	-0.12	-0.10
Zone 6 - Rhymney	-0.23	-0.27	-0.28	-0.27
Zone 6 - other	0.00	-0.04	-0.05	-0.05
Total	**-4.65**	**-13.89**	**-14.80**	**-12.39**

Source: Tables 5 to 9

Table 10B - Convenience goods expenditure 2022 to 2035 (£M) - High growth

	2022	2025	2030	2035
Available expenditure				
Zone 1 - Caerphilly	152.75	154.20	157.81	161.94
Zone 1 - other	2.30	2.33	2.39	2.46
Zone 2 - Risca/Pontymister	74.69	74.48	74.73	75.23
Zone 2 - other	1.35	1.35	1.35	1.36
Zone 3 - Nelson	7.02	7.11	7.32	7.55
Zone 3 - other	0.38	0.38	0.39	0.41
Zone 4 - Ystrad Mynach	55.84	56.23	57.30	58.58
Zone 4 - other	4.65	4.66	4.72	4.80
Zone 5 - Bargoed/Blackwood	132.82	133.12	134.57	136.50
Zone 5 - other	5.13	5.14	5.20	5.27
Zone 6 - Rhymney	1.62	1.62	1.62	1.62
Zone 6 - other	1.89	1.88	1.88	1.89
Total	**440.45**	**442.50**	**449.29**	**457.59**
Turnover of existing facilities				
Zone 1 - Caerphilly	144.77	147.38	147.82	147.82
Zone 1 - other	2.30	2.34	2.35	2.35
Zone 2 - Risca/Pontymister	75.00	76.35	76.58	76.58
Zone 2 - other	1.35	1.38	1.38	1.38
Zone 3 - Nelson	9.17	9.33	9.36	9.36
Zone 3 - other	0.38	0.39	0.39	0.39
Zone 4 - Ystrad Mynach	59.68	60.76	60.94	60.94
Zone 4 - other	4.65	4.73	4.75	4.75
Zone 5 - Bargoed/Blackwood	138.93	141.43	141.86	141.86
Zone 5 - other	5.13	5.23	5.24	5.24
Zone 6 - Rhymney	1.85	1.88	1.89	1.89
Zone 6 - other	1.89	1.92	1.93	1.93
Total	**445.09**	**453.12**	**454.48**	**454.48**
Surplus/deficit expenditure £M				
Zone 1 - Caerphilly	7.98	6.82	9.99	14.12
Zone 1 - other	0.00	-0.02	0.04	0.11
Zone 2 - Risca/Pontymister	-0.31	-1.88	-1.85	-1.35
Zone 2 - other	0.00	-0.03	-0.03	-0.02
Zone 3 - Nelson	-2.14	-2.22	-2.04	-1.81
Zone 3 - other	0.00	0.00	0.01	0.02
Zone 4 - Ystrad Mynach	-3.84	-4.53	-3.64	-2.36
Zone 4 - other	0.00	-0.07	-0.03	0.05
Zone 5 - Bargoed/Blackwood	-6.10	-8.31	-7.28	-5.36
Zone 5 - other	0.00	-0.08	-0.04	0.03
Zone 6 - Rhymney	-0.23	-0.27	-0.27	-0.27
Zone 6 - other	0.00	-0.04	-0.05	-0.04
Total	**-4.65**	**-10.62**	**-5.19**	**3.11**

Table 11A - Convenience goods floorspace capacity up to 2035 (cumulative) - Baseline growth

	2022	2025	2030	2035
Turnover density new floorspace (£ per sq.m)	£12,000	£12,216	£12,253	£12,253
Floorspace projection (sq.m net)				
Zone 1 - Caerphilly	665	406	409	503
Zone 1 - other	0	-4	-4	-2
Zone 2 - Risca/Pontymister	-26	-168	-191	-171
Zone 2 - other	0	-3	-3	-3
Zone 3 - Nelson	-179	-189	-188	-185
Zone 3 - other	0	-1	-1	0
Zone 4 - Ystrad Mynach	-320	-407	-415	-390
Zone 4 - other	0	-8	-9	-7
Zone 5 - Bargoed/Blackwood	-509	-731	-770	-721
Zone 5 - other	0	-9	-10	-8
Zone 6 - Rhymney	-19	-22	-23	-22
Zone 6 - other	0	-3	-4	-4
Total	**-387**	**-1,137**	**-1,208**	**-1,011**
Floorspace Projection (sq.m gross)				
Zone 1 - Caerphilly	950	580	585	719
Zone 1 - other	0	-5	-5	-3
Zone 2 - Risca/Pontymister	-37	-241	-273	-245
Zone 2 - other	0	-4	-4	-4
Zone 3 - Nelson	-255	-270	-269	-264
Zone 3 - other	0	-1	-1	0
Zone 4 - Ystrad Mynach	-458	-581	-592	-557
Zone 4 - other	0	-11	-13	-10
Zone 5 - Bargoed/Blackwood	-727	-1,044	-1,100	-1,030
Zone 5 - other	0	-12	-15	-12
Zone 6 - Rhymney	-27	-31	-33	-32
Zone 6 - other	0	-5	-6	-6
Total	**-553**	**-1,624**	**-1,725**	**-1,444**

Source: Table 10A

Table 11B - Convenience goods floorspace capacity up to 2035 (cumulative) - High growth

	2022	2025	2030	2035
Turnover density new floorspace (£ per sq.m)	£12,000	£12,216	£12,253	£12,253
Floorspace projection (sq.m net)				
Zone 1 - Caerphilly	665	558	815	1,152
Zone 1 - other	0	-1	3	9
Zone 2 - Risca/Pontymister	-26	-153	-151	-110
Zone 2 - other	0	-2	-2	-2
Zone 3 - Nelson	-179	-182	-167	-148
Zone 3 - other	0	0	1	2
Zone 4 - Ystrad Mynach	-320	-371	-297	-193
Zone 4 - other	0	-6	-2	4
Zone 5 - Bargoed/Blackwood	-509	-680	-594	-437
Zone 5 - other	0	-7	-4	2
Zone 6 - Rhymney	-19	-22	-22	-22
Zone 6 - other	0	-3	-4	-3
Total	**-387**	**-870**	**-424**	**254**
Floorspace Projection (sq.m gross)				
Zone 1 - Caerphilly	950	797	1,165	1,646
Zone 1 - other	0	-2	5	13
Zone 2 - Risca/Pontymister	-37	-219	-216	-158
Zone 2 - other	0	-3	-3	-3
Zone 3 - Nelson	-255	-260	-238	-211
Zone 3 - other	0	0	1	2
Zone 4 - Ystrad Mynach	-458	-530	-424	-276
Zone 4 - other	0	-8	-3	6
Zone 5 - Bargoed/Blackwood	-727	-972	-849	-624
Zone 5 - other	0	-10	-5	3
Zone 6 - Rhymney	-27	-31	-32	-31
Zone 6 - other	0	-5	-5	-5
Total	**-553**	**-1,242**	**-606**	**362**

Source: Table 10B

Appendix 3 : Comparison assessment

Table 1A - Study area population projections - baseline growth

Zone	2022	2025	2030	2035
1 - Caerphilly	53,014	53,224	53,542	53,928
2 - Risca/Pontymister/Bedwas	32,172	32,150	32,170	32,199
3 - Nelson	22,809	22,958	23,098	23,212
4 - Ystrad Mynach	32,276	32,419	32,452	32,543
5 - Bargoed/Blackwood	50,241	50,358	50,408	50,533
6 - Rhymney	22,915	22,945	22,898	22,935
Total	**213,427**	**214,054**	**214,568**	**215,350**

Sources: Experian MMG3 population projections

Table 1B - Study area population projections - high growth

Zone	2022	2025	2030	2035
1 - Caerphilly	53,014	54,055	55,791	57,527
2 - Risca/Pontymister/Bedwas	32,172	32,203	32,254	32,305
3 - Nelson	22,809	23,268	24,034	24,799
4 - Ystrad Mynach	32,276	32,580	33,088	33,595
5 - Bargoed/Blackwood	50,241	50,574	51,128	51,683
6 - Rhymney	22,915	22,938	22,976	23,014
Total	**213,427**	**215,618**	**219,271**	**222,923**

Sources: Caerphilly CBC - Population and Housing Preferred Growth option

Table 2 - Comparison goods expenditure per person per annum (£)

Zone	2022	2025	2030	2035
1 - Caerphilly	2,815	2,970	3,315	3,760
2 - Risca/Pontymister/Bedwas	2,823	2,979	3,324	3,771
3 - Nelson	2,671	2,817	3,144	3,567
4 - Ystrad Mynach	2,773	2,926	3,265	3,704
5 - Bargoed/Blackwood	2,697	2,845	3,175	3,602
6 - Rhymney	2,129	2,246	2,507	2,843

Sources: *Experian Local Expenditure 2020 (2020 prices)*
Experian growth rates - Retail Planner Breifing Note 19 (January 2022)
Excludes Special Forms of Trading (SFT)

Table 3 - Total comparison goods expenditure (£m)

Zone	2022	2025	2030	2035
1 - Caerphilly	149.23	158.08	177.49	202.77
2 - Risca/Pontymister/Bedwas	90.82	95.77	106.93	121.42
3 - Nelson	60.92	64.67	72.62	82.80
4 - Ystrad Mynach	89.50	94.86	105.96	120.54
5 - Bargoed/Blackwood	135.50	143.27	160.05	182.02
6 - Rhymney	48.79	51.53	57.41	65.20
Total	**574.77**	**608.18**	**680.45**	**774.75**

Source: Tables 1 and 2

Table 4 - Base year 2022 comparsion goods market shares by zone (%)

Zone/Location	1	2	3	4	5	6	Inflow
Zone 1							
Caerphilly town centre	28.0%	15.8%	7.0%	6.2%	2.7%	0.0%	15.0%
Caerphilly out of centre	29.9%	14.3%	9.9%	11.5%	7.3%	1.4%	10.0%
Other Zone 1	0.5%	0.0%	0.1%	0.0%	0.0%	0.0%	5.0%
Sub-total	**58.4%**	**30.1%**	**17.0%**	**17.7%**	**10.0%**	**1.4%**	
Zone 2							
Risca/Pontymister	0.0%	13.4%	0.3%	2.7%	0.4%	0.0%	5.0%
Other Zone 2	0.0%	0.6%	0.1%	0.2%	0.0%	0.0%	5.0%
Sub-total	**0.0%**	**14.0%**	**0.4%**	**2.9%**	**0.4%**	**0.0%**	
Zone 3							
Nelson	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	5.0%
Other Zone 3	0.0%	0.0%	0.4%	0.1%	0.0%	0.0%	5.0%
Sub-total	**0.0%**	**0.0%**	**2.5%**	**0.1%**	**0.0%**	**0.0%**	
Zone 4							
Ystrad Mynach	1.9%	0.2%	4.8%	9.4%	1.6%	0.5%	5.0%
Other Zone 4	0.0%	0.0%	0.6%	6.2%	2.8%	0.2%	5.0%
Sub-total	**1.9%**	**0.2%**	**5.4%**	**15.6%**	**4.4%**	**0.7%**	
Zone 5							
Bargoed	0.0%	0.1%	3.0%	0.2%	7.2%	5.0%	5.0%
Blackwood town centre	0.6%	0.9%	6.3%	11.5%	17.1%	2.4%	5.0%
Blackwood out of centre	0.1%	1.5%	5.4%	15.4%	15.1%	6.5%	5.0%
Other Zone 5	0.3%	0.2%	0.1%	0.4%	2.5%	0.0%	5.0%
Sub-total	**1.0%**	**2.7%**	**14.8%**	**27.5%**	**41.9%**	**13.9%**	
Zone 6							
Rhymney	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	5.0%
Other Zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	5.0%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**3.1%**	
Caerphilly CB total	**61.3%**	**47.0%**	**40.1%**	**63.8%**	**56.7%**	**19.1%**	
Outside Caerphilly CB							
Bristol	0.5%	0.1%	0.8%	0.3%	0.1%	0.2%	n/a
Cardiff	29.1%	17.6%	14.6%	15.2%	14.8%	9.5%	n/a
Ebbw Vale/Brynmawr	0.0%	0.0%	0.0%	0.0%	0.0%	5.9%	n/a
Merthyr Tydfil	0.8%	0.5%	27.2%	5.4%	7.4%	51.9%	n/a
Newport/Rogerstone	0.2%	24.1%	0.8%	7.7%	4.7%	1.1%	n/a
Pontypridd	3.8%	1.0%	9.9%	1.8%	1.0%	0.6%	n/a
Other	4.3%	9.7%	6.6%	5.8%	15.3%	11.7%	n/a
Sub-total	**38.7%**	**53.0%**	**59.9%**	**36.2%**	**43.3%**	**80.9%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey April 2022 and Lichfields' analysis.

Table 5 - Base year 2022 comparison goods expendiiture patterns by zone (£M)

Zone/loclation	1	2	3	4	5	6		Total
Expenditure 2022	149.23	90.82	60.92	89.50	135.50	48.79		**574.77**
Zone 1								
Caerphilly town centre	41.79	14.35	4.26	5.55	3.66	0.00	12.28	81.89
Caerphilly out of centre	44.62	12.99	6.03	10.29	9.89	0.68	9.39	93.90
Other Zone 1	0.75	0.00	0.06	0.00	0.00	0.00	0.04	0.85
Sub-total	**87.15**	**27.34**	**10.36**	**15.84**	**13.55**	**0.68**	**21.72**	**176.64**
Zone 2								
Risca/Pontymister	0.00	12.17	0.18	2.42	0.54	0.00	0.81	16.12
Other Zone 2	0.00	0.54	0.06	0.18	0.00	0.00	0.04	0.83
Sub-total	**0.00**	**12.72**	**0.24**	**2.60**	**0.54**	**0.00**	**0.85**	**16.94**
Zone 3								
Nelson	0.00	0.00	1.28	0.00	0.00	0.00	0.07	1.35
Other Zone 3	0.00	0.00	0.24	0.09	0.00	0.00	0.02	0.35
Sub-total	**0.00**	**0.00**	**1.52**	**0.09**	**0.00**	**0.00**	**0.08**	**1.70**
Zone 4								
Ystrad Mynach	2.84	0.18	2.92	8.41	2.17	0.24	0.88	17.65
Other Zone 4	0.00	0.00	0.37	5.55	3.79	0.10	0.52	10.32
Sub-total	**2.84**	**0.18**	**3.29**	**13.96**	**5.96**	**0.34**	**1.40**	**27.97**
Zone 5								
Bargoed	0.00	0.09	1.83	0.18	9.76	2.44	0.75	15.05
Blackwood town centre	0.90	0.82	3.84	10.29	23.17	1.17	2.11	42.30
Blackwood out of centre	0.15	1.36	3.29	13.78	20.46	3.17	2.22	44.44
Other Zone 5	0.45	0.18	0.06	0.36	3.39	0.00	0.23	4.67
Sub-total	**1.49**	**2.45**	**9.02**	**24.61**	**56.77**	**6.78**	**5.32**	**106.45**
Zone 6								
Rhymney	0.00	0.00	0.00	0.00	0.00	1.07	0.06	1.13
Other Zone 6	0.00	0.00	0.00	0.00	0.00	0.44	0.02	0.46
Sub-total	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**1.51**	**0.08**	**1.59**
Caerphilly CB total	**91.48**	**42.69**	**24.43**	**57.10**	**76.83**	**9.32**	**29.45**	**331.29**
Outside Caerphilly CB								
Bristol	0.75	0.09	0.49	0.27	0.14	0.10	n/a	1.83
Cardiff	43.43	15.98	8.89	13.60	20.05	4.63	n/a	106.60
Ebbw Vale/Brynmawr	0.00	0.00	0.00	0.00	0.00	2.88	n/a	2.88
Merthyr Tydfil	1.19	0.45	16.57	4.83	10.03	25.32	n/a	58.40
Newport/Rogerstone	0.30	21.89	0.49	6.89	6.37	0.54	n/a	36.47
Pontypridd	5.67	0.91	6.03	1.61	1.35	0.29	n/a	15.87
Other	6.42	8.81	4.02	5.19	20.73	5.71	n/a	50.88
Sub-total	**57.75**	**48.14**	**36.49**	**32.40**	**58.67**	**39.47**	n/a	**272.92**
TOTAL	**149.23**	**90.82**	**60.92**	**89.50**	**135.50**	**48.79**	n/a	**604.21**

Source: Tables 3 and 4

Table 6 - Future 2025 comparison goods expendiiture patterns by zone (£M)

Zone/loclation	1	2	3	4	5	6		Total
Expenditure 2025	158.08	95.77	64.67	94.86	143.27	51.53		**608.18**
Zone 1								
Caerphilly town centre	44.26	15.13	4.53	5.88	3.87	0.00	13.00	86.67
Caerphilly out of centre	47.26	13.70	6.40	10.91	10.46	0.72	9.94	99.39
Other Zone 1	0.79	0.00	0.06	0.00	0.00	0.00	0.05	0.90
Sub-total	**92.32**	**28.83**	**10.99**	**16.79**	**14.33**	**0.72**	**22.98**	**186.96**
Zone 2								
Risca/Pontymister	0.00	12.83	0.19	2.56	0.57	0.00	0.85	17.01
Other Zone 2	0.00	0.57	0.06	0.19	0.00	0.00	0.04	0.87
Sub-total	**0.00**	**13.41**	**0.26**	**2.75**	**0.57**	**0.00**	**0.89**	**17.89**
Zone 3								
Nelson	0.00	0.00	1.36	0.00	0.00	0.00	0.07	1.43
Other Zone 3	0.00	0.00	0.26	0.09	0.00	0.00	0.02	0.37
Sub-total	**0.00**	**0.00**	**1.62**	**0.09**	**0.00**	**0.00**	**0.09**	**1.80**
Zone 4								
Ystrad Mynach	3.00	0.19	3.10	8.92	2.29	0.26	0.94	18.70
Other Zone 4	0.00	0.00	0.39	5.88	4.01	0.10	0.55	10.93
Sub-total	**3.00**	**0.19**	**3.49**	**14.80**	**6.30**	**0.36**	**1.48**	**29.63**
Zone 5								
Bargoed	0.00	0.10	1.94	0.19	10.32	2.58	0.80	15.91
Blackwood town centre	0.95	0.86	4.07	10.91	24.50	1.24	2.24	44.77
Blackwood out of centre	0.16	1.44	3.49	14.61	21.63	3.35	2.35	47.03
Other Zone 5	0.47	0.19	0.06	0.38	3.58	0.00	0.25	4.94
Sub-total	**1.58**	**2.59**	**9.57**	**26.09**	**60.03**	**7.16**	**5.63**	**112.65**
Zone 6								
Rhymney	0.00	0.00	0.00	0.00	0.00	1.13	0.06	1.19
Other Zone 6	0.00	0.00	0.00	0.00	0.00	0.46	0.02	0.49
Sub-total	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**1.60**	**0.08**	**1.68**
Caerphilly CB total	**96.90**	**45.01**	**25.93**	**60.52**	**81.23**	**9.84**	**31.17**	**350.61**
Outside Caerphilly CB								
Bristol	0.79	0.10	0.52	0.28	0.14	0.10	n/a	1.93
Cardiff	46.00	16.86	9.44	14.42	21.20	4.90	n/a	112.82
Ebbw Vale/Brynmawr	0.00	0.00	0.00	0.00	0.00	3.04	n/a	3.04
Merthyr Tydfil	1.26	0.48	17.59	5.12	10.60	26.75	n/a	61.81
Newport/Rogerstone	0.32	23.08	0.52	7.30	6.73	0.57	n/a	38.52
Pontypridd	6.01	0.96	6.40	1.71	1.43	0.31	n/a	16.82
Other	6.80	9.29	4.27	5.50	21.92	6.03	n/a	53.81
Sub-total	**61.18**	**50.76**	**38.74**	**34.34**	**62.04**	**41.69**	n/a	**288.74**
TOTAL	**158.08**	**95.77**	**64.67**	**94.86**	**143.27**	**51.53**	n/a	**639.35**

Source: Tables 3 and 4

Table 7 - Future 2030 comparison goods expendiiture patterns by zone (£M)

Zone/loclation	1	2	3	4	5	6		Total
Expenditure 2030	177.49	106.93	72.62	105.96	160.05	57.41		**680.45**
Zone 1								
Caerphilly town centre	49.70	16.90	5.08	6.57	4.32	0.00	14.57	97.14
Caerphilly out of centre	53.07	15.29	7.19	12.18	11.68	0.80	11.14	111.36
Other Zone 1	0.89	0.00	0.07	0.00	0.00	0.00	0.05	1.01
Sub-total	**103.66**	**32.19**	**12.35**	**18.75**	**16.00**	**0.80**	**25.76**	**209.51**
Zone 2								
Risca/Pontymister	0.00	14.33	0.22	2.86	0.64	0.00	0.95	19.00
Other Zone 2	0.00	0.64	0.07	0.21	0.00	0.00	0.05	0.97
Sub-total	**0.00**	**14.97**	**0.29**	**3.07**	**0.64**	**0.00**	**1.00**	**19.97**
Zone 3								
Nelson	0.00	0.00	1.53	0.00	0.00	0.00	0.08	1.61
Other Zone 3	0.00	0.00	0.29	0.11	0.00	0.00	0.02	0.42
Sub-total	**0.00**	**0.00**	**1.82**	**0.11**	**0.00**	**0.00**	**0.10**	**2.02**
Zone 4								
Ystrad Mynach	3.37	0.21	3.49	9.96	2.56	0.29	1.05	20.93
Other Zone 4	0.00	0.00	0.44	6.57	4.48	0.11	0.61	12.21
Sub-total	**3.37**	**0.21**	**3.92**	**16.53**	**7.04**	**0.40**	**1.66**	**33.14**
Zone 5								
Bargoed	0.00	0.11	2.18	0.21	11.52	2.87	0.89	17.78
Blackwood town centre	1.06	0.96	4.58	12.18	27.37	1.38	2.50	50.03
Blackwood out of centre	0.18	1.60	3.92	16.32	24.17	3.73	2.63	52.55
Other Zone 5	0.53	0.21	0.07	0.42	4.00	0.00	0.28	5.52
Sub-total	**1.77**	**2.89**	**10.75**	**29.14**	**67.06**	**7.98**	**6.29**	**125.88**
Zone 6								
Rhymney	0.00	0.00	0.00	0.00	0.00	1.26	0.07	1.33
Other Zone 6	0.00	0.00	0.00	0.00	0.00	0.52	0.03	0.54
Sub-total	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**1.78**	**0.09**	**1.87**
Caerphilly CB total	**108.80**	**50.26**	**29.12**	**67.60**	**90.75**	**10.96**	**34.90**	**392.39**
Outside Caerphilly CB								
Bristol	0.89	0.11	0.58	0.32	0.16	0.11	n/a	2.17
Cardiff	51.65	18.82	10.60	16.11	23.69	5.45	n/a	126.32
Ebbw Vale/Brynmawr	0.00	0.00	0.00	0.00	0.00	3.39	n/a	3.39
Merthyr Tydfil	1.42	0.53	19.75	5.72	11.84	29.79	n/a	69.07
Newport/Rogerstone	0.35	25.77	0.58	8.16	7.52	0.63	n/a	43.02
Pontypridd	6.74	1.07	7.19	1.91	1.60	0.34	n/a	18.86
Other	7.63	10.37	4.79	6.15	24.49	6.72	n/a	60.15
Sub-total	**68.69**	**56.67**	**43.50**	**38.36**	**69.30**	**46.44**	n/a	**322.96**
TOTAL	**177.49**	**106.93**	**72.62**	**105.96**	**160.05**	**57.41**	n/a	**715.35**

Source: Tables 3 and 4

Table 8 - Future 2035 comparison goods expendiiture patterns by zone (£M)

Zone/loclation	1	2	3	4	5	6		Total
Expenditure 2035	202.77	121.42	82.80	120.54	182.02	65.20		**774.75**
Zone 1								
Caerphilly town centre	56.78	19.18	5.80	7.47	4.91	0.00	16.61	110.76
Caerphilly out of centre	60.63	17.36	8.20	13.86	13.29	0.91	12.69	126.95
Other Zone 1	1.01	0.00	0.08	0.00	0.00	0.00	0.06	1.15
Sub-total	**118.42**	**36.55**	**14.08**	**21.34**	**18.20**	**0.91**	**29.37**	**238.86**
Zone 2								
Risca/Pontymister	0.00	16.27	0.25	3.25	0.73	0.00	1.08	21.58
Other Zone 2	0.00	0.73	0.08	0.24	0.00	0.00	0.06	1.11
Sub-total	**0.00**	**17.00**	**0.33**	**3.50**	**0.73**	**0.00**	**1.13**	**22.69**
Zone 3								
Nelson	0.00	0.00	1.74	0.00	0.00	0.00	0.09	1.83
Other Zone 3	0.00	0.00	0.33	0.12	0.00	0.00	0.02	0.48
Sub-total	**0.00**	**0.00**	**2.07**	**0.12**	**0.00**	**0.00**	**0.12**	**2.31**
Zone 4								
Ystrad Mynach	3.85	0.24	3.97	11.33	2.91	0.33	1.19	23.83
Other Zone 4	0.00	0.00	0.50	7.47	5.10	0.13	0.69	13.89
Sub-total	**3.85**	**0.24**	**4.47**	**18.80**	**8.01**	**0.46**	**1.89**	**37.72**
Zone 5								
Bargoed	0.00	0.12	2.48	0.24	13.11	3.26	1.01	20.22
Blackwood town centre	1.22	1.09	5.22	13.86	31.13	1.56	2.85	56.92
Blackwood out of centre	0.20	1.82	4.47	18.56	27.48	4.24	2.99	59.77
Other Zone 5	0.61	0.24	0.08	0.48	4.55	0.00	0.31	6.28
Sub-total	**2.03**	**3.28**	**12.25**	**33.15**	**76.27**	**9.06**	**7.16**	**143.20**
Zone 6								
Rhymney	0.00	0.00	0.00	0.00	0.00	1.43	0.08	1.51
Other Zone 6	0.00	0.00	0.00	0.00	0.00	0.59	0.03	0.62
Sub-total	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**2.02**	**0.11**	**2.13**
Caerphilly CB total	**124.30**	**57.07**	**33.20**	**76.90**	**103.21**	**12.45**	**39.77**	**446.90**
Outside Caerphilly CB								
Bristol	1.01	0.12	0.66	0.36	0.18	0.13	n/a	2.47
Cardiff	59.01	21.37	12.09	18.32	26.94	6.19	n/a	143.92
Ebbw Vale/Brynmawr	0.00	0.00	0.00	0.00	0.00	3.85	n/a	3.85
Merthyr Tydfil	1.62	0.61	22.52	6.51	13.47	33.84	n/a	78.57
Newport/Rogerstone	0.41	29.26	0.66	9.28	8.55	0.72	n/a	48.88
Pontypridd	7.71	1.21	8.20	2.17	1.82	0.39	n/a	21.50
Other	8.72	11.78	5.46	6.99	27.85	7.63	n/a	68.43
Sub-total	**78.47**	**64.35**	**49.60**	**43.64**	**78.81**	**52.75**	n/a	**367.62**
TOTAL	**202.77**	**121.42**	**82.80**	**120.54**	**182.02**	**65.20**	n/a	**814.52**

Source: Tables 3 and 4

Table 9A - Comparison goods expenditure 2022 to 2035 (£M) - Baseline growth

	2022	2025	2030	2035
Available expenditure				
Zone 1 - Caerphilly	176.64	186.96	209.51	238.86
Zone 2 - Risca/Pontymister/Bedwas	16.94	17.89	19.97	22.69
Zone 3 - Nelson	1.70	1.80	2.02	2.31
Zone 4 - Ystrad Mynach	27.97	29.63	33.14	37.72
Zone 5 - Bargoed/Blackwood	106.45	112.65	125.88	143.20
Zone 6 - Rhymney	1.59	1.68	1.87	2.13
Total	**331.29**	**350.61**	**392.39**	**446.90**
Turnover of existing facilities				
Zone 1 - Caerphilly	176.64	188.74	212.08	241.13
Zone 2 - Risca/Pontymister/Bedwas	16.94	18.10	20.34	23.13
Zone 3 - Nelson	1.70	1.81	2.04	2.32
Zone 4 - Ystrad Mynach	27.97	29.89	33.58	38.18
Zone 5 - Bargoed/Blackwood	106.45	113.75	127.81	145.32
Zone 6 - Rhymney	1.59	1.70	1.91	2.17
Total	**331.29**	**353.99**	**397.78**	**452.25**
Surplus/deficit expenditure £M				
Zone 1 - Caerphilly	0.00	-1.78	-2.58	-2.27
Zone 2 - Risca/Pontymister/Bedwas	0.00	-0.22	-0.37	-0.44
Zone 3 - Nelson	0.00	-0.01	-0.02	-0.01
Zone 4 - Ystrad Mynach	0.00	-0.26	-0.45	-0.46
Zone 5 - Bargoed/Blackwood	0.00	-1.10	-1.93	-2.12
Zone 6 - Rhymney	0.00	-0.02	-0.04	-0.05
Total	**0.00**	**-3.38**	**-5.38**	**-5.35**

Source: Tables 5 to 8

Table 9B - Comparison goods expenditure 2022 to 2035 (£M) - high growth

	2022	2025	2030	2035
Available expenditure				
Zone 1 - Caerphilly	176.64	189.00	215.82	250.37
Zone 2 - Risca/Pontymister/Bedwas	16.94	17.93	20.10	22.91
Zone 3 - Nelson	1.70	1.83	2.10	2.46
Zone 4 - Ystrad Mynach	27.97	29.84	33.90	39.15
Zone 5 - Bargoed/Blackwood	106.45	113.22	128.06	147.22
Zone 6 - Rhymney	1.59	1.68	1.88	2.14
Total	**331.29**	**353.49**	**401.87**	**464.24**
Turnover of existing facilities				
Zone 1 - Caerphilly	176.64	188.74	212.08	241.13
Zone 2 - Risca/Pontymister/Bedwas	16.94	18.10	20.34	23.13
Zone 3 - Nelson	1.70	1.81	2.04	2.32
Zone 4 - Ystrad Mynach	27.97	29.89	33.58	38.18
Zone 5 - Bargoed/Blackwood	106.45	113.75	127.81	145.32
Zone 6 - Rhymney	1.59	1.70	1.91	2.17
Total	**331.29**	**353.99**	**397.78**	**452.25**
Surplus/deficit expenditure £M				
Zone 1 - Caerphilly	0.00	0.26	3.74	9.24
Zone 2 - Risca/Pontymister/Bedwas	0.00	-0.17	-0.24	-0.22
Zone 3 - Nelson	0.00	0.01	0.06	0.14
Zone 4 - Ystrad Mynach	0.00	-0.05	0.32	0.97
Zone 5 - Bargoed/Blackwood	0.00	-0.52	0.25	1.90
Zone 6 - Rhymney	0.00	-0.02	-0.03	-0.04
Total	**0.00**	**-0.50**	**4.09**	**11.99**

Table 10A - Comparison goods floorspace capacity up to 2035 (cumulative) - baseline growth

	2022	2025	2030	2035
Turnover density new floorspace (£ per sq.m)	£5,000	£5,343	£6,003	£6,825
Floorspace projection (sq.m net)				
Zone 1 - Caerphilly	0	-333	-429	-332
Zone 2 - Risca/Pontymister/Bedwas	0	-41	-62	-65
Zone 3 - Nelson	0	-2	-3	-2
Zone 4 - Ystrad Mynach	0	-48	-74	-68
Zone 5 - Bargoed/Blackwood	0	-205	-322	-310
Zone 6 - Rhymney	0	-4	-6	-7
Total	**0**	**-632**	**-897**	**-783**
Floorspace Projection (sq.m gross)				
Zone 1 - Caerphilly	0	-444	-572	-443
Zone 2 - Risca/Pontymister/Bedwas	0	-55	-82	-86
Zone 3 - Nelson	0	-3	-3	-2
Zone 4 - Ystrad Mynach	0	-64	-99	-90
Zone 5 - Bargoed/Blackwood	0	-273	-430	-414
Zone 6 - Rhymney	0	-5	-8	-9
Total	**0**	**-843**	**-1,196**	**-1,045**

Source: Table 9A

Table 10B - Comparison goods floorspace capacity up to 2035 (cumulative) - High growth

	2022	2025	2030	2035
Turnover density new floorspace (£ per sq.m)	£5,000	£5,343	£6,003	£6,825
Floorspace projection (sq.m net)				
Zone 1 - Caerphilly	0	48	623	1,354
Zone 2 - Risca/Pontymister/Bedwas	0	-33	-41	-32
Zone 3 - Nelson	0	2	11	21
Zone 4 - Ystrad Mynach	0	-10	53	141
Zone 5 - Bargoed/Blackwood	0	-98	41	279
Zone 6 - Rhymney	0	-4	-5	-6
Total	**0**	**-94**	**682**	**1,757**
Floorspace Projection (sq.m gross)				
Zone 1 - Caerphilly	0	64	830	1,805
Zone 2 - Risca/Pontymister/Bedwas	0	-44	-54	-43
Zone 3 - Nelson	0	3	14	28
Zone 4 - Ystrad Mynach	0	-13	71	189
Zone 5 - Bargoed/Blackwood	0	-131	55	372
Zone 6 - Rhymney	0	-5	-7	-7
Total	**0**	**-125**	**909**	**2,343**

Source: Table 9B

Appendix 4 : Food/beverage assessment

Table 1A - Study area population projections - baseline growth

Zone	2022	2025	2030	2035
1 - Caerphilly	53,014	53,224	53,542	53,928
2 - Risca/Pontymister/Bedwas	32,172	32,150	32,170	32,199
3 - Nelson	22,809	22,958	23,098	23,212
4 - Ystrad Mynach	32,276	32,419	32,452	32,543
5 - Bargoed/Blackwood	50,241	50,358	50,408	50,533
6 - Rhymney	22,915	22,945	22,898	22,935
Total	**213,427**	**214,054**	**214,568**	**215,350**

Sources: Experian MMG3 population projections

Table 1B - Study area population projections - high growth

Zone	2022	2025	2030	2035
1 - Caerphilly	53,014	54,055	55,791	57,527
2 - Risca/Pontymister/Bedwas	32,172	32,203	32,254	32,305
3 - Nelson	22,809	23,268	24,034	24,799
4 - Ystrad Mynach	32,276	32,580	33,088	33,595
5 - Bargoed/Blackwood	50,241	50,574	51,128	51,683
6 - Rhymney	22,915	22,938	22,976	23,014
Total	**213,427**	**215,618**	**219,271**	**222,923**

Sources: Caerphilly CBC - Population and Housing Preferred Growth option

Table 2 - Food/beverage expenditure per person per annum (£)

Zone	2022	2025	2030	2035
1 - Caerphilly	1,189	1,228	1,291	1,351
2 - Risca/Pontymister/Bedwas	1,172	1,210	1,273	1,332
3 - Nelson	1,104	1,140	1,199	1,254
4 - Ystrad Mynach	1,148	1,185	1,247	1,304
5 - Bargoed/Blackwood	1,116	1,153	1,213	1,268
6 - Rhymney	897	926	974	1,019

Sources: *Experian Local Expenditure 2020 (2020 prices)*
Experian growth rates - Retail Planner Breifing Note 19 (January 2022)

Table 3 - Total food/beverage expenditure (£m)

Zone	2022	2025	2030	2035
1 - Caerphilly	63.03	65.36	69.12	72.86
2 - Risca/Pontymister/Bedwas	37.71	38.90	40.95	42.89
3 - Nelson	25.18	26.17	27.69	29.11
4 - Ystrad Mynach	37.05	38.42	40.47	42.44
5 - Bargoed/Blackwood	56.07	58.06	61.14	64.08
6 - Rhymney	20.55	21.25	22.30	23.37
Total	**239.60**	**248.16**	**261.68**	**274.74**

Source: Tables 1 and 2

Table 4 - Base year 2022 food/beverage market shares by zone (%)

Zone/Location	1	2	3	4	5	6	Inflow
Zone 1							
Caerphilly	50.2%	30.5%	14.5%	17.1%	5.2%	5.4%	15.0%
Other Zone 1	1.7%	0.8%	0.0%	0.0%	0.0%	0.0%	5.0%
Sub-total	**51.9%**	**31.3%**	**14.5%**	**17.1%**	**5.2%**	**5.4%**	
Zone 2							
Risca/Pontymister	0.0%	14.8%	0.0%	8.2%	0.0%	0.0%	5.0%
Other Zone 2	2.3%	3.8%	0.0%	2.3%	0.0%	0.0%	5.0%
Sub-total	**2.3%**	**18.6%**	**0.0%**	**10.5%**	**0.0%**	**0.0%**	
Zone 3							
Nelson	0.0%	0.0%	25.7%	0.9%	0.0%	0.0%	5.0%
Other Zone 3	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	5.0%
Sub-total	**0.0%**	**0.0%**	**27.3%**	**0.9%**	**0.0%**	**0.0%**	
Zone 4							
Ystrad Mynach	0.2%	0.0%	0.0%	1.7%	1.6%	0.9%	5.0%
Other Zone 4	0.0%	0.0%	0.7%	4.9%	0.0%	0.0%	5.0%
Sub-total	**0.2%**	**0.0%**	**0.7%**	**6.6%**	**1.6%**	**0.9%**	
Zone 5							
Bargoed	0.3%	0.0%	3.5%	0.3%	6.6%	3.1%	5.0%
Blackwood	0.0%	0.6%	4.8%	20.6%	39.1%	7.3%	5.0%
Other Zone 5	0.0%	1.7%	0.0%	6.5%	5.6%	0.0%	5.0%
Sub-total	**0.3%**	**2.3%**	**8.3%**	**27.4%**	**51.3%**	**10.4%**	
Zone 6							
Rhymney	0.0%	0.6%	0.0%	0.0%	0.0%	6.5%	5.0%
Other Zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	5.0%
Sub-total	**0.0%**	**0.6%**	**0.0%**	**0.0%**	**0.0%**	**9.2%**	
Caerphilly CB total	**54.7%**	**52.8%**	**50.8%**	**62.5%**	**58.1%**	**25.9%**	
Outside Caerphilly CB							
Cardiff	35.5%	19.1%	15.7%	14.9%	15.6%	7.6%	n/a
Ebbw Vale/Brynmawr	0.0%	0.0%	0.8%	0.0%	0.0%	3.2%	n/a
Merthyr Tydfil	2.6%	0.0%	7.6%	0.0%	4.7%	25.8%	n/a
Newport/Rogerstone	1.8%	11.8%	0.0%	3.4%	2.8%	0.0%	n/a
Pontypridd	1.4%	0.0%	1.3%	2.4%	0.0%	0.0%	n/a
Other	4.0%	16.3%	23.8%	16.8%	18.8%	37.5%	n/a
Sub-total	**45.3%**	**47.2%**	**49.2%**	**37.5%**	**41.9%**	**74.1%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey April 2022 and Lichfields' analysis.

Table 5 - Base year 2022 food/beverage expendiiture patterns by zone (£M)

Zone/loclation	1	2	3	4	5	6		Total
Expenditure 2022	63.03	37.71	25.18	37.05	56.07	20.55		**239.60**
Zone 1								
Caerphilly	31.64	11.50	3.65	6.34	2.92	1.11	10.09	67.24
Other Zone 1	1.07	0.30	0.00	0.00	0.00	0.00	0.07	1.45
Sub-total	**32.71**	**11.80**	**3.65**	**6.34**	**2.92**	**1.11**	**10.16**	**68.69**
Zone 2								
Risca/Pontymister	0.00	5.58	0.00	3.04	0.00	0.00	0.45	9.07
Other Zone 2	1.45	1.43	0.00	0.85	0.00	0.00	0.20	3.93
Sub-total	**1.45**	**7.01**	**0.00**	**3.89**	**0.00**	**0.00**	**0.65**	**13.00**
Zone 3								
Nelson	0.00	0.00	6.47	0.33	0.00	0.00	0.36	7.16
Other Zone 3	0.00	0.00	0.40	0.00	0.00	0.00	0.02	0.42
Sub-total	**0.00**	**0.00**	**6.87**	**0.33**	**0.00**	**0.00**	**0.38**	**7.59**
Zone 4								
Ystrad Mynach	0.13	0.00	0.00	0.63	0.90	0.18	0.10	1.93
Other Zone 4	0.00	0.00	0.18	1.82	0.00	0.00	0.10	2.10
Sub-total	**0.13**	**0.00**	**0.18**	**2.45**	**0.90**	**0.18**	**0.20**	**4.03**
Zone 5								
Bargoed	0.19	0.00	0.88	0.11	3.70	0.64	0.29	5.81
Blackwood	0.00	0.23	1.21	7.63	21.92	1.50	1.71	34.20
Other Zone 5	0.00	0.64	0.00	2.41	3.14	0.00	0.33	6.52
Sub-total	**0.19**	**0.87**	**2.09**	**10.15**	**28.76**	**2.14**	**2.33**	**46.53**
Zone 6								
Rhymney	0.00	0.23	0.00	0.00	0.00	1.34	0.08	1.64
Other Zone 6	0.00	0.00	0.00	0.00	0.00	0.55	0.03	0.58
Sub-total	**0.00**	**0.23**	**0.00**	**0.00**	**0.00**	**1.89**	**0.11**	**2.23**
Caerphilly CB total	**34.48**	**19.91**	**12.79**	**23.16**	**32.58**	**5.32**	**13.83**	**142.07**
Outside Caerphilly CB								
Cardiff	22.38	7.20	3.95	5.52	8.75	1.56	n/a	49.36
Ebbw Vale/Brynmawr	0.00	0.00	0.20	0.00	0.00	0.66	n/a	0.86
Merthyr Tydfil	1.64	0.00	1.91	0.00	2.64	5.30	n/a	11.49
Newport/Rogerstone	1.13	4.45	0.00	1.26	1.57	0.00	n/a	8.41
Pontypridd	0.88	0.00	0.33	0.89	0.00	0.00	n/a	2.10
Other	2.52	6.15	5.99	6.22	10.54	7.71	n/a	39.13
Sub-total	**28.55**	**17.80**	**12.39**	**13.89**	**23.49**	**15.23**	n/a	**111.36**
TOTAL	**63.03**	**37.71**	**25.18**	**37.05**	**56.07**	**20.55**	n/a	**253.42**

Source: Tables 3 and 4

Table 6 - Future 2025 food/beverage expendiiture patterns by zone (£M)

Zone/loclation	1	2	3	4	5	6		Total
Expenditure 2025	65.36	38.90	26.17	38.42	58.06	21.25		**248.16**
Zone 1								
Caerphilly	32.81	11.86	3.79	6.57	3.02	1.15	10.45	69.65
Other Zone 1	1.11	0.31	0.00	0.00	0.00	0.00	0.07	1.50
Sub-total	**33.92**	**12.18**	**3.79**	**6.57**	**3.02**	**1.15**	**10.52**	**71.15**
Zone 2								
Risca/Pontymister	0.00	5.76	0.00	3.15	0.00	0.00	0.47	9.38
Other Zone 2	1.50	1.48	0.00	0.88	0.00	0.00	0.20	4.07
Sub-total	**1.50**	**7.24**	**0.00**	**4.03**	**0.00**	**0.00**	**0.67**	**13.44**
Zone 3								
Nelson	0.00	0.00	6.73	0.35	0.00	0.00	0.37	7.44
Other Zone 3	0.00	0.00	0.42	0.00	0.00	0.00	0.02	0.44
Sub-total	**0.00**	**0.00**	**7.14**	**0.35**	**0.00**	**0.00**	**0.39**	**7.88**
Zone 4								
Ystrad Mynach	0.13	0.00	0.00	0.65	0.93	0.19	0.10	2.00
Other Zone 4	0.00	0.00	0.18	1.88	0.00	0.00	0.11	2.17
Sub-total	**0.13**	**0.00**	**0.18**	**2.54**	**0.93**	**0.19**	**0.21**	**4.18**
Zone 5								
Bargoed	0.20	0.00	0.92	0.12	3.83	0.66	0.30	6.02
Blackwood	0.00	0.23	1.26	7.91	22.70	1.55	1.77	35.43
Other Zone 5	0.00	0.66	0.00	2.50	3.25	0.00	0.34	6.75
Sub-total	**0.20**	**0.89**	**2.17**	**10.53**	**29.79**	**2.21**	**2.41**	**48.19**
Zone 6								
Rhymney	0.00	0.23	0.00	0.00	0.00	1.38	0.08	1.70
Other Zone 6	0.00	0.00	0.00	0.00	0.00	0.57	0.03	0.60
Sub-total	**0.00**	**0.23**	**0.00**	**0.00**	**0.00**	**1.95**	**0.12**	**2.30**
Caerphilly CB total	**35.75**	**20.54**	**13.30**	**24.01**	**33.73**	**5.50**	**14.32**	**147.16**
Outside Caerphilly CB								
Cardiff	23.20	7.43	4.11	5.72	9.06	1.61	n/a	51.14
Ebbw Vale/Brynmawr	0.00	0.00	0.21	0.00	0.00	0.68	n/a	0.89
Merthyr Tydfil	1.70	0.00	1.99	0.00	2.73	5.48	n/a	11.90
Newport/Rogerstone	1.18	4.59	0.00	1.31	1.63	0.00	n/a	8.70
Pontypridd	0.92	0.00	0.34	0.92	0.00	0.00	n/a	2.18
Other	2.61	6.34	6.23	6.45	10.92	7.97	n/a	40.52
Sub-total	**29.61**	**18.36**	**12.88**	**14.41**	**24.33**	**15.74**	n/a	**115.32**
TOTAL	**65.36**	**38.90**	**26.17**	**38.42**	**58.06**	**21.25**	n/a	**262.48**

Source: Tables 3 and 4

Table 7 - Future 2030 food/beverage expendiiture patterns by zone (£M)

Zone/loclation	1	2	3	4	5	6		Total
Expenditure 2030	69.12	40.95	27.69	40.47	61.14	22.30		**261.68**
Zone 1								
Caerphilly	34.70	12.49	4.02	6.92	3.18	1.20	11.03	73.54
Other Zone 1	1.18	0.33	0.00	0.00	0.00	0.00	0.08	1.58
Sub-total	**35.87**	**12.82**	**4.02**	**6.92**	**3.18**	**1.20**	**11.11**	**75.12**
Zone 2								
Risca/Pontymister	0.00	6.06	0.00	3.32	0.00	0.00	0.49	9.87
Other Zone 2	1.59	1.56	0.00	0.93	0.00	0.00	0.21	4.29
Sub-total	**1.59**	**7.62**	**0.00**	**4.25**	**0.00**	**0.00**	**0.71**	**14.16**
Zone 3								
Nelson	0.00	0.00	7.12	0.36	0.00	0.00	0.39	7.88
Other Zone 3	0.00	0.00	0.44	0.00	0.00	0.00	0.02	0.47
Sub-total	**0.00**	**0.00**	**7.56**	**0.36**	**0.00**	**0.00**	**0.42**	**8.34**
Zone 4								
Ystrad Mynach	0.14	0.00	0.00	0.69	0.98	0.20	0.11	2.11
Other Zone 4	0.00	0.00	0.19	1.98	0.00	0.00	0.11	2.29
Sub-total	**0.14**	**0.00**	**0.19**	**2.67**	**0.98**	**0.20**	**0.22**	**4.40**
Zone 5								
Bargoed	0.21	0.00	0.97	0.12	4.04	0.69	0.32	6.34
Blackwood	0.00	0.25	1.33	8.34	23.91	1.63	1.87	37.31
Other Zone 5	0.00	0.70	0.00	2.63	3.42	0.00	0.36	7.11
Sub-total	**0.21**	**0.94**	**2.30**	**11.09**	**31.37**	**2.32**	**2.54**	**50.76**
Zone 6								
Rhymney	0.00	0.25	0.00	0.00	0.00	1.45	0.09	1.78
Other Zone 6	0.00	0.00	0.00	0.00	0.00	0.60	0.03	0.63
Sub-total	**0.00**	**0.25**	**0.00**	**0.00**	**0.00**	**2.05**	**0.12**	**2.42**
Caerphilly CB total	**37.81**	**21.62**	**14.07**	**25.29**	**35.53**	**5.78**	**15.11**	**155.21**
Outside Caerphilly CB								
Cardiff	24.54	7.82	4.35	6.03	9.54	1.70	n/a	53.97
Ebbw Vale/Brynmawr	0.00	0.00	0.22	0.00	0.00	0.71	n/a	0.94
Merthyr Tydfil	1.80	0.00	2.10	0.00	2.87	5.75	n/a	12.53
Newport/Rogerstone	1.24	4.83	0.00	1.38	1.71	0.00	n/a	9.16
Pontypridd	0.97	0.00	0.36	0.97	0.00	0.00	n/a	2.30
Other	2.76	6.68	6.59	6.80	11.50	8.36	n/a	42.69
Sub-total	**31.31**	**19.33**	**13.63**	**15.18**	**25.62**	**16.53**	n/a	**121.59**
TOTAL	**69.12**	**40.95**	**27.69**	**40.47**	**61.14**	**22.30**	n/a	**276.80**

Source: Tables 3 and 4

Table 8 - Future 2035 food/beverage expendiiture patterns by zone (£M)

Zone/loclation	1	2	3	4	5	6		Total
Expenditure 2035	72.86	42.89	29.11	42.44	64.08	23.37		**274.74**
Zone 1								
Caerphilly	36.57	13.08	4.22	7.26	3.33	1.26	11.60	77.33
Other Zone 1	1.24	0.34	0.00	0.00	0.00	0.00	0.08	1.66
Sub-total	**37.81**	**13.42**	**4.22**	**7.26**	**3.33**	**1.26**	**11.68**	**78.99**
Zone 2								
Risca/Pontymister	0.00	6.35	0.00	3.48	0.00	0.00	0.52	10.34
Other Zone 2	1.68	1.63	0.00	0.98	0.00	0.00	0.23	4.51
Sub-total	**1.68**	**7.98**	**0.00**	**4.46**	**0.00**	**0.00**	**0.74**	**14.85**
Zone 3								
Nelson	0.00	0.00	7.48	0.38	0.00	0.00	0.41	8.28
Other Zone 3	0.00	0.00	0.47	0.00	0.00	0.00	0.02	0.49
Sub-total	**0.00**	**0.00**	**7.95**	**0.38**	**0.00**	**0.00**	**0.44**	**8.77**
Zone 4								
Ystrad Mynach	0.15	0.00	0.00	0.72	1.03	0.21	0.11	2.21
Other Zone 4	0.00	0.00	0.20	2.08	0.00	0.00	0.12	2.40
Sub-total	**0.15**	**0.00**	**0.20**	**2.80**	**1.03**	**0.21**	**0.23**	**4.62**
Zone 5								
Bargoed	0.22	0.00	1.02	0.13	4.23	0.72	0.33	6.65
Blackwood	0.00	0.26	1.40	8.74	25.05	1.71	1.96	39.11
Other Zone 5	0.00	0.73	0.00	2.76	3.59	0.00	0.37	7.45
Sub-total	**0.22**	**0.99**	**2.42**	**11.63**	**32.87**	**2.43**	**2.66**	**53.21**
Zone 6								
Rhymney	0.00	0.26	0.00	0.00	0.00	1.52	0.09	1.87
Other Zone 6	0.00	0.00	0.00	0.00	0.00	0.63	0.03	0.66
Sub-total	**0.00**	**0.26**	**0.00**	**0.00**	**0.00**	**2.15**	**0.13**	**2.53**
Caerphilly CB total	**39.85**	**22.65**	**14.79**	**26.52**	**37.23**	**6.05**	**15.88**	**162.97**
Outside Caerphilly CB								
Cardiff	25.86	8.19	4.57	6.32	10.00	1.78	n/a	56.72
Ebbw Vale/Brynmawr	0.00	0.00	0.23	0.00	0.00	0.75	n/a	0.98
Merthyr Tydfil	1.89	0.00	2.21	0.00	3.01	6.03	n/a	13.15
Newport/Rogerstone	1.31	5.06	0.00	1.44	1.79	0.00	n/a	9.61
Pontypridd	1.02	0.00	0.38	1.02	0.00	0.00	n/a	2.42
Other	2.91	6.99	6.93	7.13	12.05	8.76	n/a	44.77
Sub-total	**33.00**	**20.24**	**14.32**	**15.91**	**26.85**	**17.32**	n/a	**127.65**
TOTAL	**72.86**	**42.89**	**29.11**	**42.44**	**64.08**	**23.37**	n/a	**290.62**

Source: Tables 3 and 4

Table 9A - Food/beverage expenditure 2022 to 2035 (£M) - Baseline growth

	2022	2025	2030	2035
Available expenditure				
Zone 1 - Caerphilly	68.69	71.15	75.12	78.99
Zone 2 - Risca/Pontymister/Bedwas	13.00	13.44	14.16	14.85
Zone 3 - Nelson	7.59	7.88	8.34	8.77
Zone 4 - Ystrad Mynach	4.03	4.18	4.40	4.62
Zone 5 - Bargoed/Blackwood	46.53	48.19	50.76	53.21
Zone 6 - Rhymney	2.23	2.30	2.42	2.53
Total	**142.07**	**147.16**	**155.21**	**162.97**
Turnover of existing facilities				
Zone 1 - Caerphilly	68.69	69.72	71.48	73.29
Zone 2 - Risca/Pontymister/Bedwas	13.00	13.20	13.53	13.87
Zone 3 - Nelson	7.59	7.70	7.90	8.10
Zone 4 - Ystrad Mynach	4.03	4.09	4.20	4.30
Zone 5 - Bargoed/Blackwood	46.53	47.23	48.42	49.64
Zone 6 - Rhymney	2.23	2.26	2.32	2.38
Total	**142.07**	**144.21**	**147.85**	**151.58**
Surplus expenditure £M				
Zone 1 - Caerphilly	0.00	1.43	3.64	5.70
Zone 2 - Risca/Pontymister/Bedwas	0.00	0.25	0.63	0.98
Zone 3 - Nelson	0.00	0.18	0.45	0.67
Zone 4 - Ystrad Mynach	0.00	0.09	0.21	0.32
Zone 5 - Bargoed/Blackwood	0.00	0.97	2.34	3.57
Zone 6 - Rhymney	0.00	0.04	0.10	0.16
Total	**0.00**	**2.95**	**7.36**	**11.39**

Source: Tables 5 to 8

Table 9B - Food/beverage expenditure 2022 to 2035 (£M) - High growth

	2022	2025	2030	2035
Available expenditure				
Zone 1 - Caerphilly	68.69	71.91	77.34	82.71
Zone 2 - Risca/Pontymister/Bedwas	13.00	13.50	14.34	15.15
Zone 3 - Nelson	7.59	7.99	8.67	9.35
Zone 4 - Ystrad Mynach	4.03	4.20	4.49	4.76
Zone 5 - Bargoed/Blackwood	46.53	48.42	51.58	54.59
Zone 6 - Rhymney	2.23	2.30	2.43	2.54
Total	**142.07**	**148.32**	**158.85**	**169.11**
Turnover of existing facilities				
Zone 1 - Caerphilly	68.69	69.72	71.48	73.29
Zone 2 - Risca/Pontymister/Bedwas	13.00	13.20	13.53	13.87
Zone 3 - Nelson	7.59	7.70	7.90	8.10
Zone 4 - Ystrad Mynach	4.03	4.09	4.20	4.30
Zone 5 - Bargoed/Blackwood	46.53	47.23	48.42	49.64
Zone 6 - Rhymney	2.23	2.26	2.32	2.38
Total	**142.07**	**144.21**	**147.85**	**151.58**
Surplus expenditure £M				
Zone 1 - Caerphilly	0.00	2.19	5.85	9.42
Zone 2 - Risca/Pontymister/Bedwas	0.00	0.30	0.81	1.27
Zone 3 - Nelson	0.00	0.29	0.78	1.26
Zone 4 - Ystrad Mynach	0.00	0.11	0.29	0.46
Zone 5 - Bargoed/Blackwood	0.00	1.19	3.16	4.95
Zone 6 - Rhymney	0.00	0.04	0.11	0.16
Total	**0.00**	**4.12**	**11.00**	**17.53**

Table 10A - Food/beverage floorspace capacity up to 2035 (cumulative) -Baseline growth

	2022	2025	2030	2035
Turnover density new floorspace (£ per sq.m)	£5,000	£5,075	£5,204	£5,335
Floorspace projection (sq.m gross)				
Zone 1 - Caerphilly	0	281	699	1,069
Zone 2 - Risca/Pontymister/Bedwas	0	48	121	183
Zone 3 - Nelson	0	36	86	126
Zone 4 - Ystrad Mynach	0	17	40	59
Zone 5 - Bargoed/Blackwood	0	191	450	669
Zone 6 - Rhymney	0	8	19	29
Total	**0**	**581**	**1,415**	**2,135**

Source: Table 9A

Table 10B - Food/beverage floorspace capacity up to 2035 (cumulative) - High growth

	2022	2025	2030	2035
Turnover density new floorspace (£ per sq.m)	£5,000	£5,075	£5,204	£5,335
Floorspace projection (sq.m gross)				
Zone 1 - Caerphilly	0	431	1,125	1,766
Zone 2 - Risca/Pontymister/Bedwas	0	60	156	239
Zone 3 - Nelson	0	57	149	235
Zone 4 - Ystrad Mynach	0	21	56	86
Zone 5 - Bargoed/Blackwood	0	235	607	928
Zone 6 - Rhymney	0	8	21	31
Total	**0**	**811**	**2,113**	**3,286**

Source: Table 9B

Appendix 5 : Main Centres Analysis

Caerphilly Principal Town Centre

Caerphilly is the largest centre in the County Borough and is identified as a 'Principal Town Centre' in Policy SP4 of the LDP. It is also identified as being located within the Southern Connections Corridor (SCC). Paragraph 1.60 of the LDP, which is associated with Policy SP3 (Development Strategy – Development in the Southern Connections Corridor) states that:

"the Southern Connections Corridor and, in particular Caerphilly Town, is currently the County Borough's most attractive area to potential investors...the Strategy seeks to make the most efficient use of existing infrastructure by limiting development to opportunities to redevelop previously developed land (brownfield) where feasible, subject to satisfactory environmental and community safeguards and consideration of the role and function of settlements within the strategy area."

Paragraph 1.61 goes onto say,

"the Strategy is underpinned by a balanced approach to managing future growth through resource efficient settlement patterns that reduce the need to travel."

The key roles of Caerphilly Principal Town Centre include:

- Convenience shopping: three supermarkets, including Morrisons, Heron Foods and Iceland (there is also a Tesco, Asda and Aldi within Caerphilly but not within the Principal Town Centre boundary). Morrisons being the largest supermarket within the centre; three convenience stores, including Quality Mini Market, Caerphilly Market and News Booze; a health foods store; a bakery; two newsagents (one being a WHSmith which also includes a Post Office); a sandwich shop; an off licence; and two tobacconists.
- Comparison shopping: a good proportion of multiple retailers selling a range of higher and lower order comparison goods;
- Services: provides a good range of high street national banks, building societies, estate agents, cafés, restaurants, takeaways and pubs/bars. There are also a good range of hairdressers and beauty salons as well as two travel agents;
- entertainment and evening economy: limited range of bars and social clubs, however, a good range of restaurants, takeaways and public houses. There are also two amusement centres and three betting shops; and
- Community facilities: four education establishments, a library, two community halls, three chiropodists, a health centre, three car repair units, Council Offices, two dentists, two gyms, a doctors surgery, a car filling station, two veterinary surgeries, a police station and a taxi office.

Mix of uses and occupier representation

Caerphilly has 233 retail and service units (source: Caerphilly County Borough Council Land Use Survey 2021). The diversity of uses within Caerphilly is set out in Table 7.1, compared with the UK average and the County Borough average.

Table 7.1 Mix of Shop and Service Uses - Caerphilly Principal Town Centre

Type	Number units	% units	Caerphilly CB average %	UK average %
Comparison goods retail	58	24.9	21.2	29.0
Convenience goods retail	14	6.0	7.2	9.7
Financial/professional services	33	14.2	11.7	9.0
Restaurants/cafés	17	7.3	5.8	10
Pubs/bars	8	3.4	3.0	4.9
Hot food takeaways	15	6.4	8.9	6.2
Other non-retail services	65	27.9	29.3	16.5
Vacant	23	9.9	12.8	14.7
Total	**233**	**100.0**	**100.0**	**100.0**

Source: Caerphilly County Borough Council Land Use Survey 2021 and Experian Goad UK averages (2021).

The mix of uses in Caerphilly Principal Town Centre broadly reflects the Caerphilly County Borough Council average, but there are several differences. The centre has a higher proportion of comparison retailers compared with the Caerphilly County Borough Council average, but this figure is lower than the UK average. The centre also has a slightly lower proportion of convenience retailers when compared with the Caerphilly County Borough Council and UK averages. Conversely, the centre has higher proportions of financial/professional services than both the Caerphilly County Borough Council average and the UK average. The proportion of restaurants/cafes and pubs/bars within the centre is higher than the County Borough averages but lower than the UK averages. Whilst the proportion of hot food takeaways within the centre is lower than the County Borough average but slightly higher than the UK average. There were 23 vacant units within the centre at the time of the Caerphilly County Borough Council Land Use Survey 2021, equating to a vacancy rate of 9.9%, which is lower than the County Borough average and much lower than the national average.

Retailer Representation

Table 7.2 provides a breakdown of comparison shop units by category. Caerphilly Principal Town Centre has many comparison shops (58), the second highest of all the centres in Caerphilly (Blackwood Principal Town Centre having the most comparison goods uses) and most Experian Goad comparison goods categories are represented with only one category not represented, as shown in Table 7.3 i.e. cars/motorcycles accessories. There is only one unit selling china, glass and gifts, one variety, department and catalogue unit, one jeweller and only two florists, nurserymen and seedsmen. The choice of shops in many categories is strong.

There is a higher proportion of books, arts, cards and stationers; DIY, hardware and homeware units; chemists, drug stores and opticians; florists, nurserymen and seedsmen; and toys, hobby, cycle and sports, but there is a lower than average proportion of clothing and footwear; furniture/carpets and textiles; electrical, music and photography; china, glass and gifts; jewellers; and charity and second-hand shops.

Table 7.2 Mix of Comparison Goods Uses - Caerphilly Principal Town Centre

Type	**Number units**	**% units**	**UK average**
Clothing and footwear	11	19.0	21.5
Furniture, carpets and textiles	3	5.2	7.7
Books, arts, cards and stationers	4	6.9	6.1
Electrical, music and photography	3	5.2	9.3
DIY, hardware and homeware	6	10.3	6.9
China, glass and gifts	1	1.7	5.5
Cars, motorcycles and accessories	0	0.0	1.3
Chemists, drug stores and opticians	11	19.0	12.0
Variety, department and catalogue	1	1.7	1.7
Florists, nurserymen and seedsmen	2	3.4	2.2
Toys, hobby, cycle and sports	7	12.1	5.5
Jewellers	1	1.7	5.1
Charity and second-hand shops	5	8.6	10.0
Other comparison goods retailers	3	5.2	5.2
Total	**58**	**100.0**	**100.0**

Source: Caerphilly County Borough Council Land Use Survey 2021 and Experian Goad UK averages (2021).

Overall, Caerphilly Principal Town Centre has a relatively good range and choice of comparison goods outlets, which reflects the centre's size and role within the County Borough. The national multiple comparison retailers include

- Ponden Home Interiors & Edinburgh Woollen Mill;
- EE;
- British Heart Foundation;
- Vodafone;
- Bon Marche;
- Shoe Zone;
- Clarks;
- Game;
- Card Factory;
- Superdrug;
- Sports Direct;
- Tenovus;
- Savers;
- New Look;
- Select;
- Peacocks;

- Lloyds Pharmacy;
- Claire's Accessories;
- The Works;
- Poundland;
- JD Sports;
- Boots; and,
- Specsavers.

Service Uses

Caerphilly Principal Town Centre has an excellent range of service uses (138 units), as shown in Table 7.3, the highest number out of all nine main centres in the County Borough.

The centre has a higher proportion of fast food/takeaways, banks/other financial services, betting shops/casinos/amusements, travel agents and hairdressers/beauty parlours compared with the national averages. The proportion of estate agents/valuers and travel agents were fairly similar to the UK average. However, there is a significantly lower proportion of restaurants/cafes and pubs/bars when compared with the national average. There are no laundrettes/dry cleaners within the centre. National food/beverage outlets include Costa, Greggs and Domino's Pizza.

Table 7.3 Mix of Service Uses - Caerphilly Principal Town Centre

Type	Number units	% units	UK average
Restaurants/cafés	17	17.3	24.0
Fast food/takeaways	15	15.3	14.9
Pubs/bars	8	8.2	11.8
Banks/other financial services	13	13.3	8.4
Betting shops/casinos/amusement	5	5.1	3.8
Estate agents/valuers	7	7.1	7.8
Travel agents	2	2.0	1.5
Hairdressers/beauty parlours	31	31.6	26.3
Launderettes/dry cleaners	0	0.0	1.7
Sub-total	98	100.0	100.0
Other	40		
Total	**138**		

Source: Caerphilly County Borough Council Land Use Survey 2021 and Experian Goad UK averages (2021).

Characteristics of the Shopping Area

The centre has a strategic shopping role providing both convenience as well as high and low order comparison retailers. The centre stretches along the B4600 in the north and to the railway line, adjacent to the Caerphilly Train Station and Bus Station to the south. The centre also has a relatively strong leisure/entertainment offer. Caerphilly Principal Town Centre serves customers both from the wider County Borough as well as the needs of local people, assisted by good public transport links. The centre is bounded predominantly by residential areas.

The centre includes the Castle Court Shopping Centre, which is a modern, pedestrianised and partially covered shopping centre. The Shopping Centre is occupied at ground floor level only and includes a selection of eating and drinking outlets and retail units. The Shopping Centre provides a focus for national retailers including Bon Marche, Boots, Card Factory, Claire's, Clarks, Game, Holland and Barrett, JD Sports, Poundland, Shoe Zone and WHSmith.

Commercial rents

According to the VOA, Zone A retail rents vary throughout the centre. Caerphilly Principal Town Centre has the highest rental levels of all five Principal Town Centres and all four Local Centres.

Towards the north of the centre, within the Castle Court Shopping Centre, along Market Street and towards the northern end of Cardiff Road facing Caerphilly Castle, Zone A rents range from £293 to £487 per sq.m and this represents the prime pitch. Rents within the Castle Court Shopping Centre are the highest ranging between £450 - £487. On the peripheries of the centre, Zone A retail rents are lower. Towards the northern boundary (Piccadilly Square) of the centre, Zone A rents are around £175 – £200 per sq.m and towards the southern centre boundary they are between £120 and £367.50 per sq.m. Along the main through route towards the south of the centre, along Cardiff Road, Zone A retail rents range between £180 - £367.50 per sq.m, whilst rents on streets adjoining this main through route range between £120 - £200 per sq.m. Zone A retail rents along Pentrebane Street appear to be some of the lowest in the centre ranging between £120 - £160 per sq.m. Overall, the centre provides a good mix of affordable to more expensive prime pitch shop premises.

Customer views on Shops and Services

As part of the household survey, respondents were asked if they had used shops and services in Caerphilly in the last year. Of those who had used shops/services in Caerphilly, respondents were asked what they like and dislike about the town centre. The main factor liked in Caerphilly was 26.6% mentioning that it was close to home. The other main factors mentioned (5% of respondents or more) were:

- *factors liked*: nothing/none mentioned (17.9%); historic attributes (13.7%); good choice of shops in general (11.8%); good range of shops (8.1%); shopping environment (7.0%); good independent shops (6.8%); good choice of clothing shops (6.0%); and car parking (5.7%).
- *factors disliked*: nothing/none mentioned (46.6%); poor range of shops (12.7%); poor choice of shops in general (12.2%); car parking (7.1%); poor choice of clothing shops (6.1%); and maintenance/cleanliness (5.2%).

Caerphilly Principal Town Centre has the second highest percentage for its range of shops (8.1%), Blackwood Principal Town Centre has the highest percentage (9.1%). Caerphilly Principal Town Centre also has the second highest percentage for its range of clothing shops (6.0%) (Blackwood Principal Town Centre has the highest percentage (7.6%)) when compared with the other centres. The centre rates least favourably in terms of good quality shops (0.2%), good range of services (0.3%), good events (0.4%), familiarity/habit (0.8%) and maintenance/cleanliness (1.3%).

Stakeholder feedback

A selection of stakeholders were asked about their views on town centres in the County Borough. Comments were received regarding Caerphilly, Bargoed and Ystrad Mynach Principal Town Centres. Most stakeholders described the centres current commercial performance as “satisfactory”, but performance was mostly considered to be “declining”. The key strengths and weakness suggested were:

- *Strengths*: friendly community; variety of retail outlets and services; many independent businesses; and Caerphilly Castle.
- *Weaknesses*: Poor parking; inadequate parking enforcement; lack of interesting shops and communal areas; and too many shops are owned and left empty in dilapidated conditions, which prevents others having the opportunity to rent them.

Nature and quality of retail environment

The quality of buildings within Caerphilly Principal Town Centre was predominantly good, although some units on the periphery of the centre appear to need refurbishment. There is a historical core to the centre, with Caerphilly Castle and it’s grounds being a key feature, and there appears to be fairly good architectural continuity between the older and more modern buildings surrounding the historic core. The northern section of the centre was dominated by older buildings (apart from the modern Castle Court Shopping Centre development), whilst more modern buildings were located in the central area as well as the southern section of the centre. The Caerphilly Bus Station and Caerphilly Train Station were key features at the southern end of the centre, whilst the Morrisons Supermarket and the Castle Court Shopping Centre were key features at the northern end of the centre.

Based on Caerphilly County Borough Council Land Use Survey 2021 there are 23 vacant commercial units within Caerphilly Principal Town Centre. This represents 9.9% of the total number of units. Vacant units are dispersed throughout the town centre but there is a pocket of vacant units towards the south of the centre, around Cardiff Road and Pentrebane Street.

The centre was dominated by traffic with vehicles most heavily concentrated around the Castle Court Shopping Centre, Morrisons Supermarket and the main through routes through the centre, which include Castle Street, Market Street and Cardiff Road. However, there are frequent pedestrian crossings and wide pavements throughout the centre and the pedestrianised Castle Court Shopping Centre, which is located towards the north of the centre and appeared to be well used. Pedestrian flows were moderate and were highest around Morrisons Supermarket and the Castle Court Shopping Centre. A few cafés/restaurants provide outside seating for customers in the central to northern part of the centre. Street lighting was provided throughout, and public art, landscaping and public seating were also located in a few locations within the centre.

Overall, during the daytime the centre generally felt safe, and a few CCTV cameras were present throughout the centre (particularly within the Castle Court Shopping Centre), but there was some evidence of anti-social behaviour. There was limited evidence of graffiti or vandalism, although there appeared to be a lot of litter and dog fouling within the centre.

The Castle Court Shopping Centre and surrounding streets towards the north of the centre were generally cleaner than towards the south of the centre. Caerphilly Castle and it's grounds act as a substantial area of green/open space, which are located centrally within the centre and are easily accessible from the centre.

There are no Conservation Areas located within the centre, but there are three listed buildings e.g. Caerphilly Workmen's Hall and Institute (ID 16527) (Grade II), War Memorial (ID 21378) (Grade II), The Court House (ID 13568) (Grade II). Caerphilly Castle scheduled monument (ID GM002) and listed building (ID 13539) (Grade I) is also of particular note and is located just West of the centre boundary.

Accessibility and Movement

The household survey results suggest Caerphilly Principal Town Centre attracts customers by a variety of means of transport. Mode of travel for main food shopping within the local area (Zone 1) is relatively similar to the study area averages for car (driver or passenger) with the highest proportion of respondents doing their main food shopping by car (driver) (73.80%) or car (passenger) (13.03%), followed by bus/coach (6.81%). For non-food shopping, the Principal Town Centre attracts a good mix of car (driver or passenger) (51.52% and 10.49% respectively), walking customers (18.82%), bus (10.07%) and train (5.20%), which suggests significantly high levels of accessibility. The survey results also indicated slightly higher levels of dissatisfaction with car parking provision than satisfaction (i.e. 7.12% compared with 5.71%). However, more respondents mentioned bus services as a positive rather than a negative factor (1.46% compared with less than 1%).

The centre is located adjacent to a residential area and is therefore highly accessible on foot for these residents. Pedestrian accessibility within the centre was good – a number of dropped kerbs and pedestrian crossings (zebra and pelican) were provided. Crossing between one side of the road to the other was easily managed. Pavements exist throughout the centre, which were of good quality and provided good accessibility to the commercial units. The pavements were also of a suitable width for pedestrians to pass and open up to wider public spaces within the centre, which includes public seating and public art. The centre is relatively steep as one moves towards the south of the centre, causing difficulties for the less mobile.

There are several free and pay and display car parks located within and in close to the centre (approximately 10 in total). Informal street parking is also scattered throughout the centre and along streets adjoining the centre. There is also short term on-street car parking in the centre (30 minutes on Monday – Saturday between 8am – 6pm), the majority of which is located within the southern section of the centre along Cardiff Road.

The centre is also served by many bus routes, with frequent bus stops throughout. Bus routes serving the centre include 26, 50, A, C9, C16 and C17 and provide links to Bargoed, Blackwood, Ystrad Mynach Principal Town Centres as well as Nelson and Bedwas Local Centres.

Caerphilly Train Station is located along the southern boundary of the centre. There is also another train station in the vicinity of the centre; Aber Train Station, which is approx. 600m to the southwest. Both train stations provide services to locations such as Ystrad Mynach, Bargoed, Rhymney, Penarth and Cardiff.

Catchment area

The household survey results indicate that 59.6% of respondents across the study area had used shops and services in Caerphilly in the last year, which is the highest for the nine centres in the County Borough. In the local area (Zone 1), 86.9% had visited the shops and services in the centre in the last year. In the study area 10.5% of households suggested they do most of their non-food shopping in Caerphilly Principal Town Centre, the highest proportion for all shopping destinations apart from internet shopping (21.3%).

The retail capacity analysis suggests Caerphilly attracts about 58% of its trade from the local Zone 1, but the centre attracts reasonably high levels of trade from the five other zones in the County Borough. The centre has a relatively wide catchment area when compared with other town centres in the Country Borough.

Caerphilly's Strengths, Weaknesses, Opportunities and Threats

Strengths

- The centre has a good range of convenience and comparison stores to service its catchment area, which extends across the Borough and beyond.
- A large food supermarket (Morrisons) is suitable for main and bulk food shopping and is within easy walking distance to the town centre.
- The centre has the second highest number of comparison shops of all centres (Blackwood Principal Town Centre having the highest) in the Borough, with a good range of multiple retailers.
- The centre has the highest number of service uses of all centres in the Borough.
- Good range of non-retail services and entertainment facilities provided within the centre.
- The Castle Court Shopping Centre provides a partially covered pedestrian friendly shopping environment.
- The shop vacancy rate is lower than both the County Borough and national averages.
- Good public transport links i.e. bus and train services located within the centre as well as relatively good car parking provision (which is centrally located) when compared with other centres.
- Caerphilly Castle and its grounds act as a substantial area of green/open space and are easily accessible from the centre.
- Wide pavements to cater for high numbers of visitors, which appeared to be well used.
- The centre is close to residential areas, making it easily accessible to local residents.

Weaknesses

- Limited proportion of restaurants/cafes, pubs/bars and leisure uses within the centre.
- Steep incline towards the south of the centre, which may be difficult for the less mobile to manage.

- Household survey results and stakeholder feedback indicate a noticeable proportion of respondents were dissatisfied particularly with the existing condition of the centre, range of shops and car parking provision.
- Evidence of litter and dog fouling within the centre.

Opportunities

- Opportunity to bring vacant units back into beneficial occupation.

Threats

- The vacant units becoming long term vacant units.
- Further increase in number of vacant units.
- Loss of commercial units to non-commercial units.
- High levels of traffic within the centre could lead to increased air pollution within the local area.
- Some evidence of anti-social behaviour, which could deter people from visiting the centre.
- Loss of operators due to the proximity of Cardiff.

Blackwood Principal Town Centre

Blackwood is designated by Policy SP4 of the LDP as a Principal Town Centre and is identified as being located within the Northern Connections Corridor (NCC). Paragraph 1.58 of the LDP, which is associated with Policy SP2 (Development Strategy – Development in the Northern Connections Corridor) states that,

"*the strategy seeks to capitalise on the development opportunities"* in the Principal Town of Blackwood *"…by providing for a range of uses that reflect the roles and functions of settlements in order to enhance quality of life for residents. Development in the NCC will be targeted to settlements with good public transport links to encourage travel by sustainable modes."*

Paragraph 1.59 goes onto say,

"brownfield sites will be utilised in preference to greenfield sites where feasible, subject to satisfactory environmental and community safeguards."

Mix of uses and retailer occupation

Blackwood Principal Town Centre is geared towards the needs of local people and includes 212 commercial units. 28 of these are vacant which represents a vacancy rate of 13.2%, which is higher than the Caerphilly County Borough average (12.8%) but lower than the UK average (14.7%).

Table 7.4 Blackwood Principal Town Centre: Breakdown of land uses

Type	Number units	% units	Caerphilly CB average %	UK average %
Comparison goods retail	60	28.3	21.2	29.0
Convenience goods retail	10	4.7	7.2	9.7
Financial/professional services	31	14.6	11.7	9.0
Restaurants/cafés	14	6.6	5.8	10.0
Pubs/bars	5	2.4	3.0	4.9
Hot food takeaways	14	6.6	8.9	6.2
Other non-retail services	50	23.6	29.3	16.5
Vacant	28	13.2	12.8	14.7
Total	**212**	**100.0**	**100.0**	**100.0**

Source: Caerphilly County Borough Council Land Use Survey 2021 and Experian Goad UK averages (2021).

There are 10 convenience stores within the centre which provide day to day goods to the local community. These comprise:

- Asda Supermarket;
- Iceland Supermarket;
- Premier Convenience Store;
- Farm Foods Grocer;
- Blackwood News & Wine Newsagent;

- Valley Market Off Licence;
- Bake House Bakery;
- Superior Vapour Tobacconist;
- Vape Shop Tobacconist; and,
- Infinity Mist Tobacconist.

Retailer Representation

Table 7.5 provides a breakdown of comparison shop units by category. Blackwood Principal Town Centre has many comparison shops (60), the highest of all the centres in Caerphilly and all the Experian Goad comparison goods categories are represented. The choice of shops in many categories is strong, particularly clothing and footwear; furniture, carpets and textiles; electrical, music and photography; DIY, hardware and homeware; chemists, drug stores and opticians; and charity and second-hand shops.

Table 7.5 Mix of Comparison Goods Uses - Blackwood Principal Town Centre

Type	Number units	% units	UK average
Clothing and footwear	10	16.7%	21.5
Furniture, carpets and textiles	6	10.0%	7.7
Books, arts, cards and stationers	5	8.3%	6.1
Electrical, music and photography	9	15.0%	9.3
DIY, hardware and homeware	7	11.7%	6.9
China, glass and gifts	1	1.7%	5.5
Cars, motorcycles and accessories	1	1.7%	1.3
Chemists, drug stores and opticians	7	11.7%	12
Variety, department and catalogue	2	3.3%	1.7
Florists, nurserymen and seedsmen	1	1.7%	2.2
Toys, hobby, cycle and sports	1	1.7%	5.5
Jewellers	2	3.3%	5.1
Charity and second-hand shops	6	10.0%	10
Other comparison goods retailers	2	3.3%	5.2
Total	**60**	**100.0%**	**100**

Source: Caerphilly County Borough Council Land Use Survey 2021 and Experian Goad UK averages (2021).

Overall, Blackwood Principal Town Centre has a relatively good range and choice of comparison goods outlets, which reflects the centre's size and role within the County Borough. The national multiple comparison retailers include (Caerphilly County Borough Council's Land Use Survey 2021):

- Asda Supermarket;
- Iceland Supermarket;
- Premier Convenience Store;
- Farm Foods Grocer;

- Wilkinsons;
- Peacocks;
- Boots;
- Vodafone;
- Clinton Cards;
- Select;
- Poundland;
- Halfords;
- B&M Bargains;
- Barnardos;
- Pets at Home;
- Superdrug;
- Bon Marche;
- EE
- Card Factory;
- New Look;
- Holland and Barrett;
- Shoe Zone; and,
- Specsavers.

Service Uses

Blackwood Principal Town Centre has a good range of service uses (114 units), as shown in Table 7.6, the second highest number out of all nine defined centres in the County Borough.

Table 7.6 Mix of Service Uses - Blackwood Principal Town Centre

Type	Number units	% units	UK Average (%)
Restaurants/cafés	14	17.9%	24
Fast food/takeaways	14	17.9%	14.9
Pubs/bars	5	6.4%	11.8
Banks/other financial services	10	12.8%	8.4
Betting shops/casinos/amusement	3	3.8%	3.8
Estate agents/valuers	6	7.7%	7.8
Travel agents	3	3.8%	1.5
Hairdressers/beauty parlours	23	29.5%	26.3
Launderettes/dry cleaners	0	0.0%	1.7
Sub-total	**78**	**100.0%**	**100**

Type	Number units	% units	UK Average (%)
Other	36		
Total	**114**		

Source: Caerphilly County Borough Council Land Use Survey 2021 and Experian Goad UK averages (2021).

The centre has a higher proportion of fast food/takeaways, banks/other financial services, travel agents and hairdressers/beauty parlours compared with the national averages. The proportion of betting shops/casinos/amusements and estate agents/valuers were similar to the UK averages. There is a significantly lower proportion of restaurants/cafes and pubs/bars when compared with the national averages. There are no laundrettes/dry cleaners or multiple food/beverage outlets within the centre.

Accessibility

The centre is located adjacent to a residential area and is therefore highly accessible on foot for these residents. Pedestrian accessibility within the centre was good - a number of dropped kerbs and pedestrian crossings (both zebra and pelican crossings) were provided. Crossing between one side of the road to the other was easily managed. Pavements exist throughout the centre, which were of good quality and provided good accessibility to the commercial units. The pavements were also of a suitable width for pedestrians to pass each other. The centre was flat in nature, making it easy to walk.

There are several free and pay and display car parks located within and in close proximity to the centre. There is also short term on-street car parking within the centre (30 minutes on Monday – Saturday between 8am – 6pm).

Bus stops are located within the centre, which provide frequent links (services 7, 11, 14, 26, 56, 151) with Caerphilly, Bargoed, Ystrad Mynach and Risca/Pontymister Principal Town Centres as well as Nelson and Newbridge Local Centres.

There is no train station in the vicinity of the centre. The nearest train station is in Pengam, which is approximately 3km to the west and provides services to Bargoed, Rhymney, Penarth and Cardiff.

Nature and quality of retail environment

The centre's built form appeared to consist of a mixture of dated and historic buildings, which were generally in good condition, although, one or two units appears to require refurbishment. Public art and public seating were also located in a few locations throughout the centre.

Commercial units are located within close to residential area. The centre generally had moderate footfall, with a lot of commercial units appearing busy inside, but the highest footfall was around the Asda Supermarket and Blackwood Gate Retail Park. Street lighting and CCTV cameras were provided throughout. There was also some evidence of litter and vandalism within the centre, but it was generally clean and tidy.

Traffic through the centre was heavy and lots of cars were parked on-street and in car parks within the centre.

There are no Conservation Areas or scheduled ancient monuments located within the centre, but there is a listed building located towards the North of the centre e.g. Blackwood Miners Welfare Institute (ID 26710) (Grade II*).

Blackwood's Strengths, Weaknesses, Opportunities and Threats

Strengths

- The centre has a good range of convenience and comparison stores to service its catchment area, which extends across the Borough.
- A large food supermarket (Asda) is suitable for main and bulk food shopping, which is located within the centre.
- The centre has the highest number of comparison shops of all centres in the Borough, with a good range of multiple retailers.
- Centrally located car parking, which is easily accessible to visitors.
- Centrally located bus station.
- Evidence of investment in the public realm e.g. public art and public seating.
- Good range of convenience stores to service local needs.
- Shopfronts are generally well maintained.
- Good public transport links via bus stops within the centre.
- The centre is located close to residential areas, making it easily accessible to local residents.

Weaknesses

- Limited number of pubs/bars and leisure uses within the local centre.
- No train station within the centre or within the vicinity of the centre.
- Some evidence of litter and vandalism within the centre.

Opportunities

- Opportunity to bring vacant units back into beneficial occupation.

Threats

- The vacant units become long term vacant units.
- Increase in number of vacant units.
- Loss of commercial units to non-commercial units.
- High levels of traffic within the centre could lead to increased air pollution within the local area.

Bargoed Principal Town Centre

Bargoed Principal Town Centre is designated by Policy SP4 of the LDP and is identified as being located within the Heads of the Valleys Regeneration Area (HOVRA). Paragraph 1.57 of the LDP, which is associated with Policy SP1 (Development Strategy – Development in the Heads of the Valleys Regeneration Area) states that:

"*the development strategy for the Heads of the Valleys Regeneration Area seeks to exploit appropriate development opportunities where they exist in the more deprived northern part of the County Borough, with a view to creating a viable future for all of the communities in the area.*"

Mix of uses and retailer representation

Bargoed Principal Town Centre is primarily geared towards servicing the needs of local people and includes 147 commercial units. 36 of these are vacant which represents a vacancy rate of 24.5%, which is highest within the County Borough, higher than the Caerphilly County Borough average (12.8%) and the UK average (14.7%). The vacant units are scatted through the centre, with a couple of units clustered along Hanbury Road and High Street, towards the north of the centre.

Table 7.7 Bargoed Principal Town Centre: Breakdown of land uses

Type	Number units	% Units	Caerphilly CB average %	UK average %
Comparison goods retail	25	17.0	21.2	29.0
Convenience goods retail	8	5.4	7.2	9.7
Financial/professional services	12	8.2	11.7	9.0
Restaurants/cafés	6	4.1	5.8	10.0
Pubs/bars	2	1.4	3.0	4.9
Hot food takeaways	14	9.5	8.9	6.2
Other non-retail services	44	29.9	29.3	16.5
Vacant	36	24.5	12.8	14.7
Total	**147**	**100.0**	**100.0**	**100.0**

Source: Caerphilly County Borough Council Land Use Survey 2021 and Experian Goad UK averages (2021).

There is a good variety of convenience stores (8) including: Morrison's Supermarket, Iceland Frozen Food shop; Best One-Off Licence; Bananas Greengrocer; Bargoed Convenience Store; Churchill Butchers; Cheesecake Lady Bakery; and Vape with Ease Tobacconist. The number of comparison shops and A1 service uses is also good (25 units and 19 units respectively). Financial/professional services (use class A2) include: two betting offices; an accountants office; two financial advisors; two solicitors; two estate agents; a health care office; a housing association office; and a bank. The national retailers within the centre include:

- Barnardos;
- Savers;
- Peacocks;
- Card Factory;

- Iceland Frozen Food;
- Morrisons Supermarket;
- Betfred Betting Office;
- Ladbrokes Betting Office;
- Barclays Bank;
- Subway Sandwich Shop; and,
- Greggs Bakery.

Accessibility

The centre is located adjacent to a residential area and is therefore highly accessible on foot for these residents. Pedestrian accessibility within the centre was good – a shared surface for cars and pedestrians was available along Hanbury Road, a number of dropped kerbs and pedestrian crossings (zebra) were provided. Crossing between one side of the road to the other was easily managed. Pavements exist throughout the centre, which were of good quality and provided good accessibility to the commercial units. The pavements were also of a suitable width for pedestrians to pass each other, they also opened up to wider public spaces within the centre, which included public seating and public art. The centre had some gradual sloping but walking around was fairly straightforward.

There are several free and pay and display car parks located within and in close proximity to the centre. There is also short term on-street car parking within the centre (30 minutes on Monday – Saturday between 8am – 6pm).

Bus stops are located within the centre, which provide fairly frequent links (services 1, 2, 3, 14, 27, 50, C9, C17 and X38) with Caerphilly, Blackwood and Ystrad Mynach Principal Town Centres as well as Nelson and Rhymney Local Centres.

There are two train stations in the vicinity of the centre; Bargoed Train Station, which is approx. 90m to the north and Gilfach Fargoed Train Station, which is approx. 300m to the south. Both of which provide services to Penarth, Rhymney and Cardiff.

Nature and quality of retail environment

The shops that are occupied are generally well maintained. We understand Bargoed Town Centre underwent regeneration works back in 2003 (LPA ref. P/03/0437) and in association with this application a new retail development plateau and bus station were created. However, there does not appear to be any more recent regeneration/refurbishment within the centre. The centre's built form appeared to consist mostly of dated and historic buildings, which require refurbishment. Public art, landscaping and public seating were also located in a few locations within the centre.

Commercial units are located close to residential area. The centre generally had a high footfall, getting quieter as you moved towards the northern and southern boundaries of the centre. The highest footfall was around the Morrisons Supermarket. Street lighting was provided throughout and there was little evidence of litter or vandalism within the centre, it appeared to be clean and tidy. CCTV cameras were also provided within the centre along Hanbury Road.

Traffic through the centre was heavy and lots of cars were parked on-street and in car parks within the centre.

There are no Conservation Areas within the centre but there were two listed buildings located within the centre e.g. Hanbury Road Baptist Chapel and Schoolrooms, including gates and gatepiers (ID 21428) (Grade II*) and Police Court and Police Station including forecourt walls, gates and railways (ID 26493) (Grade II). Another listed building is located just outside the northern centre boundary e.g. Bargoed and Gilfach War Memorial (ID 26491) (Grade II). There are no scheduled ancient monuments located within the centre.

Bargoed's Strengths, Weaknesses, Opportunities and Threats

Strengths

- A large food supermarket (Morrisons) is suitable for main and bulk food shopping, which is located within the centre. The car park provides opportunities for linked trips.
- Centrally located car parking and good provision.
- Centrally located bus station/train station within the vicinity of the centre. Both of which provide good public transport links.
- Evidence of investment in the public realm e.g. public art, landscaping and public seating.
- Good range of convenience stores to service local needs.
- Shopfronts and streets within the centre were generally well maintained.
- Shared surface along Hanbury Road for cars and pedestrians, improving pedestrian accessibility within the centre.
- The centre is located close to residential areas, making it easily accessible to local residents.
- The centre appears to be clean and tidy.

Weaknesses

- Limited number of pubs/bars and leisure uses within the local centre.
- Lack of recent regeneration/refurbishment within the centre.

Opportunities

- Opportunity to bring vacant units back into beneficial occupation.
- Opportunity to for the centre to undergo some regeneration/refurbishment.

Threats

- The vacant units become long term vacant units.
- Increase in number of vacant units.
- Loss of commercial units to non-commercial units.
- High levels of traffic within the centre could lead to increased air pollution within the local area.

- A lack of recent regeneration/refurbishment within the centre could deter people from visiting.

Ystrad Mynach Principal Town Centre

Ystrad Mynach Principal Town Centre is designated by Policy SP4 of the LDP and is identified as being located within the Northern Connections Corridor (NCC). Paragraph 1.58 of the LDP, which is associated with Policy SP2 (Development Strategy – Development in the Northern Connections Corridor) states that,

"*the strategy seeks to capitalise on the development opportunities"* in the Principal Town of Ystrad Mynach *"...by providing for a range of uses that reflect the roles and functions of settlements in order to enhance quality of life for residents. Development in the NCC will be targeted to settlements with good public transport links to encourage travel by sustainable modes."* Paragraph 1.59 goes onto say, *"brownfield sites will be utilised in preference to greenfield sites where feasible, subject to satisfactory environmental and community safeguards."*

Mix of uses and retailer representation

Ystrad Mynach Principal Town Centre is primarily geared towards the needs of local people and includes 89 commercial units. Three of these are vacant which represents a vacancy rate of 3.4%, which is significantly below the Caerphilly County Borough and UK averages (12.8% and 14.7% respectively).

Table 7.8 Ystrad Mynach Principal Town Centre: Breakdown of land uses

Type	Number units	% units	Caerphilly CB average %	UK average %
Comparison goods retail	18	20.2	21.2	29.0
Convenience goods retail	11	12.4	7.2	9.7
Financial/professional services	12	13.5	11.7	9.0
Restaurants/cafés	2	2.2	5.8	10.0
Pubs/bars	2	2.2	3.0	4.9
Hot food takeaways	10	11.2	8.9	6.2
Other non-retail services	31	34.8	29.3	16.5
Vacant	3	3.4	12.8	14.7
Total	**89**	**100.0**	**100.0**	**100.0**

Source: Caerphilly County Borough Council Land Use Survey 2021 and Experian Goad UK averages (2021).

There are 11 convenience stores within the centre which provide day to day goods to the local community. These comprise:

- Lidl Supermarket;
- Tesco Supermarket;
- Timpsons (Tesco) Supermarket;
- Spar Convenience Store;
- Premier Convenience Store;
- Veg of Evans Greengrocer;

- Finishing Touches Baker;
- Cwm Bakery;
- Nisa Local Newsagent;
- Noels Family Butchers; and,
- Ystrad Headshop Tobacconist.

The comparison offer is also good and comprises 18 units including: a trophies and engraving shop; a household textiles shop; two gift shops; two card shops; a household goods shop; a general clothing shop; two charity shops; a menswear shop; two pharmacies; a jewellery shop; a hardware shop; a carpet and flooring shop and two opticians. The only national goods retailers which are represented within the centre are Lloyds Pharmacy, Spar Convenience Store, Nisa Local Newsagent, Premier Convenience Store, Lidl Supermarket and Tesco Supermarket.

Accessibility

Pedestrian accessibility within the centre was good - a number of pedestrian crossings (zebra) were provided. Both Penallta Road and Bedwlwyn Road were narrow in places, which may cause congestion when vehicles are parked on-street on one or either side of the road. Pavements exist throughout the centre, which were of good quality and provided good accessibility to the commercial units. The pavements were also of a suitable width for pedestrians to pass each other. The centre was flat in some locations and gradually sloping in others, making it easy to walk.

There is a large Tesco car park located within the centre, which is free and unrestricted and consists of approximately 490 car parking spaces. There is also a free and unrestricted car park located adjacent to Tesco, which is associated with a Lidl Supermarket and consists of approximately 100 car parking spaces. The Oakfield Street Pay and Display Car Park is also located within the centre, which consists of approximately 68 car parking spaces and has charges that apply for 1 hour, 2 hours, 3 hours, 4 hours, a day or a week. There is also short term on-street car parking within the centre (1 hour on Monday – Saturday between 8am – 6pm). Informal street parking is also scattered throughout the centre and along streets adjoining the centre.

Bus stops are located within the centre, which provide frequent links (services 7, 11, 50, C9, C16 and C17) with Caerphilly, Bargoed and Blackwood Principal Town Centres as well as Nelson Local Centre.

The Ystrad Mynach Train Station is located approximately 400m southwest of the centre and provides links to locations including Bargoed, Rhymney, Penarth and Cardiff.

Nature and quality of retail environment

The centre’s built form appeared to consist of a mixture of dated and historic buildings, which were generally in good condition.

Commercial units are located within close proximity to residential units some of which are interspersed within the centre’s commercial frontage. The largest cluster of commercial units was located along Bedwlwyn Road and Penalta Road. The centre generally had low footfall, but the highest footfall was around the Tesco and Lidl Supermarkets. Crossing between one side of the road to the other was easily managed. Street lighting and CCTV cameras were provided throughout and there was no evidence of litter or vandalism within the centre, it appears to be fairly clean and tidy.

Traffic through the centre was light but lots of cars were parked on-street and in car parks within the centre.

There are no Conservation Areas, listed buildings or scheduled ancient monuments located within the centre.

Ystrad Mynach's Strengths, Weaknesses, Opportunities and Threats

Strengths

- Good range of convenience shops including two large food supermarkets (Tesco and Lidl), which are suitable for main and bulk food shopping and located within the centre.
- Easily accessible car parks as well as on-street parking.
- Very low vacancy rate.
- Shopfronts are generally well maintained.
- Good public transport links i.e. bus routes located within the centre and a train station located close to the centre.
- Centrally located car parking and good provision.
- The centre is located close to residential area, making it easily accessible to local residents.

Weaknesses

- No pubs/bars.
- Narrow roads and pavements in places.

Opportunities

- Opportunity to bring vacant units back into beneficial occupation.

Threats

- The vacant units become long term vacant units.
- Further increase in vacant units.
- Loss of commercial units to non-commercial units.

Risca/Pontymister Principal Town Centre

Risca/Pontymister Principal Town Centre is designated by Policy SP4 of the LDP and is identified as being located within the Southern Connections Corridor (SCC) and paragraph 1.60 of the LDP, which is associated with Policy SP3 (Development Strategy – Development in the Southern Connections Corridor) states that the SCC,

"*is currently the County Borough's most attractive area to potential investors, but a strategy which relies solely on the south of the County Borough for economic progress is unsustainable in the long term. In light of this the Strategy seeks to make the most efficient use of existing infrastructure by limiting development to opportunities to redevelop previously developed land (brownfield) where feasible, subject to satisfactory environmental and community safeguards and consideration of the role and function of settlements within the strategy area.*"

Mix of uses and retailer representation

The Principal Town Centre runs along Tredegar Street and Commercial Street and is located approximately 9km from the Principal Town Centre boundary of Caerphilly. It comprises 105 commercial units. 13 of the units are vacant which represents a vacancy rate of 12.4% which is slightly lower than the Caerphilly County Borough average (12.8%) and lower than the UK average (14.7%).

Table 7.9 Risca/Pontymister Principal Town Centre: Breakdown of land uses

Type	Number of Units (2022)	Percentage of Units (%)	Caerphilly County Borough Average (%)	UK Average (%)
Comparison goods retail	19	18.1	21.2	29
Convenience goods retail	10	9.5	7.2	9.7
Financial/professional services	12	11.4	11.7	9
Restaurants/cafés	9	8.6	5.8	10
Pubs/bars	0	0.0	3.0	4.9
Hot food takeaways	13	12.4	8.9	6.2
Other non-retail services	29	27.6	29.3	16.5
Vacant	13	12.4	12.8	14.7
Total	**105**	**100%**	**100%**	**100**

Source: Caerphilly County Borough Council Land Use Survey 2021 and Experian Goad UK averages (2021).

The centre has a good provision of convenience shops comprising:

- Lidl Supermarket;
- One Stop Convenience Store;
- Family Shopper Convenience Store;
- Risca Mini Market Convenience Store;
- The Park Shop Greengrocer;
- AD Turner & Sons Butcher;

- Dave Thomas Butcher;
- Howard's Butcher;
- S&S Newsagents; and,
- Empire Vapes Tobacconist.

These shops provide day to day goods for the community of Risca/Pontymister. The comparison offer is also good and comprises 18 units including: a children's clothing shop, a ladies clothing shop, a greeting cards shop, three furniture and household goods shops, two pharmacies, three charity shops, a florist, a toy shop, an art gallery, a carpets and flooring shop, two opticians, a sports goods shop and a music shop. The two pharmacies (Well Pharmacy and Pern's Pharmacy) and the two opticians (Phillips Opticians and Optimise) provide a valuable service to the local community.

There are 11 A1 service units within the principal town centre including: a stonemason, a photography studio, a computer services shop, six hairdressers, a barber and a wedding services shop. There are 12 A2 units in the centre, which represents a rate of 11.4%. This is slightly lower than the Caerphilly County Borough average (11.8%) but higher than the UK average (9%). There are nine restaurants/cafes within the centre which represents a rate of 8.6% and there are 13 hot food takeaways which represents a rate of 12.4%, both of which are higher than the Caerphilly County Borough averages (5.8% and 8.9% respectively). The rate of restaurants/cafes is lower than the UK average, whilst the rate of hot food takeaways is significantly higher than the UK average. Although these figures are high, there is a good range of different uses such as cafes, coffee shops, restaurants, a bakery, and a variety of hot food takeaways.

There are 13 vacant units within the centre, which represents a rate of 12.4%. This reflects the Caerphilly County Borough average (12.8%) but is lower than the UK average (14.7%).

Accessibility

Pedestrian accessibility within the centre was good - a number of dropped kerbs and pedestrian crossings (both zebra and pelican crossings) were provided. Pavements exist on either side of Tredegar Street and Commercial Street, which are the main streets running through the centre. The pavements were of good quality and provided good accessibility to the commercial units. The pavements were also fairly narrow in some locations, making it difficult to pass people, but it also widened up in a number of other locations throughout the centre as well, which made passing pedestrians easier. The centre was flat in nature, making it easy to walk.

There was a large Lidl car park located within the centre, which is free and unrestricted and consists of approximately 107 car parking spaces (including five disabled car parking spaces and three mother and baby car parking spaces). There are also three free and unrestricted car parks located within close proximity to the centre including: Tredegar Terrace Car Park consisting of approximately 64 car parking spaces; Risca & Pontymister Station Park and Ride consisting of approximately 93 car parking spaces (including six disabled car parking spaces); and the Risca United Football Club Car Park consisting of approximately 25 car parking spaces (including 2 disabled car parking spaces). There is also short term on-street car parking within the centre (1 hour on Monday – Saturday between 8am – 6pm). There is also informal street parking scattered throughout the centre and along streets adjoining the centre.

Bus stops are located along Tredegar Street and Commercial Street, which provide links (services 56, 151 and X15) with Blackwood Principal Town Centre and Newbridge Local Centre.

The Risca and Pontymister Train Station is located approximately 300m northeast of the centre and provides links to locations including Cross Keys, Ebbw Vale Town, Cardiff Central and Newport.

Nature and quality of retail environment

The centre was pleasant with well-maintained open space adjacent (Risca Park/Tredegar Gardens and a small memorial garden, both of which were located along Tredegar Street and Commercial Street) is linear in nature and the commercial units are located in close proximity to residential dwellings, some of which are interspersed within the centre's commercial frontage alongside other non-commercial units such as religious institutions (Bethany Baptist Chapel). Traffic through the centre was relatively busy but crossing between one side of the road to the other was easily managed. As mentioned above, the pavements were good quality and condition, but were fairly narrow in some locations. Street lighting was provided throughout and there was no evidence of litter or vandalism within the centre.

CCTV cameras were provided within the centre, along Commercial Street, although some appeared to be covered.

Pedestrian footfall was generally quiet. The busiest areas were within the centre of the centre in and around the Lidl Supermarket.

There are no Conservation Areas within the centre but there were two listed buildings within the retail centre. These are the Bethany English Baptist Church and attached Sunday School (ID 22506) (Grade II) and the former Risca Palace Cinema (ID 22523) (Grade II). There are also four other Grade II listed buildings located within close proximity to the centre, including: Moriah Baptist Church (ID 22507); Entrance to Tredegar Grounds (ID 22516); Jubilee Statue in Tredegar Grounds (ID 22517); and Commercial Street War Memorial (ID 87741).

Risca/Pontymister's Strengths, Weaknesses, Opportunities and Threats

Strengths

- Good range of convenience shops including a large food supermarket (Lidl), which is suitable for main and bulk food shopping and is located within the centre.
- Easily accessible car parks as well as on-street parking.
- Low vacancy rate.
- Good range of A3 uses including cafes, coffee shops, restaurants, a bakery, and a variety of hot food takeaways.
- Shopfronts are generally well maintained.

- Good public transport links i.e. bus services located within the centre and a train station located close to the centre.
- The streets within the centre was well maintained.
- Pleasant town centre with well-maintained open spaces adjacent.

Weaknesses

- No pubs/bars.

Opportunities

- Opportunity to bring vacant units back into beneficial occupation.
- The pavements were relatively narrow is some locations throughout the centre. There could be an opportunity to increase the pavements widths in these locations.

Threats

- The vacant units become long term vacant units.
- Further increase in the number of vacant units.
- Loss of commercial units to non-commercial units.
- Narrow pavements could cause congestion in some areas of the centre, causing visitors to be unable to pass each other safely.

Newbridge Local Centre

Newbridge Local Centre is a medium sized local centre which serves the community of Newbridge. The local centre is designated by Policy SP4 of the LDP as a Local Centre and is identified as being located within the Northern Connections Corridor. The centre comprises 76 commercial units. The centre includes nine vacant units, eight of which appeared to be vacant retail/service uses and one appeared to be a vacant office. This represents a vacancy rate of 11.8%.

The centre has a good convenience goods offer with two general convenience stores (The Co-Operative and Premier Store Newbridge), a fruit and veg shop (Digger's), a butcher (Clarry Matthews) and a tobacconist (Little Vape Shop). There is also a good comparison goods offer provided within the centre, which includes: an electrical goods shop (A & A Services), a carpets and flooring shop (MKB Carpets and Flooring), two pharmacies (Lloyds Pharmacy and Pearns Pharmacy), a florist (E Jenkins), two general clothing shops (Regis and Callidora), three household goods shops (The Cooks Cupboard, Nuvo Designs and Newbridge Trading Company), a gift shop (Lilybees), a charity shop (St David's Hospice Care) and two opticians (FL Wangler and Phillips Opticians).

The other uses within the local centre include: 16 service uses including ten hairdressers/barbers, a Post Office, two photo studios, a clothing alterations shop, and a computer services use, a shoe repairs and key cutting shop; two accountant offices; a solicitor's office; three estate agents offices; a financial advisor's office; two betting offices; three cafes; a bakery; a public house; three social clubs; seven hot food takeaways; a chiropractic surgery; a dental surgery; a Baptist chapel; an amusement centre; two tattoo studios and three beauty salons.

Two free car parks were located within the local centre - Meredith Terrace Car Park, consisting of approximately 10 car parking spaces (including one disabled car parking space) and another just west of the Newbridge Train Station, located along High Street, consisting of approximately 24 car parking spaces (including three disabled car parking spaces). There are also two free car parks located just outside of the local centre. One consists of approximately 16 car parking spaces (including two electric vehicular charging spaces), located along West View Road (West View Car Park) and another with approximately 75 car parking spaces (including five disabled car parking spaces) located adjacent to the Newbridge Train Station (Newbridge Station Park and Ride). The Newbridge Station Park and Ride and Newbridge Train Station are located within approximately 60m of the centre. There is also short term on-street car parking within the centre (1 hour on Monday – Saturday between 8am – 6pm). There is also informal street parking scattered throughout the centre and along streets adjoining the centre.

The centre is served by bus services 5, 21, 52, 151, N2 and X15 – services 5, 21, 52, 151 and X15 provide links with Blackwood Town Centre (Interchange, Interchange – Stand 3, Interchange – Stand 6 and Interchange – Stand 8) and Risca/Pontymister Town Centre (Spar – Stop A and Moriah Baptist Church – Stop B).

The Newbridge Train Station is located just outside the eastern boundary of the centre and provides links to locations including Ebbw Vale Town and Cardiff.

Pedestrian accessibility within the centre was good - a number of dropped kerbs and a pedestrian (zebra) crossing was provided. The quality of the street paving could be improved – there were a number of cracks present. The pavements were also relatively narrow in some locations, making it difficult to pass people, but it also widened up in a number of other locations throughout the centre as well, which made passing pedestrians easier. The centre was flat in some locations and gradually sloping in others, but walking around was straightforward.

Street lighting and CCTV cameras were provided throughout the centre. Public art and public seating were also located in a few locations within the centre, notably on the corner of High Street and Celynen Road, on the corner of High Street and Hynewydd Terrace and adjacent to the Meredith Terrace Car Park, located on the corner of Meredith Terrace and High Street.

The centre's built form appears to consist of a mixture of older and historic buildings, which were generally in poor condition. Graffiti as well as litter and dog fouling were found throughout and only a few litter bins appeared to be provided. The centre lacked any open space and very minimal landscaping.

A section of the centre, towards the most western boundary along High Street, is included within the Newbridge Conservation Area. There are also two listed buildings located within the centre e.g. Celynen Collieries Workmen's Institute (ID 21500) (Grade II) and Celynen Collieries Workmen's Memorial Hall, including forecourt wall and gates (ID 82346) (Grade II*). The Church of St Paul (ID 21498) (Grade II) is also located just outside the most western boundary of the centre. All three listed buildings are located within the Newbridge Conservation Area.

Nelson Local Centre

Nelson Local Centre is a small local centre which serves the community of Nelson. The local centre is designated by Policy SP4 of the LDP as a local centre and is identified as being located within the Northern Connections Corridor. The centre comprises 46 commercial units. There are limited vacancies within the centre (two), which appear to be vacant retail/services uses. This represents a vacancy rate of 4.3%.

The centre has a reasonable convenience goods offer with two general convenience stores (Premier Store Nelson and The Co-Operative), a greengrocer, also selling some pet supplies (Bob's Fruit & Veg and Pet Supplies) and a tobacconist (The Vapor Den). The centre also has a reasonable comparison goods offer for a centre of its size, which includes, a personalised clothing and gifts shop (Green Monkey Personalised T-Shirts & Gifts), a builders merchant (Wellington Stores Building Merchants), a baby clothing and accessories shop (Bizzie Lizzie Baby Boutique & Accessories), a pharmacy (Sheppards Pharmacy) and a florist (The Cottage Garden Florist). The pharmacy provides an important function locally.

The other uses within the local centre include: eight service uses including five hairdressers, a Post Office, an undertaker and a kitchen showroom; three financial services including a solicitors office, an estate agent's office and a betting office; a cafe; four public houses; seven hot food takeaways; three children's nurseries; a dental surgery; a guest house; a library and a community hall; a car sales and showroom; a car services unit; a pet grooming parlour, an electrical contractor and an holistic services wellness centre including facilities such as tattoos and piercings, sunbeds, barbers, hair & beauty and a thai spa. The Calfaria Baptist Church is also located just outside of the centre.

There are two free car parks located within the local centre – Dynevor Terrace Car Park consisting of approximately 37 spaces (including two disabled car parking spaces and four electric vehicular charging points), short stay car parking along Market Close consisting of approximately 16 spaces (1 hour on Monday – Saturday between 8am – 6pm). There is also unrestricted on-street car parking as well as informal street parking scattered throughout the centre and along streets adjoining the centre.

The centre is served by bus services 7, C1, C16, S79, X38 and 78. Services 7, C16 and X38 provide links with Caerphilly Town Centre (Interchange and Interchange – Stand 9), Ystrad Mynach Town Centre (Central Café – Stop A, Siloh Chapel – Stop C, Tesco Car Park – Stop N and The Beech Tree), Blackwood Town Centre (Interchange and Interchange – Stand 5) and Bargoed Town Centre (Hanbury Square – Stop A, Interchange and Interchange – Stand 5).

There is not a train station provided in Nelson Local Centre. The nearest Train Station is Quakers Yard Train Station located approximately 2.8km to the northwest and provides services to Barry Island, Merthyr Tydfil, Bridgend and Cardiff.

Pedestrian accessibility within the centre was good - a number of dropped kerbs, three pedestrian crossings are provided within the centre (two zebra crossings and one pelican crossing) and generally good quality paving and pathways were provided. The vast majority of the centre was flat in nature, making it easy to walk.

The centre's built form appears to consist of a mixture of dated and historic buildings, which were generally in good condition. A few shops throughout the centre appear to have been refurbished. The centre was well-kept, clean and free of litter (bins scattered throughout the centre) with street lighting and CCTV cameras provided throughout. There is a designated hard surface and walled amenity area located along Commercial Street/Shingrig Road towards the north of the centre, which appears to be available to use for ball games. Landscaping, public art and public seating were also located within the centre of the centre on and around the roundabout connecting Dynevor Terrace, Commercial Street and Wern Crescent.

A section of the centre, towards the north along Commercial Street, is included within the Nelson Conservation Area. There are also two listed buildings located within the centre e.g. Handball Court (ID 13574) (Grade II) and War Memorial (ID 24826) (Grade II). Both listed buildings are located within the Nelson Conservation Area.

Rhymney Local Centre

Rhymney Local Centre is a small local centre which serves the community of Rhymney. The local centre is designated by Policy SP4 of the LDP as a local centre and is identified as being located within the Heads of the Valleys Regeneration Area. The centre comprises 30 commercial units. The centre includes seven vacant units, four of which appeared to be vacant retail/service uses and one appeared to be a vacant bank. This represents a vacancy rate of 23.3% which is high and significantly above the borough and UK average.

The centre has a good convenience goods offer with four general convenience stores (Nisa Local, LifeStyle Express, Kaler Food & Wine and Family Shopper) and a sandwich shop (Rock and Rolls). Whilst the comparison goods offer is limited to a personalised clothing shop (Print Shop – Design & Print) and a charity shop, which occupies two units within the centre (Helping Hands Second Hand Shop).

The other uses within the local centre include: five service uses including three hairdressers, a Post Office and a computer services use; a solicitors office; a public house; a social club; three hot food takeaways; two community halls including the Hafod Deg Resource Centre and the Rhymney/St David's Community and Healthy Living Centre; and a hair and beauty salon.

No car parks were located within the local centre. There is however a free car park with approximately 23 car parking spaces located adjacent to the Rhymney Train Station (Rhymney Station Park and Ride). The Rhymney Station Park and Ride and Rhymney Train Station are located within approximately 300m from the centre. There is also short term on-street car parking within the centre (30 minutes on Monday – Saturday between 8am – 6pm). There is also informal street parking scattered throughout the centre and along streets adjoining the centre.

The centre is served by bus services 1, 2, 3, 4A and 4C – services 1, 2 and 3 provide links with Bargoed Town Centre (Hanbury Square – Stop A and Bargoed Interchange – Stand 1). Each of the services is available once an hour (approx.).

Pedestrian accessibility within the centre was good - a number of dropped kerbs and a pedestrian (zebra) crossing were provided. The quality of the street paving could be improved – there were a number of cracks present. The pavements were also fairly narrow in some locations, making it difficult to pass people, but it also widened up in a number of other locations throughout the centre as well, which made passing pedestrians easier. The centre was flat in nature, making it easy to walk.

The centre's built form appears to consist of a mixture of dated and historic buildings, which were generally in poor condition. Street lighting and CCTV cameras were provided throughout the centre. Litter was scattered throughout and only a few litter bins appeared to be provided. The centre also lacked any open space or landscaping.

The centre is included within the Rhymney Conservation Area. There are no listed buildings within the centre but there are a number of listed buildings located in close proximity to the southern centre boundary e.g. War Memorial (ID 25180) (Grade II), The Vicarage (ID 25184) (Grade II), Nos 1 and 2 The Lawn (ID 25183) (Grade II) and Ysgol Lawnt (ID 25185) (Grade II). All of these listed buildings are located within the Rhymney Conservation Area.

Bedwas Local Centre

Bedwas Local Centre is a small local centre which serves the community of Bedwas. The local centre is designated by Policy SP4 of the LDP as a local centre and is identified as being located within the Southern Connections Corridor. The centre comprises 28 commercial units. There are limited vacancies within the centre (three), two of which include a vacant public house and betting office. This represents a vacancy rate of 10.7%.

The centre has a fairly good convenience goods offer with two general convenience stores (The Co-Operative, Bedwas General Store & Newsagents) and a butcher (Buckland's Family Butchers). Whilst the comparison goods offer is limited to a card and stationery store (Cards for all Occasions), a gift shop (The Rock/Y Graig Gift Shop) and a pharmacy (Well Pharmacy Bedwas). The pharmacy does however provide an important function locally.

The other uses within the local centre include: five service uses including four hairdressers and a Post Office; three cafes; a bar and a public house; three hot food takeaways; three medical services including a chiropractic surgery, dental surgery and doctors surgery; one cosmetic surgery; one tattoo studio; the Bedwas Police Station; Bedwas Junior School; and two churches (Bethel Baptist Church and Bedwas Methodist Church).

There are three free car parks located within the local centre - Church Street Car Park consisting of approximately 11 spaces (including one disabled car parking space), Bridgend Inn Car Park consisting of approximately 27 spaces (including two disabled car parking spaces) and The Co-Operative Car Park consisting of approximately 10 spaces (including one disabled car parking space). There is very short term on-street car parking within the centre (15 minutes on Monday – Saturday between 8am – 6pm). There is also informal street parking scattered throughout the centre and along streets adjoining the centre.

The centre is served by bus services A and H that provide links with Caerphilly Town Centre (Caerphilly Library Bus Stop).

There is no train station in Bedwas Local Centre. The nearest Train Station is Energlyn & Churchill Park Train Station located approximately 2.3km to the southwest and provides services to Bargoed, Rhymney, Ystrad Mynach, Penarth and Cardiff.

Pedestrian accessibility within the centre was good - a number of dropped kerbs, a pedestrian (zebra) crossing towards the north of the centre and good quality paving was provided. The pavements were relatively narrow in some locations, making it difficult to pass people, but it also widened up in a number of others locations throughout the centre as well, which made passing pedestrians easier. The centre was flat in nature, making it easy to walk.

The centre's built form appears to consist of a mixture of dated and historic buildings, which were generally in good condition. There are two listed buildings located towards the southern boundary of the centre e.g. Bedwas Balti Restaurant, The Indian Cottage and Bridge Cottage (ID 13563) (Grade II) and The White Hart Inn (ID 21312) (Grade II). The centre was well-kept, clean and free of litter (bins scattered throughout the centre) with street lighting provided throughout. There did however appear to be a lack of CCTV cameras provided within the centre.

Appendix 6 : Venuescore Centre Ranks

Table 7.10 Venuescore Ranking of Centres 2017

Centre	Local Authority	Location Grade	Venuescore	Rank	Market Position Classification
Cardiff, Centre	Cardiff	Major City	516	6	Upper Middle
Newport (Gwent), Centre	Newport	Regional	176	107	Middle
Cwmbran, Centre	Torfaen	Regional	145	156	Lower Middle
Cardiff, Newport Rd	Cardiff	Major District	69	408	Middle
Bridgend, Centre	Bridgend	Major District	66	433	Lower Middle
Abergavenny, Centre	Monmouthshire	Major District	62	473	Middle
Merthyr Tydfil, Centre	Merthyr Tydfil	Major District	60	492	0
Caerphilly, Centre	Caerphilly	Major District	59	500	Lower Middle
Cardiff, Roath	Cardiff	Major District	57	520	Middle
Aberdare, Centre	Rhondda, Cynon, Taff	Major District	57	520	0
Monmouth, Centre	Monmouthshire	Major District	54	558	Middle
Cardiff, Culverhouse Cross	The Vale of Glamorgan	Major District	51	592	Middle
Pontypridd, Centre	Rhondda, Cynon, Taff	Major District	50	608	Lower Middle
Barry, Centre	The Vale of Glamorgan	District	48	633	0
Maesteg, Centre	Bridgend	District	39	799	0
Chepstow, Centre	Monmouthshire	District	38	819	Middle
Blackwood, Centre	Caerphilly	District	37	847	0
Cardiff, Canton	Cardiff	District	35	912	Lower Middle
Cardiff, Cardiff Bay	Cardiff	District	35	912	Upper Middle
Pontypool, Centre	Torfaen	District	34	937	0
Ebbw Vale, Centre	Blaenau Gwent	District	33	968	0
Penarth, Centre	The Vale of Glamorgan	District	30	1074	Middle
Cowbridge, Centre	The Vale of Glamorgan	Minor District	25	1276	Upper Middle
Bargoed, Centre	Caerphilly	Minor District	21	1481	0
Abertillery, Centre	Blaenau Gwent	Minor District	20	1559	Lower Middle
Porthcawl, Centre	Bridgend	Minor District	20	1559	Lower Middle
Cardiff, Whitchurch	Cardiff	Local	18	1696	Middle
Tonypandy, Centre	Rhondda, Cynon, Taff	Local	18	1696	n/a
Hengoed, Ystrad Mynach	Caerphilly	Local	17	1775	Lower Middle
Newport (Gwent), Spytty Rd	Newport	Local	17	1775	Lower Middle
Ebbw Vale, Beaufort Rd	Blaenau Gwent	Local	16	1888	Middle
Treorchy, Centre	Rhondda, Cynon, Taff	Local	16	1888	Lower Middle
Cardiff, Cathays	Cardiff	Local	15	2021	Middle
Cardiff, Coryton	Cardiff	Local	15	2021	Lower Middle

Centre	Local Authority	Location Grade	Venuescore	Rank	Market Position Classification
Cardiff, Ferry Rd	Cardiff	Local	15	2021	Upper Middle
Cardiff, Grangetown	Cardiff	Local	15	2021	Middle
Tredegar, Centre	Blaenau Gwent	Local	14	2171	n/a
Cardiff, Llanrumney	Cardiff	Local	14	2171	n/a
Porth, Centre	Rhondda, Cynon, Taff	Local	14	2171	n/a
Cardiff, Ashbourn Way/Ty Glas	Cardiff	Local	13	2377	Middle
Cardiff, Olympian Dr	Cardiff	Local	13	2377	Lower Middle
Penarth, Penrath Haven	The Vale of Glamorgan	Local	13	2377	Middle
Cardiff, Pengam Rd	Cardiff	Local	12	2566	Lower Middle
Bridgend, Newcastle	Bridgend	Local	11	2815	Middle
Caerphilly, Energlyn	Caerphilly	Local	11	2815	n/a
Cardiff, Salisbury Rd	Cardiff	Local	11	2815	Middle
Merthyr Tydfil, Dowlais	Merthyr Tydfil	Local	11	2815	n/a
Caldicot, Woodstock Way	Monmouthshire	Local	11	2815	Middle
Newport (Gwent), Duffryn	Newport	Local	11	2815	n/a
Newport (Gwent), Malpas	Newport	Local	11	2815	Middle
Newport (Gwent), Rogerstone	Newport	Local	11	2815	Middle
Barry, Ffordd Y Mileniwm	The Vale of Glamorgan	Local	11	2815	n/a
Barry, Palmerstown	The Vale of Glamorgan	Local	11	2815	Upper Middle
Ebbw Vale, North West Approach	Blaenau Gwent	Local	10	3133	Lower Middle
Bridgend, Coychurch Rd	Bridgend	Local	10	3133	Middle
Bridgend, Pencoed	Bridgend	Local	10	3133	Lower Middle
Caerphilly, Castle View/ Nantgarw Rd	Caerphilly	Local	10	3133	Middle
Newport (Gwent), Orb Dr	Newport	Local	10	3133	Upper Middle
Mountain Ash, Centre	Rhondda, Cynon, Taff	Local	10	3133	Lower Middle
Tonypandy, Llwynypia Rd	Rhondda, Cynon, Taff	Local	10	3133	Middle

Source: Javelin's Venuescore 2017

Celebrating

60

years

Birmingham
0121 713 1530
birmingham@lichfields.uk

Bristol
0117 403 1980
bristol@lichfields.uk

Cardiff
029 2043 5880
cardiff@lichfields.uk

Edinburgh
0131 285 0670
edinburgh@lichfields.uk

Leeds
0113 397 1397
leeds@lichfields.uk

London
020 7837 4477
london@lichfields.uk

Manchester
0161 837 6130
manchester@lichfields.uk

Newcastle
0191 261 5685
newcastle@lichfields.uk

Thames Valley
0118 334 1920
thamesvalley@lichfields.uk

@LichfieldsUK

lichfields.uk