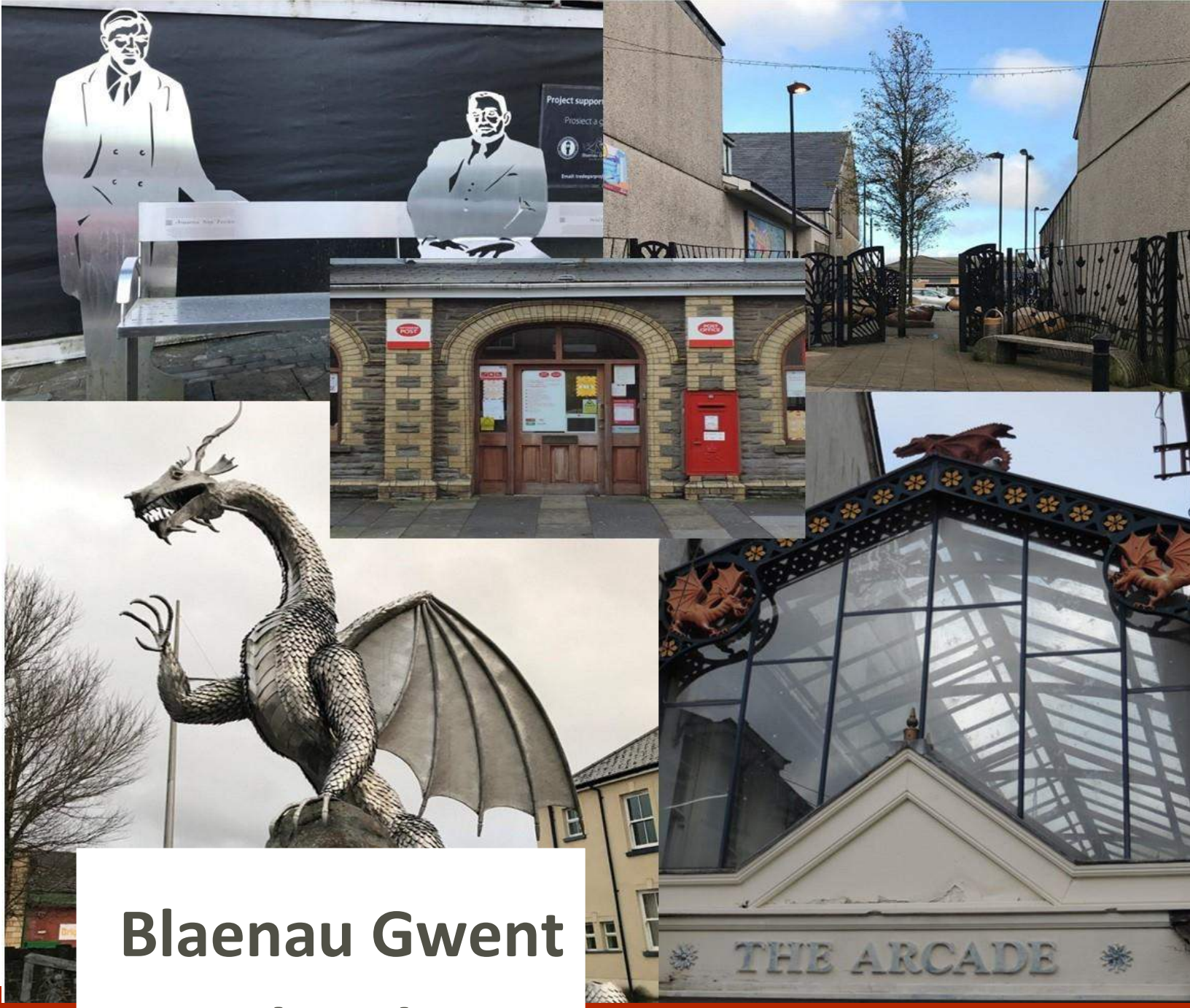


Blaenau Gwent Retail and Leisure Study

April 2021

Prepared by:
Reeves Retail Planning Consultancy and
Williams Gallagher

WILLIAMS.
GALLAGHER.

Reeves Retail
Planning Consultancy

Table of Contents

Executive Summary

1. Introduction 1

The Brief 1

Report Structure 2

2. Planning Policy Framework 3

Planning Policy Wales 3

Technical Advice Note 4 Retail and Commercial Development 5

Other National Policy Guidance 5

The Local Development Plan 6

The Replacement Local Development Plan 8

Planning Policy Conclusions 9

3. Retail and Town Centre Trends 10

Position in 2012 10

Position in 2017 11

Position in 2020 11

Food and Beverage Uses 16

Other Commercial Town Centre Uses 18

Residential Uses in Town Centres 18

Conclusions 18

4. Retail Offer and Shopping Patterns in Blaenau Gwent 20

Background 20

Retail Hierarchy 20

Retail Provision 21

Household Survey – Shopping Patterns and Customer Views 23

5. Town Centre Health Checks 46

Ebbw Vale 46

Abertillery 47

Brynmawr 48

Tredegar 48

Blaina 49

Overall Conclusions on Town Centre Health 50

6. Retail Capacity – Quantitative Assessment and Qualitative Need 51

Household Survey 51

Convenience and Comparison Capacity for Retail Floorspace 51

Qualitative Retail Needs 56

7. Leisure Uses and Future Capacity 57

Existing Leisure Provision 57

Leisure Trends and Future Capacity / Demand 59

Policy Response 60

8. Review of Existing Retail, Leisure and Town Centre Policies 61

Retail Hierarchy 61

Town Centre Boundaries and Primary Retail Areas 62

Policy Review 71

9. Study Summary and Conclusions 79

Current Shopping provision and Patterns 80

Health of the Centres 80

Retail Capacity and Need 82

Commercial Leisure Requirements 82

Retail Policy Recommendations 83

Appendix 1 **Household Survey Study Area and Questionnaire**

Appendix 2 **Household Survey Results (Weighted)**

Appendix 3 **Heath Check – Ebbw Vale**

Appendix 4 **Heath Check - Abertillery**

Appendix 5 **Heath Check - Brynmawr**

Appendix 6 **Heath Check - Tredegar**

Appendix 7 **Heath Check - Blaina**

Appendix 8 **Quantitative Capacity Assessment**

Executive Summary

1) This study has been prepared jointly by Reeves Retail Planning Consultancy (RRPC) and Williams Gallagher (WG) on the instructions of Blaenau Gwent County Borough Council (BGCBC).

2) Its purpose is to provide an updated evidence base to inform the retail and town centre leisure strategy in the Replacement Local Development Plan (RLDP) which the Council is in the process of preparing.

3) The study is based on new primary data, namely:

   - A household survey undertaken by NEMS Market Research in June / July 2020. A total of 637 interviews were undertaken across 6 zones that reflect the settlement distribution within the County Borough area. The survey collected information on current shopping behaviour for food and non-food purchases, as well as information on how the town, district and local centres are used and respondents' views of the offer currently provided in the Blaenau Gwent town centres. Given the timing of the survey it also included questions on how shopping behaviour had been affected by the Covid-19 pandemic and specifically the first lockdown; and

   - Health checks for Ebbw Vale, Abertillery, Brynmawr, Tredegar and Blaina, utilising the Council's annual town centre surveys and the household survey, as well as other data sources and evidence from site visits.

4) National trends relating to retailing and the changes being experienced in town centres, the food and beverage sector and other town centre uses have also been considered, along with the quantitative and qualitative capacity for additional convenience and comparison floorspace in Blaenau Gwent.

5) The study also considers the current provision of leisure uses within the defined centres and provides commentary on future capacity and demand.

6) The key outputs of the study comprise:

   - A quantitative and qualitative assessment of the need for additional convenience and comparison provision during the plan period to 2033;

   - An assessment of the current health of the main Blaenau Gwent town centres and their strengths, weaknesses, opportunities and threats (SWOT analysis);

   - A review of the commercial leisure provision within the town centres, including existing provision, patterns of usage and future needs;

   - Recommendations on the retail hierarchy in the area;

   - A review of the town centre boundaries and Primary Shopping Areas as currently defined; and

   - Recommendations on how the current retail and town centre policies of the Local Development Plan could be updated to ensure they provide sufficient guidance and flexibility to meet the requirements set out in national planning policy.

Retail Capacity

7) This study has been undertaken at a time when many town centres and traditional high streets nationally are struggling to evolve quickly enough to adapt to the significant and fast-moving structural changes that have been seen in the retail sector since the economic recession. These include changes in shopping habits, the demise of many traditional retailers, ongoing competition from out of centre retailers and the growing use of online shopping for an increasing range of retail goods and some services.

8) More recently all retail and other town centre businesses have faced the challenges of the Covid-19 pandemic. The full impact of the latter is currently unknown, but experience to date suggests that the significant decline in the demand for retail floorspace in all centres will continue, resulting in increasing vacancies and limited demand from new occupiers.

9) It is also possible that the increased importance of 'local' shopping seen during the pandemic lockdowns may benefit the Blaenau Gwent centres, with shopping previously being undertaken in the larger centres being replaced by a combination of online and local shopping. However, centres still need to adapt if they are to survive and thrive. There will need to be a decreasing reliance on retail uses in the future and retail floorspace needs to be replaced by a greater mix of uses and draws.

10) This decreasing demand for retail provision is reflected in the findings of the quantitative retail capacity assessment for Blaenau Gwent which indicates no quantitative capacity for new retail floorspace during the Plan period to 2033.

11) This is based on the assumption that current town centres and out of centre provision maintain their current market shares (as evidenced by the 2020 household survey) and expected population growth based on past trends.

12) This, purely quantitative assessment, suggests that there is already more than sufficient retail comparison floorspace within the County Borough to meet identified needs during the plan period. For convenience floorspace this reflects the combined effect of limited changes in overall convenience expenditure, declining spend in physical shops and the considerable capacity for existing stores to improve their performance (sales efficiencies) in the future.

13) For comparison goods, growth in comparison expenditure will be greater during the plan period, despite the greater proportion of spend being made online. However, the potential and need for existing retailers to improve their performance is greater, if such businesses are to remain profitable as business costs increase.

Table A8.28: Convenience Capacity - Blaenau Gwent (Base excluding Commitments)

		2018	2020	2025	2030	2033
Total Available Convenience Expenditure in Study Area (£m)	(a)	£136.68	£143.00	£134.01	£131.57	£130.32
Current Market share of Convenience destinations in study area	(b)	89.9%	89.9%	89.9%	89.9%	89.9%
Available Convenience Expenditure for destinations in study area	(c)	£122.93	£128.62	£120.53	£118.34	£117.22
Change in available spend to study area destinations (cumulative from 2018)	(d)		£5.68	-£2.40	-£4.59	-£5.72
Turnover of Convenience destinations (assuming no change in provision or sales efficiences)	(e)	£122.94	£122.94	£122.94	£122.94	£122.94
Turnover of Convenience destinations (allowing for changes in sales efficiences)	(f)	£122.94	£126.99	£122.84	£124.690	£125.816
Residual Convenience spend to support new convenience floorspace (cumulative) (£m)	**(g)**		£1.63	-£2.31	-£6.35	-£8.60
Benchmark Sales density for Convenience Floorspace (£ per sqm)	(h)		£9,812	£9,482	£9,736	£9,736
Amount of new convenience floorspace required (cumulative) (sqm net)	**(j)**		**166**	**-243**	**-652**	**-883**

Table A8.29 : Comparison Capacity - Blaenau Gwent (Base excluding Commitments)

		2018	2020	2025	2030	2035
Total Available Comparison Expenditure in Study Area	(a)	£149.33	£131.90	£155.60	£172.21	£183.88
Current Market share of Comparison destinations in study area	(b)	46.0%	46.0%	46.0%	46.0%	46.0%
Available Comparison Expenditure for destinations in study area	(c)	£68.67	£60.66	£71.56	£79.20	£84.56
Change in available spend to study area destinations (cumulative)	(d)		-£8.02	£2.88	£10.52	£15.89
Turnover of Comparison destinations (assuming no change in provision or sales efficiences)	(e)	£68.68	£68.68	£68.68	£68.68	£68.68
Turnover of Comparison destinations (allowing for changes in sales efficiences)	(f)	£68.68	£61.41	£74.48	£85.42	£93.07
Residual Comparison spend to support new comparison floorspace (cumulative)	**(g)**		**-£0.75**	**-£2.92**	**-£6.23**	**-£8.51**
Benchmark Sales density for Comparison Floorspace (£ per sqm)	(h)		£4,450	£5,410	£6,971	£6,971
Amount of new comparison floorspace required (cumulative) (sqm net)	**(i)**		**-169**	**-540**	**-893**	**-1,221**

14) These findings are consistent with recent experience in the County Borough, which has seen few of the committed retail proposals or allocations brought forward during the current LDP period and the decline in retail, particularly comparison, provision in town centres.

15) It should also be noted that the above figures exclude any committed retail schemes (i.e. those with planning permission) or sites that are allocated in the Local Plan. In practice, the only scheme now expected to come forward is the development of the NMC Factory and Bus Depot site in Brynmawr. Other commitments are not expected to come forward and there is no capacity requirement to retain previous retail allocations in the Replacement LDP.

Leisure Uses and Other Town Centre Uses

16) Leisure uses have always been an important element of a town centre offer but their relative significance has increased in recent years, as spend on eating out and other leisure activities has increased, whilst spending at shops in town centres has declined at least in relative terms.

17) The existing leisure offer in Blaenau Gwent's town centres is mainly related to the Food and Drink sector (Use Class A3) and is an important element of the overall offer as such uses make up a considerable proportion of the existing occupiers and floorspace. However, provision in the Blaenau Gwent centres is generally below the UK average. Only Abertillery is (marginally) above, whilst provision in Ebbw Vale is particularly low.

18) The difference in offer is more pronounced when the type of food and drink provision is considered. Blaenau Gwent centres have very high levels of fast food & takeaway provision, in most cases more than double the UK average in terms of the number of units. There is also a higher provision of cafes but very low 'restaurant' provision.

19) The quantitative capacity for other town centre uses including leisure uses is more difficult to assess than for retail, given the wide variety of other uses that the term can be applied to and the lack of reliable data to indicate what may be an appropriate level of provision in a particular centre or area.

20) However, there are many uses that are or could be accommodated in the Blaenau Gwent town centres and where the available expenditure locally is significant. Examples include a possible £25.25m available for spending on restaurant and café meals, £11.47m for alcoholic drinks (consumed away from home) and a total of £19.72m for takeaway meals and snacks.

21) With leisure spend overall expected to increase by between 0.9% and 2.9% per annum from 2023 onwards, and by considerably more than that in 2021 and 2022 after the sharp decline in 2020, it is clear that the role of leisure and retail services within town centres will continue to be important during the plan period. Further, given that the majority of services and leisure activities require a physical presence at the business location, the uses can contribute to the vitality of a town centre.

22) There would also appear to be a qualitative need to improve the mix of A3 uses within the Blaenau Gwent centres to better reflect the expenditure available to spend on eating out in cafes / restaurants compared with fast food & takeaways. The former uses also support the vitality of town centres to a greater extent than fast food and takeaway uses as they are both more likely to be open at the same time as the retail uses ie during the daytime trading hours, and have greater potential to increase the dwell-time of visitors.

Town Centre Health Checks and Boundary Recommendations

23) The Retail Hierarchy in Blaenau Gwent currently defines Ebbw Vale as a Principal Town Centre with a sub-regional role and Abertillery, Brynmawr and Tredegar as District Town Centres. Blaina is defined as a Local Town Centre. Below Blaina are a number of neighbourhood centres.

24) This offer is complemented by the out of town retail provision in the County Borough, which for convenience provision comprises Tesco and Morrison's in Ebbw Vale; Asda at Lakeside Retail Park,

Brynmawr and Tesco in Abertillery. The main comparison provision is at Lakeside Retail Park in Brynmawr and the B&M Home store at Rhyd y Blew Retail Park, Ebbw Vale. Until mid-2020 there was also a major comparison offer at the Festival Shopping Outlet Centre in Ebbw Vale.

25) A review of the health of these centres has been undertaken, informed by the annual town centre occupancy surveys conducted by BGCBC, the 2020 household survey, site visits and national data. The findings have then been used to inform our recommendations on the updates required to current retail, leisure and town centre planning policies to ensure they reflect the current and future needs of the centres and enable the Council to support the objectives of:

- Promoting viable urban and rural retail and commercial centres, as the most sustainable locations to live, work, shop, socialise and conduct business;
- Sustaining and enhancing retail and commercial centres' vibrancy, viability and attractiveness; and
- Improving access to, and within retail and commercial centres, by all modes of transport, prioritising walking, cycling and public transport (PPW, para 4.3.3).

Ebbw Vale

26) Ebbw Vale is the largest town centre in Blaenau Gwent, both in terms of the total floorspace provided within the centre and the retail (Use Class A1) provision, and it is focused on the historic Bethcar Street / Market Street area which run north /south parallel to the A4046. These streets provide mainly small retail units in older shop units, although more modern mixed use development has occurred to the north, where the centre's main multi-storey car park is located as part of the Ebbw Vale Shopping Centre development.

27) Larger, more modern retail units are also provided centrally within the vicinity of The Walk and include several units occupied by national comparison retailers, a McDonalds and an Aldi store. All are served by surface car parking. These units and the closest units on Bethcar Street form the Primary Retail Area (PRA) where the main comparison offer is located.

28) The main convenience offer is also located in The Walk area, with Iceland being within the PRA and Aldi being just outside but within the defined town centre.

29) The centre also includes a number of banks and financial services, library and a public house in the former Picture House. These provide additional services in the northern parts of the centre.

30) The good convenience and comparison offer and below average vacancies suggests Ebbw Vale is a generally healthy town centre. The streetscape along Bethcar and Market Streets is generally of a high quality and the buildings are relatively well maintained. The centre has a higher proportion of national multiples than the other centres in Blaenau Gwent but is unable to provide the same offer as either Cwmbran town centre or Cyfarthfa Retail Park in Merthyr Tydfil. Despite this we consider that designation of Ebbw Vale as the Principal Town Centre within BGCBC remains appropriate.

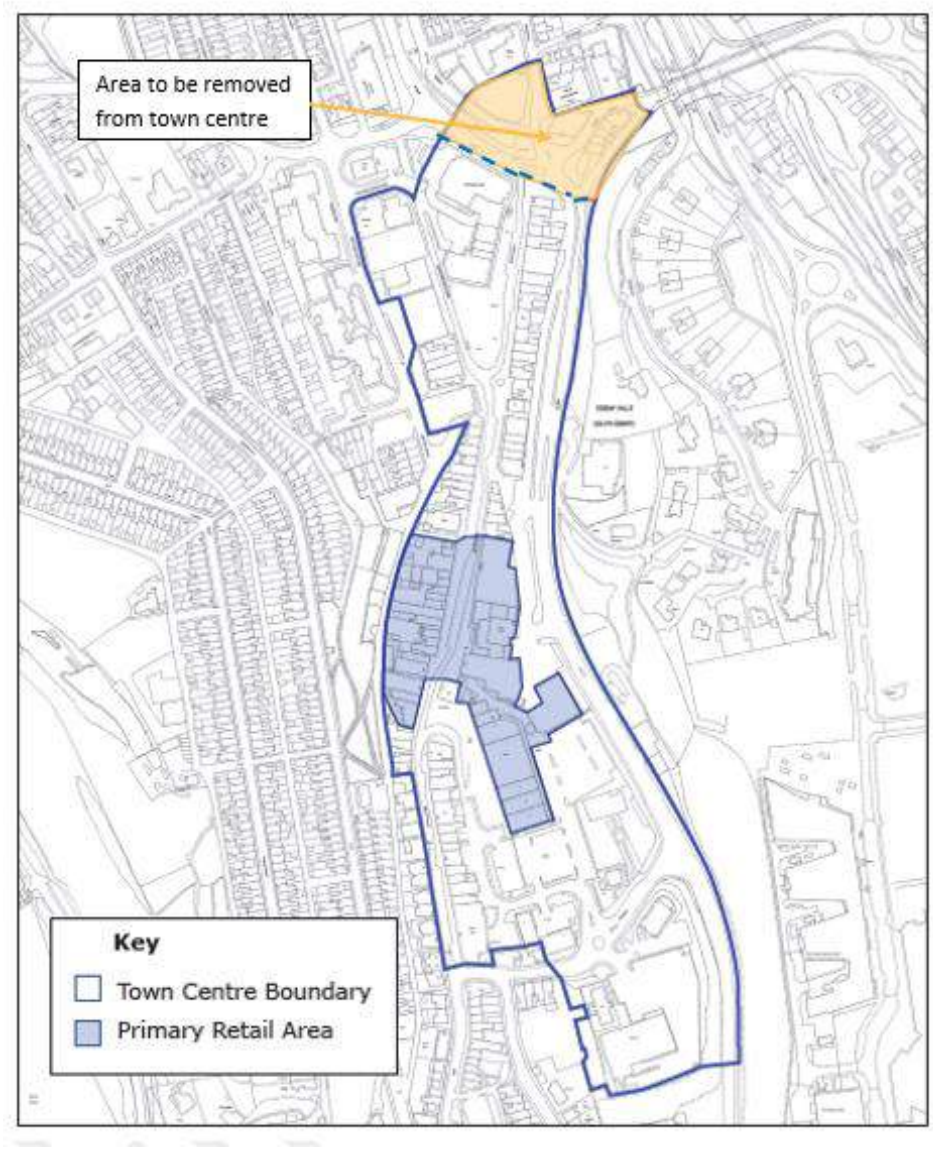
31) However, any further losses of retailers within The Walk have the potential to reduce the draw through this area weakening the potential for linked shopping trips from Aldi, a key draw to the centre, and there

would appear to be limited demand for new retailers to come to the town. This is evidenced by previously allocated sites in Ebbw Vale not having come forward for retail development.

32) Vacancy rates are not particularly high however, and we therefore consider that the current town centre boundary remains largely appropriate. Our only suggestion would be that the area north of the A4046 could be removed from the centre as it does not currently contribute to the health of the town centre and is physically separated from it.

33) The PRA in Ebbw Vale comprises the modern retail units to the south of the centre and the smaller, older units to the west of Bethcar Street. This is considered to remain appropriate going forward as it contains the larger units most likely to appeal to retailers in the future. The defined area also includes smaller units more likely to appeal to independents.

34) We therefore recommend that the PRA is retained as currently defined.



Abertillery

35) The defined town centre for Abertillery comprises two distinct areas, with the Primary Retail Area (PRA) covering Church Street and including a range of historic and more recent retail units. The northernmost properties adjoining Division Street / Foundry Bridge include the recently refurbished former Trinity Church and the entrance to the Anvil Court office premises, which has been developed to the rear of the older shop units on the west side of Church Street.

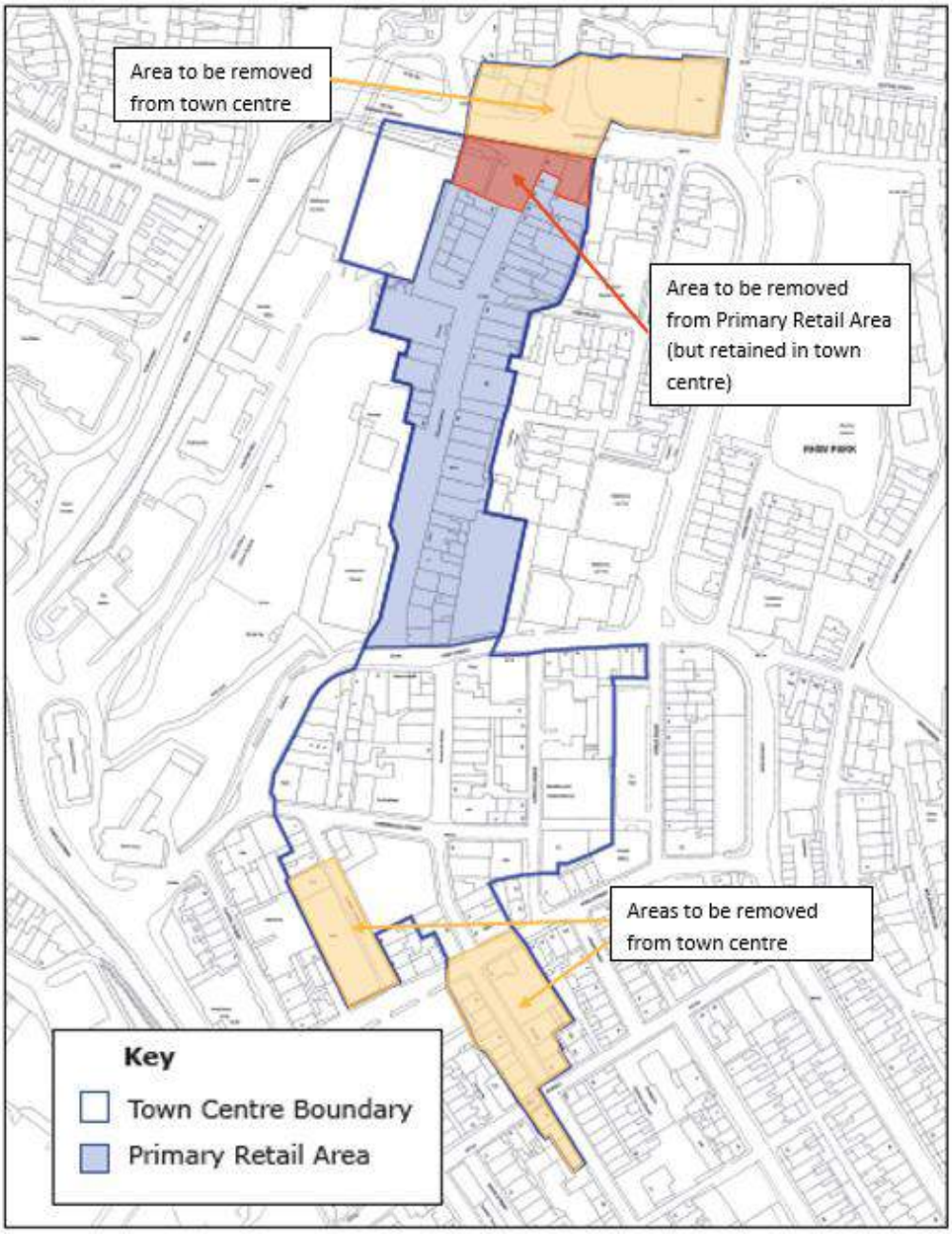
36) The town centre to the south comprises a small area of historic streets (Somerset Street, Market Street and High Street) including the Victorian Arcade and several older buildings of distinct character. The area also includes an Iceland foodstore in a more modern unit and The Met, a community arts, culture and business centre. Immediately adjoining the town centre boundary is the main decked car park for the town centre. Further west and separated from the town centre by changes in levels, are several community and service buildings, including the library. Beyond Castle Street and at a lower level again, is the modern Tesco store and petrol station with its own surface car parking.

37) The centre's retail provision is dominated by independent retailers, with only limited national multiple representation. The centre also has a limited financial services offer and the Post Office has moved from its own unit within Anvil Court to the Premier Store on Foundry Street.

38) Abertillery is a generally healthy and attractive centre that benefits from a good range of uses including employment in Anvil Court and a cultural/community offer at The Met. It is also likely to benefit from the draw of the edge-of-centre Tesco. However, it appears to be oversized for its current role, as evidenced by the number of long term vacancies. The southern part of the town centre includes a number of buildings of character and The Victorian Arcade but lacks a clear role or focus of offer and the environmental quality of the area is poorer, making it less attractive.

39) Therefore, whilst we consider that the designation of Abertillery as a District Town Centres remains appropriate, the level of vacancies and particularly long term vacancies suggests that there is a need to reduce the size of the defined town centre. At present, the proportion of retail and other town centre uses declines south of Commercial Street and particularly south of King Street and removing some of these areas from the town centre is therefore recommended. The continued inclusion of the small number of properties north of Division Street should also be reviewed.

40) The PRA in Abertillery comprises the retail area along Church Street between Foundry Bridge / Division Street in the north and High Street in the south. This remains largely appropriate, but we would suggest that the area at the very north of Church Street is removed, given it does not provide a retail offer.



Brynmawr

41) Brynmawr town centre comprises two distinct areas, the relatively flat and open area around Market Square and the historic linear shopping street of Beaufort Street. The Primary Retail Area (PRA) is identified as the southern half of the latter. This area is dominated by independent retailers and services, the only significant national multiples represented being Lloyds Bank and the Post Office, both in the northern part of the centre.

42) The town centre offer is complemented by Lakeside Retail Park located some 300m (as the crow flies) to the south west of the town centre, which provides large modern retail units for Asda and several

comparison national multiples. These are a major draw to the town, but the linkage to the town centre is not particularly inviting and the proposed redevelopment of the NMC Factory and Bus Depot site has still to be completed.

43) Brynmawr is a generally healthy centre, despite the lack of national multiples and benefits from an attractive Market Place area, where the Market Hall cinema is also located. At the moment the town centre is performing relatively well but it has to be recognised that the centre is unique in that its main retail offer is at the nearby Lakeside Retail Park, outside of both the currently defined town centre and the PRA. As a result, the town centre has a different role and function from what would otherwise be expected, with the emphasis on mixed town centre uses and independent retail provision. However, it remains appropriately defined as a District Town Centre.

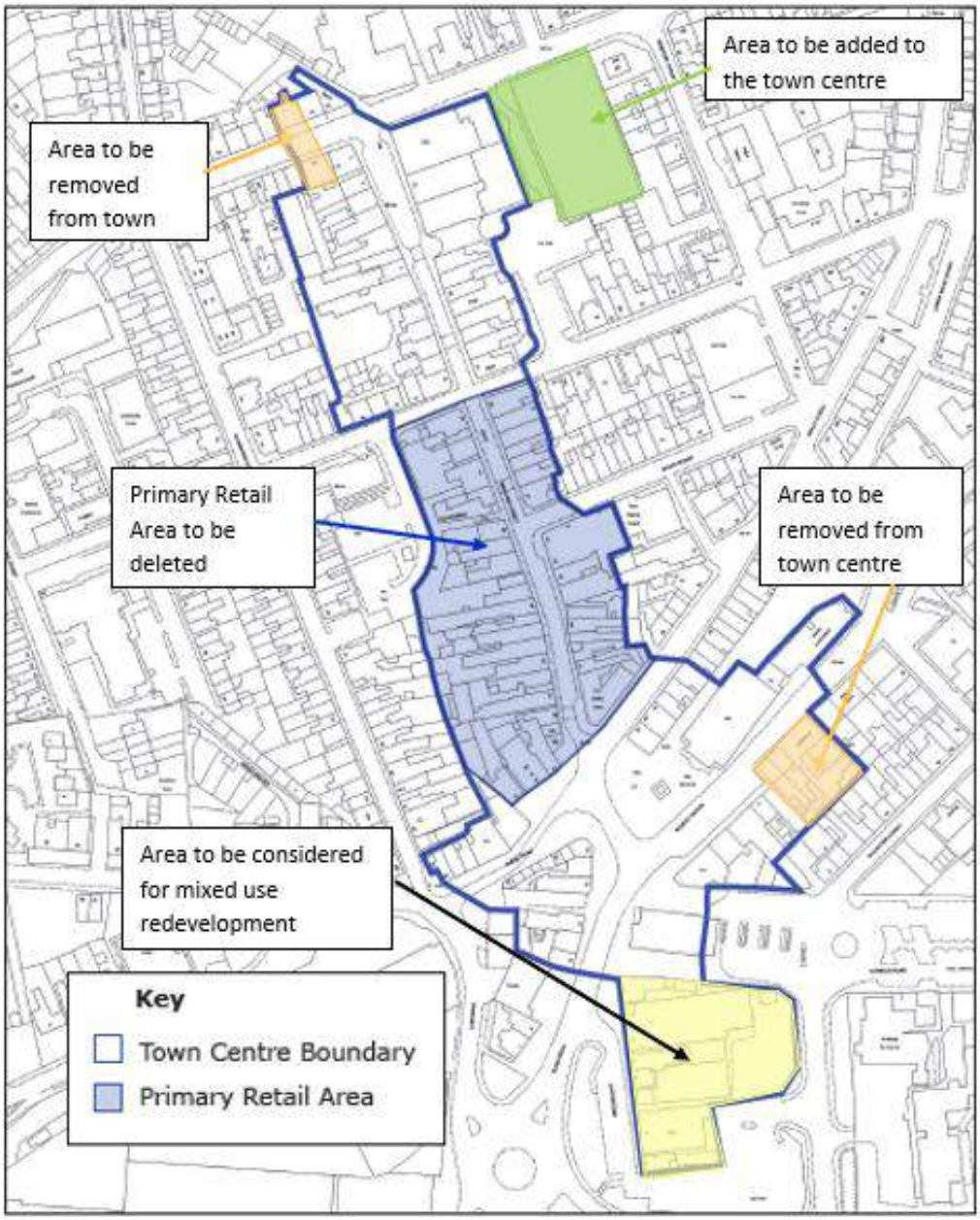
44) The long term success of the centre is likely to depend both on developing this complementary offer and seeking to increase interaction between the town centre and Lakeside Retail Park, given the significant footfall the latter attracts. If successful, this would be particularly beneficial for the area around Market Square, with the demand likely to be for complementary town centre uses.

45) In terms of the town centre boundary, we consider it would be appropriate to extend the town centre northwards to include the recent King Street development comprising One Stop and adjoining unit (proposed for restaurant use) but, with no quantitative or qualitative need to expand the centre, we consider there is potential to encourage other land uses at the northern end of Market Square, by removing a small number of properties from the town centre boundary. A small number of units on the west side of King Street could also be removed.

46) We have also reviewed the current role and future potential of the Station Road Area, which, whilst within the town centre boundary and close to the bus station, provides a different mix of uses to the rest of the town centre. We do not see this changing in the foreseeable future, with the retail emphasis likely to continue to be towards the retail park. However, this area provides a different type and size of property to the rest of the centre and has the potential to accommodate other town centre uses where larger format / footprints are required or a mix of uses is appropriate. Further, such development on this site would offer greater benefit and potential linkage to the rest of the town centre.

47) We therefore recommend that this area is retained within the town centre, but the possibility of allocating it for mixed use redevelopment complementary to the rest of the town centre and the retail park should be explored.

48) Turning now to the PRA in Brynmawr this currently comprises the retail units at southern end of Beaufort Street. This area includes some of the larger retail units in the historic centre but future interest from the national multiples is more likely to centre on the retail park. This part of Beaufort Street no longer provides a different retail offer to the rest of the centre. We would therefore suggest that there is no policy requirement to define a PRA for Brynmawr and the current designation should be deleted.



Tredegar

49) Tredegar town centre is relatively large and has two distinct parts. The northern part is a linear centre running along Commercial Street and is formed of predominantly older shop units occupied by independent businesses. The northern part also includes the modern Gwent Shopping Centre, a precinct development that spans Stockton Way and links to the main surface car park for the centre. This provides larger modern retail units and forms the majority of the Primary Retail Area (PRA) along with the shops on the west side of Commercial Street.

50) The southern part of the centre includes the stretch of Castle Street running south from its junction with Commercial Street to The Circle. This historic area includes the Clock Tower and a number of larger

historic buildings, as well as the modern library complex. The whole area is included within the Tredegar Conservation Area and again, the main occupiers are independent businesses. However, the area also includes the main bank (Barclays) and a number of public houses.

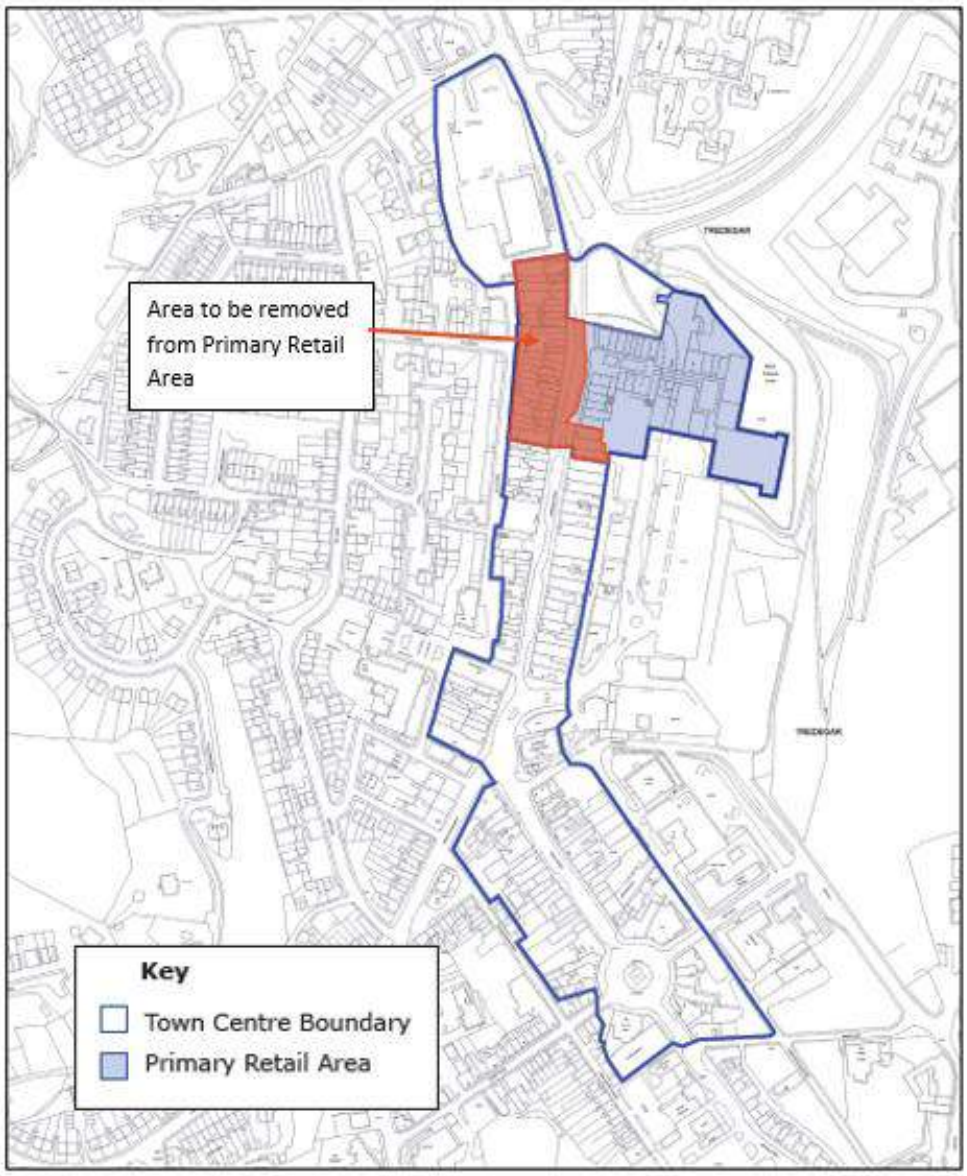
51) Tredegar is a relatively large centre and is generally healthy with average levels of vacancy in terms of floorspace. Its designation as a District Town Centre remains appropriate.

52) However, the location and long term nature of the vacancies, particularly within the Gwent Shopping Centre are a concern and are likely to be weakening the PRA. In contrast there is recent and on-going investment in the southern part of the centre, around The Circle, which appears to be well placed to meet an identified shortfall in leisure services including in the restaurant sector. The challenge will be to integrate the two parts of the centre and potentially reduce the amount of retail floorspace provided whilst maintaining the linkages and flows within the centre.

53) Overall, we consider the centre would benefit from a degree of consolidation, but the northern and southern parts of the centre are both important to its overall health and attractiveness and as such should be retained within the town centre boundary. As a result, we conclude that there is no current requirement to amend the boundary.

54) There is however, a need to consider how the two parts of the centre (Commercial Street and Castle Street) can be better integrated and developed in ways that complement and strengthen the centre as a whole.

55) We also recommend that the PRA is reduced in extent to cover the Gwent Shopping Centre and adjoining areas to consolidate the retail offer in the future.

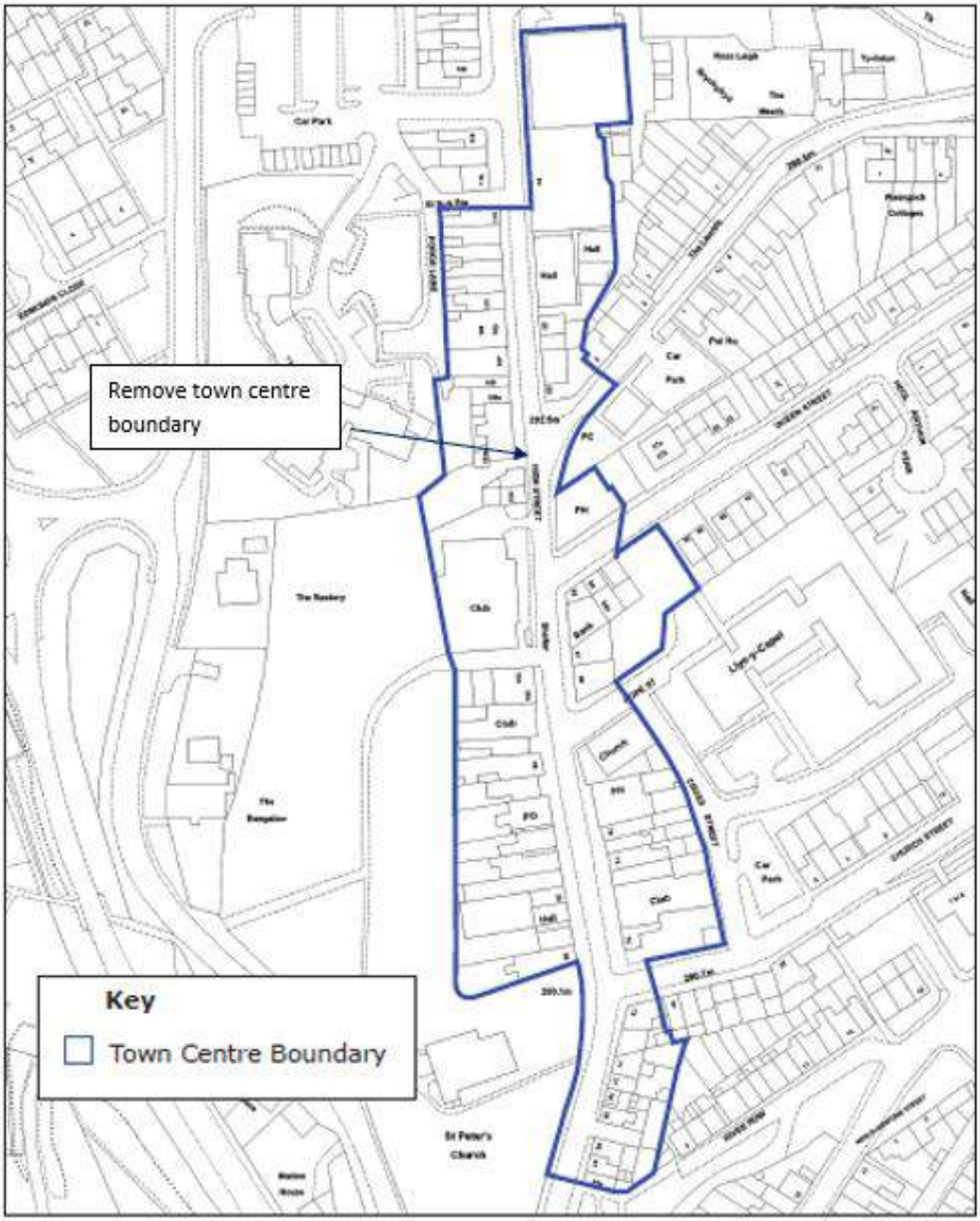


Blaina

56) Blaina is a local centre focused around the High Street and running from the Co-op foodstore in the north to the St Peter's Church area in the south. No Primary Retail Area (PRA) is designated and its retail, service and leisure offer is inter-dispersed with residential development. The centre includes several historic buildings and more modern development. With the exception of the Co-op and the Post Office all the businesses are independents.

57) Blaina is a weak centre in its current form as it contains a large number of vacant units, a considerable proportion of which have been vacant long-term. Several the properties are also in poor condition. The nature of the centre also means that those shops and businesses which are trading well and serving the local community are dispersed throughout the centre, reducing their impact and ability to support each other.

58) Blaina is larger than any of the neighbourhood centres in the Blaenau Gwent area but the nature of the offer and its primary purpose of meeting the needs of its local community is not considered to be significantly different. We would therefore suggest that there is no requirement to distinguish between Blaina and the neighbourhood centres in retail policy terms. A defined town centre boundary is therefore no longer appropriate.



Other LDP Policy Recommendations

59) Having established the retail hierarchy, town centre and Primary Retail Area boundaries which we consider should apply in the future, we have reviewed the current retail and town centre policies. These need to be updated to reflect the current and future needs of the centres.

Policy SP1 Northern Strategy Area – Sustainable Growth and Regeneration

60) Many of the principles set out in this policy remain valid (subject to any separate strategic review) and reflect the existing scale of the town centre offer within the Northern Strategy Area. Whilst there is no quantitative or qualitative need to allocate sites for retail development, it remains appropriate that any major expansion in the future should be focused on Ebbw Vale as the highest order retail / commercial centre in the County Borough.

61) The support for diversification of the economic base through mixed use development in the district hubs of Tredegar and Brynmawr where this supports and reinforces the roles of the town centres also continues to be an appropriate approach, given the important and sustainable role town centres have in providing for the needs of their local communities.

62) However, we would recommend that part (d) of the policy is updated as, whilst the expansion of the roles of town centres may be desirable, we consider that the focus for the district and local town centres should be on serving their local communities. Vibrant town centres that are popular with local residents are considerably more likely to attract tourists than tourism is to make a town centre vital and viable. However, such ambitions can be assisted by ensuring that a sequential approach to development is encouraged for all town centre uses, not just retail, as this improves the overall mix, offer and draw of a centre.

SP1 Northern Strategy Area – Sustainable Growth and Regeneration

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

a) Supporting the creation of a network of sustainable hubs around the principal hub of Ebbw Vale.
b) Promoting Ebbw Vale as the principal hub for Blaenau Gwent, where the majority of social and economic growth will be accommodated including major retail expansion, administrative and cultural developments.
c) Delivering strategic sustainable regeneration flagship schemes at 'The Works' and 'Ebbw Vale Northern Corridor'.
d) Supporting ~~new~~ **and developing the** roles ~~for~~ **of Ebbw Vale and the** district ~~and local~~ town centres **to meet the culture, leisure and tourism needs of their local communities and visitors**.
   - ~~Tredegar District Town Centre will expand its tourism offer through maximising the benefits of local heritage;~~
   - ~~Brynmawr District Town Centre will explore opportunities to develop complementary roles around tourism; and~~
   - ~~Blaina Local Town Centre will build on and exploit its local heritage.~~

e) Enabling diversification of the economic base through mixed-use development in the district hubs of Tredegar and Brynmawr where it supports and reinforces the roles of the town centres.
f) Supporting a major destination attraction that would draw large numbers of people to the area and provide a significant number of jobs.

Policy SP2 Southern Strategy Area - Regeneration

63) The recognition that Abertillery town centre will have an important role in the regeneration of the Southern Strategy Area will continue to be an important policy consideration, as successful town centres are important for economic and social purposes.

64) However, consistent with the comments made regarding Policy SP1, we would suggest the emphasis for future policy should be on developing Abertillery town centre to meet the needs of the local population, rather than focusing on developing complementary roles around culture, leisure and tourism.

65) The household survey has shown that all the major centres in Blaenau Gwent have their own catchment area, and their future success will depend on meeting the needs of the residents within these areas. There will inevitably be a degree of overlap and trade leakage to higher order centres, as these provide more choice and range of goods and services. Improving public transport connections between Abertillery and Ebbw Vale may also result in the latter attracting some of the leakage from the Abertillery area. However, the effectiveness of such an approach will depend on the provision in Ebbw Vale relative to other nearby centres and the ease of access to the alternative offer from Abertillery.

66) For Abertillery, local geography and retail provision will always make Cwmbran an attractive choice for higher order shopping and service trips and, whilst the closure of the FSOC may provide some benefits for Ebbw Vale, reliance should not be placed on securing trade from the Abertillery area.

SP2 Southern Strategy Area – Regeneration

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

a) Ensuring that the district hub of Abertillery is well connected with its hub area, Ebbw Vale and the wider region through safe, frequent and reliable public transport links;
b) Supporting Abertillery District Town Centre in developing **its role as a centre to meet the** ~~complementary roles around~~ culture, leisure and tourism **needs of its local community and visitors**;
c) Delivering 'Activity Tourism' opportunities in the area;
d) Ensuring the removal of dereliction by promoting the reuse of under used and derelict land and buildings;
e) Delivering regeneration schemes which provide residential development and infrastructure; and
f) Building on the unique identity of the area by protecting and enhancing the built heritage and the natural environment.

Policy SP3 The Retail Hierarchy and Vitality and Viability of the Town Centre

67) The principle of protecting existing retail provision in Blaenau Gwent's main town centres remains important and we believe should extend to other uses that benefit the local community, rather than be restricted to retail and local shops.

68) There has been no change in the need to improve town centre vitality and viability and as such the policy basis for this part of Policy SP3 remains. However, we would suggest that (b) should be updated to reflect the importance of other town centre and community uses in addition to retail.

69) Section 3 of Policy SP3 sets out the retail floorspace requirements during the plan period to 2021. This element of the policy is no longer required as there is no requirement to allocate any sites for retail development during the plan period.

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

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

Principal Town Centre

a) Ebbw Vale will perform a sub-regional retail role.

District Town Centres

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

~~Local Town Centre~~

~~c) Blaina will act as a local shopping centre that will be protected and enhanced to provide facilities for the local community.~~

Neighbourhood Centres

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

2) In order to improve the vitality and viability of the town centres:

a) Shops, offices and other commercial premises, where appropriate, will be upgraded by means of refurbishment and redevelopment;

b) Opportunities to improve the retail, **service and leisure** offer will be implemented;

c) The provision of better vehicular access and circulation arrangements, improved public transport facilities and provision of additional car parking spaces will be provided where necessary; and

d) Disabled access and facilities will be improved.

~~3) In order to address local retailing needs, provision for 10,200 sq m of comparison and 2,445 sq m of convenience floorspace is required over the plan period.~~

DM5 Principal and District Town Centre Management

70) This policy, which applies to Ebbw Vale, Abertillery, Brynmawr and Tredegar both defines Primary Retail Areas (PRAs) and sets out the polices which will apply. It also seeks to improve the vitality and viability of the town centres through the refurbishment / redevelopment of existing properties and other opportunities, the provision of better accessibility and circulation arrangements and improved disabled access.

71) However, given the various structural changes that have been seen in the retail sector and shopping behaviour, a policy that rigidly seeks to retain A1 uses in any location, risks increasing vacancies.

72) Thus, whilst retail is an essential component of any town centre and a policy that seeks to protect core areas remains appropriate, it is also important that such areas are not disadvantaged if the demand for retail space is limited.

73) A town centre's vitality and viability can be supported by a range of different uses and their relative importance varies between locations and over time. Indeed, some appropriate town centre uses may not even have been identified at the present time and may emerge as technology or other markets evolve.

74) It is therefore important that the policy response is flexible enough to adapt to changing circumstances, whilst providing appropriate policy guidance.

75) With respect to PRAs it is our view that a policy that seeks to restrict such areas to retail uses only is no longer appropriate, and going forward policies need to balance the preference for retail alongside encouraging other appropriate uses. In this respect, the relevance is less that of the end use but its contribution to town centre vitality and viability, particularly during daytime trading hours.

76) We would suggest Policy DM5 could be updated as follows:

DM5 Principal and District Town Centre Management

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

a) Primary Retail Areas are identified within which **the Council will seek to retain and enhance** ~~only~~ A1 uses ~~will be permitted~~ **whilst seeking a reduction in the number of vacant ground floor commercial uses. Proposals for the change of use, or redevelopment of premises away from retail (Use Class A1) will only be supported where it can be demonstrated that:**

   i. The proposal will contribute to the centre's vitality and viability during daytime trading hours; and

   ii. Proportionate evidence has been provided to demonstrate that the premises are no longer required for retail purposes.

b) <u>Outside of Primary Retail Areas but within the Town Centre boundaries:</u>

   i. A2, **<u>B1, C1</u>**, D1 and D2 uses will be encouraged; ~~outside the Primary Retail Area.~~

ii. **Food and drink uses (Use Class A3) that operate principally during normal daytime trading hours will be encouraged;**

iii. **Other** A3 uses **that principally operate outside daytime trading hours** will not be permitted where they harm the vitality, ~~and~~ viability ~~and retail~~ **or** mix of **uses in** the area as a result of a proliferation of this type of use; **and**

iv. **The change of use of the ground floor units to residential use will be permitted where the use is appropriate and in accordance with other policies within this plan and National Planning Policy. The introduction of residential uses will not be permitted where it will fragment the retail and commercial frontages or impact on the vibrancy and viability of the centre.**

~~c) Within the town centres, the change of use of the ground floor units to residential use will not be permitted.~~

DM6 Management of Blaina Local Town Centre

77) On the basis of our advice above, there is no requirement to distinguish between Blaina and the neighbourhood centres in retail policy terms. We also consider that the definition of a centre boundary is of less relevance in Blaina and other smaller centres, given the greater mix of uses and more dispersed nature of the retail offer.

78) We would therefore suggest that a new policy relating to retail and commercial uses in such centres be included instead of the existing policy DM6, which would cover a wider range of centres and circumstances.

DM6 Management of ~~Blaina~~ ~~Local Town Centre and~~ Neighbourhood Centres

Development proposals incorporating a change of use of ground floor premises in ~~Blaina Local Town Centre~~ **the Neighbourhood Centres (including Blaina),** will be subject to the following management:

a) Retail, professional and financial services, entertainment and leisure and community uses will be supported.
b) A3 uses will not be permitted where they harm the vitality, and viability and retail mix of the area as a result of a proliferation of this type of use.
c) ~~In the case of a~~ Change of use to residential **use**, **will be permitted where the use is appropriate and in accordance with other policies within this plan and National Planning Policy and where it will not impact on the vibrancy and viability of the centre** ~~the retention of the retail site for retail/commercial purposes has been fully explored without success by way of marketing for appropriate retail/commercial purposes at reasonable market rates for a minimum of 12 months~~.

MU1 Ebbw Vale Northern Corridor

79) As a strategic mixed-use allocation, a review of the Ebbw Vale Northern Corridor Framework is outside the scope of this study. However, the inclusion of a commercial leisure hub, and other leisure-related uses would remain appropriate provided such uses could not be accommodated within Ebbw Vale town centre. Development in the Northern Corridor should complement, rather than compete with the existing retail and commercial centres.

80) The quantitative need for specific provision has not been identified in this study, but we would suggest that any commercially viable site in this location is likely to draw on a wider catchment area than the existing town centres, and, depending on the nature of the offer, could draw from outside of the County Borough.

81) We would also suggest that any proposals for food and drink provision should be intrinsically linked to the rest of the leisure offer and not provided as separate / standalone units which otherwise may be capable of development within Ebbw Vale or Tredegar town centres.

MU3 NMC Factory and Bus Depot

82) This site continues to be an important link between Lakeside Retail Park and Brynmawr Town Centre and the implementation of the approved retail development is to be welcomed.

83) Until this permission has been implemented and the development is complete, it would be advisable to retain the site allocation in the LDP. However, for the reasons provided above, we would suggest it should remain as an edge-of-centre, rather than an in-centre site, to ensure its use remains as complementary to the town centre.

AA1 Action Areas

84) There is no longer any quantitative need for additional convenience or comparison provision in Ebbw Vale or the County Borough during the period to 2033, but the Southern Gateway and Market Square sites remain potential development opportunities that could benefit the town centre.

85) The Southern Gateway site is within the defined town centre and as such would remain a sequentially preferable site for retail or other town centre uses. We therefore do not consider that any specific retail policies are required for the site.

86) The Market Square site is partially within the defined town centre and partly outside (edge-of-centre), although we have suggested that the town centre boundary should be adjusted in this area to remove it from that designation.

87) The redevelopment of the area as an important link between the existing centre and the Northern Corridor development would not be affected by these changes, and it would remain sequentially preferable to any out-of-centre sites for retail and other town centre uses. However, with no quantitative need for additional retail provision, it is considered that the current allocation should be removed.

R1 Retail Allocations

88) Of the 6 sites allocated for retail development in the current LDP, none have come forward for development to date. There is therefore no requirement to retain the allocations in the replacement plan. Specifically:

- R1.1 Rhyd y Blew Retail Park, Ebbw Vale – this site has planning permission for 6,000 sqm net of non-food retail floorspace and, it is our understanding that the development has been partially implemented and thus, this is an extant permission. This means it could come forward for

development at any time. However, it is not necessary to retain it as an allocation and instead it should be treated as any other out-of-centre retail site should new proposals come forward;

- R1.2 Extension to Festival Shopping Outlet Centre, Ebbw Vale – this permission has expired;
- R1.3 Tesco Extension, Ebbw Vale – this permission has expired;
- AA1.1 Southern Gateway, Ebbw Vale – discussed above. This allocation is no longer required but the site is within the town centre and thus should be considered as a potential sequential site should retail or the development of other town centre uses be promoted;
- AA1.2 Market Square, Ebbw Vale – discussed above. This allocation is no longer required but the site is partly in and partly on the edge of the town centre and thus should be considered as a potential sequential site should retail or the development of other town centre uses be promoted;
- R1.4 Market Square, Ebbw Vale – This allocation is no longer required but the site is within the town centre and thus should be considered as a potential sequential site should retail or the development of other town centre uses be promoted.

TM1 Tourism and Leisure

89) Policy TM1 allocates 7 sites for tourism related activities, some of which include the provision of leisure uses. We have therefore reviewed the allocated sites and would comment as follows:

- TM1.1 Eastern Valley Slopes – This allocation relates to outdoor recreation and leisure uses and as such is outside the scope of this study;
- TM1.2 Garden Festival – The closure of the Festival Park Outlet Centre is likely to mean that a wider review of the site's future is required. As such the relevance of continuing to promote the site as a major tourist destination is outside the scope of this study, although it seems unlikely that uses that could be promoted here would otherwise consider locating in any of the Blaenau Gwent town centres;
- TM1.3 Blue Lakes - This allocation relates to outdoor recreation and leisure uses and as such is outside the scope of this study;
- TM1.4 Bedwellty House and Park – This allocation relates to a network of historic buildings and landscapes and as such provide a different tourist offer to anything that could be provided in the town centres;
- TM1.5 Parc Bryn Bach (including a hotel) – This allocation relates to a countryside and recreational attraction and as such is outside the scope of this study;
- TM1.6 Nantyglo Roundhouse Towers – This allocation relates to a heritage asset and is outside the scope of this study; and
- TM1.7 Cwmtillery Lakes - This allocation relates to outdoor recreation and leisure uses and as such is outside the scope of this study.

1. Introduction

1.1. This report has been prepared jointly by Reeves Retail Planning Consultancy (RRPC) and Williams Gallagher (WG) on the instructions of the Blaenau Gwent County Borough Council (BGCBC). Its purpose is to provide an updated evidence base on retail and town centre uses (including leisure) to inform the Replacement Local Development Plan (RLDP) which the Council are in the process of preparing.

The Brief

1.2. The Blaenau Gwent Local Development Plan (LDP) which was adopted in November 2012 was based on a number of retail studies and town centre surveys, the majority undertaken by CACI in 2008/09. This information was summarised in the February 2012 (Updated) Retailing Background Paper, which informed the deposit plan and strategic policies.

1.3. Since then, a Retailing Background Paper (RBP) has been published by the Council in September 2017 as part of LDP Review. Annual surveys of town centre occupancy have also been undertaken. However, there have clearly been many significant changes in the economy and in the retail sector since the LDP was adopted. This study has therefore been commissioned to provide the necessary evidence base for the emerging RLDP and to inform the retail and town centre leisure strategy. This includes advising on the retail hierarchy in the County Borough, assessing the likely land requirements for town centre uses during the plan period 2018 – 2033 and reviewing the current town centre policies and proposals.

1.4. The RLDP will then be able to set out a clear strategy for the development of retail and other town centre uses during the plan period to support the Welsh Government's objective of achieving vibrant, attractive and viable retail and commercial centres.

1.5. This study therefore seeks to provide a detailed study of the main centres in the County Borough and to understand the changing retail and economic pressures they are experiencing. It then seeks to advise on an appropriate approach to the retail and leisure strategy for the Borough that will build on identified opportunities and manage change in a positive way for the local communities the centres serve.

1.6. Specifically, it is required to:

- Establish a hierarchy of retail and commercial centres;
- Consider the future roles of these centres during the period to 2033;
- Identify opportunities to support town centre objectives;
- Assess the quantitative and qualitative need for additional retail provision in the County Borough;
- Undertake an assessment of commercial leisure provision in Blaenau Gwent, including patterns of usage of leisure facilities, together with an assessment of future need; and
- Undertake an assessment of potential development sites, if a need for further development is identified.

Final Draft

Report Structure

1.7. To address these requirements and inform the advice provided, a considerable amount of new survey work has been undertaken, including a new household survey of shopping patterns and updated health checks of the main centres in the area.

1.8. The remainder of the report presents the findings from this research and addresses the planning policy matters that are raised. It is structured as follows:

- **Section 2** considers the Planning Policy Framework;
- **Section 3** examines retail and town centre trends at a national level and considers the implications for the centres in Blaenau Gwent;
- **Section 4** describes the current retail provision in the area and existing shopping patterns, based on the results of the household survey;
- **Section 5** summarises the results of the town centre health checks, with the detailed findings presented in Appendices 3 – 7;
- **Section 6** sets out the findings and conclusions from the quantitative retail need assessment for Blaenau Gwent, with the detailed assessment provided in Appendix 8. It also considers the qualitative need for changing retail provision in the centres;
- **Section 7** reviews existing leisure provision in the centres and considers future needs and appropriate policy responses;
- **Section 8** provides a summary of what this means for the town centres in the study area and provides our advice on the need to update existing planning policies. This includes consideration of:
    - An appropriate retail hierarchy for the centres with the associated justification;
    - Possible amendments to current town centre boundaries and Primary Retail Areas (PRAs); and
    - Detailed advice on possible changes to policy wording.
- **Section 9** summarises the main findings and conclusions of the study.

1.9. In all cases the detailed supporting material is appended to this report as indicated.

Final Draft

2. Planning Policy Framework

Planning Policy Wales

2.1. National planning policy is set out in Planning Policy Wales (PPW), the most recent version of which was published in February 2021 (Edition 11).

2.2. To support the Government's primary objective of ensuring that the planning system contributes towards the delivery of sustainable development and improves the social, economic, environmental and cultural well-being of Wales, PPW identifies a number of overarching objectives for retail and commercial centres. These are recognised as hubs of social and economic activity and the focal point for the diverse range of services which support the needs of local communities. They are highly accessible by different modes of transport and are therefore the most sustainable locations for new development.

2.3. The national objectives for town centres are to:

- Promote viable urban and rural retail and commercial centres, as the most sustainable locations to live, work, shop, socialise and conduct business;
- Sustain and enhance retail and commercial centres' vibrancy, viability and attractiveness; and
- Improve access to, and within retail and commercial centres, by all modes of transport, prioritising walking, cycling and public transport (para 4.3.3).

2.4. These objectives are to be delivered by local planning authorities through their development plans and national policy requires that:

- Retail and commercial centres should be identified in development plans (para 4.3.2);
- Development plans should provide a clear strategy for retail development, to include policies that will achieve vibrant, attractive and viable retail and commercial centres (para 4.3.4). These should be based on an understanding of the changing retail pressures affecting the centres and devise appropriate responses whether to growth or decline (para 4.3.6);
- A hierarchy of retail and commercial centres should be established and boundaries for the centres should be shown on the Proposals Map (para 4.3.10). Centres should be categorised by their function, size, scale, form and location and a framework for their future roles should be set out (paras 4.3.11 & 4.3.12);
- Policies should encourage a diversity of uses in a centre, recognising that this contributes to vibrancy and viability. Diversity can also reduce vacancy levels (para 4.3.36);
- Policies should identify which retail and commercial centres have primary and secondary shopping areas. These should be defined on the Proposals Map and the plan should include policies describing the types of uses that are likely to be acceptable in these areas (para 4.3.32);
- Mixed use developments should be encouraged where appropriate (para 4.3.34);
- The health of centres should be monitored and changes made to the policies or boundaries if the right balance of use and activity is not being achieved (paras 4.3.35 – 4.3.36);

Final Draft

- The development plan process should include an assessment of the need for additional retail development. This should include a consideration of quantitative and qualitative need (para 4.3.13);
- Precedence should be given to establishing quantitative need before qualitative need is considered for both convenience and comparison floorspace (para 4.3.15);
- Qualitative need may be an important consideration in certain circumstances where it supports the objectives of the local development plan or national planning policy. However, it is for the planning authority to determine and justify the weight given to any qualitative assessment (paras 4.3.15 – 4.3.17);
- If a need is identified, the most appropriate form, scale, and location for provision should be considered (para 4.3.8), in accordance with the 'town centre first' policy (para 4.3.18);
- The strategy and policies of the development plan should set out a framework for the authority's retail and commercial centres, taking into account the strategies of adjoining authorities to support a successful retailing sector (para 4.3.4);
- Development plans should include criteria based policies against which retail proposals can be assessed, even if there is no identified need (para 4.3.9);
- Development plans should also include policies to protect existing retail sites from inappropriate development, unless there is evidence that an existing retail site is no longer required (para 4.3.24);
- Policies and supplementary planning guidance should support the management of retail and commercial centres (para 4.3.39); and
- Residential uses should be encouraged where appropriate (para 4.3.7).

2.5. PPW is also explicit as to the types of other uses considered to be complementary to retail and therefore appropriate in retail and commercial centres. These include:

- Financial and professional services (A2);
- Food and drink (A3);
- Offices (B1);
- Hotels (C1);
- Educational and other non-residential establishments (D1);
- Leisure (D2); and
- Other uses such as launderettes and theatres (para 4.3.21).

2.6. The contribution of a vibrant and viable evening and night-time economy is also recognised, although the compatibility of the offer with nearby residential uses should be considered (para 4.3.43). Similarly, creative and cultural business clusters can be important catalysts for regeneration (para 4.3.46).

Final Draft

Technical Advice Note 4: Retail and Commercial Development

2.7. PPW is supported by a series of Technical Advice Notes (TANs) including Technical Advice Note 4: Retail and Commercial Development (TAN4) which provides further guidance on retail and town centre policy, both in relation to policy making and development management.

2.8. It sets out a requirement for local planning authorities to plan positively to protect and enhance the vibrancy, viability and attractiveness of their retail and commercial centres and to develop their retail evidence base. It also provides additional guidance on:

- How to define retail and commercial centre hierarchies, including the need to consider the future status of a centre;
- The types of policies that may be appropriate in relation to changes of use and the degree of flexibility a local planning authority wishes to see;
- The development of a clear strategy for retail and commercial centres during the plan period;
- The factors that should be considered in deciding how any identified retail need should be met, or how decline should be managed to ensure that communities retain access to the goods and services they require;
- The benefits of developing the night-time economy in relevant centres;
- How quantitative retail need should be assessed, noting that the outcome can be sensitive to small changes in the assumptions. No particular methodology is prescribed, but assessments should be prepared in a clear logical and transparent way using robust and realistic evidence;
- The appropriate times to consider qualitative need and when retail development may be justified on this basis;
- The 'town centre first' approach to development and how the sequential test should be applied both in relation to development plan site allocations and planning applications for retail or other town centre uses;
- The need to consider the impact any new site allocations may have on existing retail and commercial centres;
- The use of designated Primary and Secondary Shopping Areas to promote and maintain an effective distribution and balance of uses within a centre, noting that the level of flexibility applied is likely to reflect the centre's retail performance and demand for space; and
- The need to undertake regular assessments or 'health checks' of centres as a means of monitoring change over time, using a range of indicators to measure vitality, attractiveness and viability. A number of specific measures are referenced but TAN4 recognises that locally specific indicators may also be relevant.

Other National Policy Guidance

2.9. Other documents that may be of relevance include the recently published Building Better Places (July 2020), which seeks to consider the relevant place-making responses to the Covid-19 pandemic.

Final Draft

It sets out the Welsh Government's planning policy priorities in the recovery period. This includes 'revitalising our town centres' as one of 8 key issues to be addressed.

2.10. The Welsh Government recognises that the retail sector was already struggling before the pandemic and notes that the planning system must respond to this situation by ensuring that retail and commercial centres can operate as flexibly as possible.

2.11. The starting point for this is considered to be:

- A clear vision for each centre in LDPs;
- An assessment of the role and function of the established shopping areas; and
- Realistic and sensible boundaries for the centre, with the identification of sites for redevelopment. In particular, Primary Retail Areas need to be reviewed and there should not be an expectation that retail occupiers will return in the numbers witnessed prior to the pandemic.

2.12. Linked to this, town centre assessments should replace retail assessments for Development Plans and consider the wider array of use requirements, based upon the evidence and vision for the centre in line with the Town Centre First Principle.

2.13. Building Better Places also notes the importance of:

- Considering the opportunities to use outside spaces within town centres;
- Making centres places where a variety of retail, employment, commercial, community, leisure, health and public sector uses come together in a hub of activity to make them viable as go-to destinations once more;
- Considering the introduction of flexible, local co-working spaces;
- Introducing/expanding residential uses to improve the vitality of centres, provided that they do not curtail the commercial activities which take place and soundscapes are considered; and
- Challenging unreasonable and inflexible policies as creative thinking will be needed to reimagine and re-purpose these areas.

The Local Development Plan

2.14. The Local Development Plan (LDP) for Blaenau Gwent was adopted in November 2012 and the key retail policies are as follows:

- **Policy SP1 Northern Strategy Area – Sustainable Growth and Regeneration** which promotes Ebbw Vale as the principal hub for the County Borough where the majority of social and economic growth will be accommodated, including major retail expansion. The roles for Tredegar and Brynmawr District Town Centres and Blaina Local Town Centre are also set out, with Tredegar to expand its tourism offer through maximising the benefits of local heritage; Brynmawr is to look for opportunities to develop complementary roles around tourism and Blaina is to build on and exploit its local heritage;

Final Draft

- **SP2 Southern Strategy Area Regeneration** which seeks to promote the connectivity of Abertillery to its hub area, Ebbw Vale and the wider region through public transport links and to support the District Town Centre in developing complementary roles around culture, leisure and tourism. It also seeks to remove dereliction by promoting the reuse of underused and derelict land and buildings, building on the unique identity of the area;
- **SP3 The Retail Hierarchy and Vitality and Viability of the Town Centre** which sets out the retail hierarchy of:
    - Principal Town Centre – Ebbw Vale (sub-regional role);
    - District Town Centres – Abertillery, Brynmawr and Tredegar, with Brynmawr linked to the retail provision at Lakeside Retail Park;
    - Local Town Centre – Blaina; and
    - Neighbourhood Centres.

  Policy SP3 also sets out the new retail floorspace requirements during the plan period to 2021, namely 10,200 sqm of comparison floorspace and 2,445 sqm of convenience floorspace. The policy also seeks to improve the vitality and viability of the town centres through the refurbishment / redevelopment of existing properties and other opportunities, the provision of better accessibility and circulation arrangements and improved disabled access;
- **DM5 Principal and District Town Centre Management** which (a) defines Primary Retail Areas where only A1 uses will be permitted; (b) encourages A2, D1 and D2 uses outside of the Primary Retail Area; (c) indicates A3 uses will not be permitted where they harm the vitality and viability and retail mix of the areas as a result of proliferation and (d) does not permit the change of use of ground floor units to residential use;
- **DM6 Management of Blaina Local Town Centre** which indicates that changes of use of ground floor units will (a) be supported where retail, professional and financial services and entertainment, leisure and community uses are proposed; (b) not be supported where A3 uses will harm the vitality, viability and retail mix of the area as a result of proliferation of this type of use; and (c) need to be supported by evidence of marketing for a minimum of 12 months where changes of use from retail /commercial to residential are proposed;
- **MU1 Ebbw Vale Northern Corridor** which allocates land north of Ebbw Vale town centre for a mixed use development including a commercial leisure hub. The supporting text references the Ebbw Vale Sustainable Development Framework Supplementary Planning Guidance document which indicates that 4 ha of land would be used for commercial leisure and associated A3 uses;
- **MU3 NMC Factory and Bus Depot** which allocates the site between Brynmawr Town Centre and Lakeside Retail Park for mixed use development including commercial / leisure / community facility uses;
- **AA1 Action Area** which identifies Action Areas at the Southern Gateway and Market Square sites in Ebbw Vale;

Final Draft

- **R1 Retail Allocations** which allocates a total of 6 sites for retail development:
    - R1.1 Rhyd y Blew Retail Park, Ebbw Vale – 6,000 sqm net non-food retail (Commitment - planning permission at April 2009);
    - R1.2 Extension to Festival Shopping Outlet Centre, Ebbw Vale – 1,400 sqm net comparison (Commitment – planning permission at April 2009);
    - R1.3 Tesco Extension, Ebbw Vale – 1,700 sqm net convenience and comparison (Commitment – planning permission at April 2009);
    - AA1.1 Southern Gateway, Ebbw Vale – 500 sqm convenience (proposal);
    - AA1.2 Market Square, Ebbw Vale – 1,300 sqm comparison (proposal);
    - R1.4 Market Square, Ebbw Vale – 600 sqm net comparison (proposal).

  The supporting text also notes that the remaining 585 sqm of additional convenience floorspace and 1,060 sqm of comparison floorspace required during the plan period will be met through redevelopment schemes in the town centres; and

- **TM1 Tourism and Leisure** which allocates 7 sites for tourism related activities, including the Ebbw Vale Garden Festival site.

The Replacement Local Development Plan

2.15. The Replacement Local Development Plan (RLDP) is at a relatively early stage of preparation as would be expected given that this study will form part of the evidence base to inform the detailed policy proposals. However, a Preferred Strategy was published for consultation in January 2020.

2.16. This notes that finding a new role for town centres is one of the key challenges facing the Council, given that the change in people's shopping habits means town centres need to diversify and broaden their offer to create footfall. Town centres need to have clear roles so they do not compete against each other but policy must also be flexible.

2.17. **Draft Strategic Policy 10: Retail Centres and Development** indicates that the current retail hierarchy will be reviewed based on evidence from a Retail Study (this document) and suggests new roles will be explored for the town centres:

- Abertillery – complementary roles around culture, leisure and tourism;
- Brynmawr – opportunities to develop complementary roles around tourism and leisure;
- Ebbw Vale – will expand its role as the main administrative and service centre for the Borough; and
- Tredegar will expand its tourism offer through maximising the benefits of local heritage.

2.18. The policy also sets out steps to maintain or enhance the vibrancy, vitality and attractiveness of the town centres and indicates that the town centre and primary retail area boundaries will be reviewed and drawn in recognition of the need for a degree of flexibility in maintaining occupancy and footfall and to enable a tailored approach to be taken for each centre having regard to health checks and masterplans.

Final Draft

Planning Policy Conclusions

2.19. National planning policy recognises the importance of town centres in economic, social and sustainability terms and seeks to sustain and enhance their vibrancy, viability and attractiveness as retail and commercial centres.

2.20. PPW sets out a number of objectives for town centres that are to be delivered by local planning authorities through their development plans and these requirements are reflected in the retail and town centre policies of the current Blaenau Gwent Local Development Plan.

2.21. Both the retail sector and the economy have however changed significantly since the LDP policies were formulated. They have also been impacted more recently by the Covid-19 pandemic. One of the key challenges facing the Council is therefore to seek to provide the necessary policy support for town centres to ensure their long-term vitality and viability, whilst recognising that people's shopping habits have changed and town centres need to diversify and broaden their offer, if they are to remain relevant and successful.

2.22. Town centres need to have clear roles so they do not compete against each other but policies must also be flexible to allow opportunities for new development and investment to be realised throughout the plan period.

2.23. This requires an understanding of the current function and health of centres both individually and relative to each other. It also requires a good understanding of national trends and the extent to which they may affect the centres concerned.

Final Draft

3. Retail and Town Centre Trends

3.1. Town centres have always been dynamic multi-functional places that have developed in response to the evolving needs of their catchment area, and whilst many often associate town centres with just 'shopping' this is rarely, if ever, the case in practice.

3.2. This is important when considering the role of town centres and their health and vitality, both now and in the future, as the most successful centres are those that offer a wide range of goods and services to both the resident population and visitors to the area.

3.3. This means town centres perform a variety of roles and are about activity not just buildings and spaces, and temporary uses (whether regular such as weekly markets or one-off events) are important.

3.4. This is not to say the retail offer in a town centre is not important, as it remains a major occupier of space and generator of regular footfall, rather, as retailing changes, the importance of other town centre uses is growing in both real and relative terms.

3.5. These trends are considered in more detail below, with particular regard given to those of most relevance to the town, district and local centres of Blaenau Gwent and the changes seen since 2012 when the current LDP was adopted. However, trends and issues will continue to evolve and should be monitored throughout the plan period, to ensure that the policy response remains appropriate.[1]

Position in 2012

3.6. When the Updated Retailing Background Paper was prepared in February 2012, town centres were still experiencing the aftereffects of the economic recession which had led to higher levels of retail vacancy and longer void periods. At the same time, the effects of the growth in out of centre retailing were being felt, often at the expense of smaller centres, and 'internet shopping' was noted as a new trend.

3.7. During the same period a number of food superstores had opened in the County Borough usually in edge or out of centre locations and there were a number of extant planning permissions for further retail development, including the expansion of the Festival Shopping Outlet Centre (FSOC).

3.8. These trends, combined with the results of the various surveys undertaken during the preparation of the LDP, led the Council to develop the range of policies that were subsequently adopted. Additional retail floorspace was required over and above existing commitments (based on an assumption that comparison expenditure retention could be improved), and the LDP sought to focus this in Ebbw Vale as the highest order centre in the County Borough. A growth in tourism was expected to support the vitality and viability of Tredegar, Abertillery and Brynmawr town centres and it was considered important to protect the retail core of the main town centres and oppose developments which may harm or undermine this function.

[1] Useful sources include: (i) https://www.highstreetstaskforce.org.uk/;
(ii) https://www.revocommunity.org/content_hub; (iii) https://www.placemanagement.org/about/ ;
(iv) https://www.centreforcities.org/ ; (v) https://www.atcm.org/ ;
(vi) https://www.localdatacompany.com/insights/reports

Final Draft

Position in 2017

3.9. In September 2017, a new Retailing Background Paper was prepared as part of the initial work to inform the preparation of the RLDP. As well as noting various changes in policy and legislation, the paper also reviewed the changes seen in the retail sector and noted:

- A fundamental shift in the nature of retailing had been seen as a result of the changes in the location and means of shopping. This had led to an increased demand for larger format, purpose built stores usually in out of centre locations;
- A significant growth in internet shopping had been seen, with it accounting for 15.6% of all retail spending in April 2017 and expected to rise to 24.5% by 2020;
- The effects of these structural changes was being exacerbated by the economic downturn, with retailers looking to cut costs and downsize their store portfolios;
- The impact of these changes on small and medium sized centres was particularly noticeable; and
- The improved economic situation in the mid 2010s had led to some improvement in the health of the UK's town centres, but vacancies in Wales had increased marginally and overall consumer spending was expected to grow at a slower rate than previously, at least partially due to uncertainties over Brexit.

3.10. Other changes directly affecting the Blaenau Gwent centres included the expansion of the retail offer in neighbouring Merthyr Tydfil, including an 11,004 sqm extension to Cyfarthfa Retail Park and the start of the construction of Trago Mills on the adjoining site.

3.11. As recognised in the report, these changes made it unlikely that the increase in comparison retail expenditure that was planned for in the LDP would be realised. The subsequent analysis of vacancies and the percentage change in A1 uses in the primary retail areas indicated that the Blaenau Gwent centres had not performed particularly well between 2009 and 2017 and footfall in the centres had also seen a gradual decline.

Position in 2020

3.12. The period since 2012 has confirmed that a number of the trends witnessed at that time, were not just the result of the economic recession but represented permanent changes in the way people shop. The on-going threats to individual retailers and to the UK's town and city centres continue to be the subject of much study and debate and the challenges facing high streets and town centres are widely recognised, as is their importance in our society.

3.13. This includes recognition by the UK and Welsh governments, with the latter launching the 'Transforming Towns' initiative in January 2020. This included measures to increase footfall in town centres by making sure the public sector locate services centrally, as well as tackling empty buildings and land to help bring them back into use.

3.14. To support this new approach, the Welsh Government also announced a £90 million investment to transform Wales' town centres.

3.15. In England similar initiatives have been announced including the 'Future High Streets Fund' and 'High Streets Task Force' initiatives. The 'Call for Proposals' for the former notes that changes have always

Final Draft

affected high streets and that in the past they have proved resilient, constantly adapting to meet changing demands (Page 7). However, the speed of change has increased dramatically over recent decades and many centres are now struggling to transform in response to the structural changes they are experiencing. These include the unprecedented growth of online shopping, which increased from 1% of total retail sales in 2000 to almost a fifth of all retail sales in October 2018.

3.16. Many of these findings are mirrored in the Eleventh Report of Session by the Housing, Communities and Local Government Committee (HCLGC) in their February 2019 report on 'High streets and town centres in 2030'.

3.17. This report starts by noting that the six months during which their inquiry took place appeared to be the most turbulent for the high street so far (Page 7), with high profile closure announcements including those by Marks & Spencer and Debenhams.

3.18. The report also notes the loss of 70,000 retail jobs during 2018 (Page 7) and recognises that the retail property market has changed (Page 6). The growth of online shopping has resulted in store closures, persistently empty shops and declining footfall in town centres (Page 9) but the effect of out-of-town retail is also recognised (Page 9), with developments of the 1980s and 1990s now being established centres / retail hubs, in their own right.

3.19. The wider effects of the decline in physical shopping are also noted, with 34 medium and large retailers having gone into administration in the period 2008 – 2018, 8 of these in 2018 (24%). This affected 12,997 stores and 178,576 employees (Page 10).

3.20. As a result, the HCLGC concludes that a tipping point has been reached (Page 11) and this has brought to the fore several systemic issues which were less evident when high street retail was enjoying success:

- there is too much retail space as a result of:
  - expanded provision in town centres;
  - individual stores being too big for current retailer needs; and
  - competition between areas (Page 11);
- fragmented property ownership which makes a co-ordinated response difficult (Page 12); and
- retailers face high fixed costs including business rates and rent (Page 13), which equally affect the hospitality sector.

3.21. The report concludes that for high streets and town centres to thrive in the future, they need to adapt, including a shift away from retail focused activities (Page 6) and back towards a more varied mix of civic and community functions (Page 9).

3.22. In practice there have been a considerable range of factors affecting town centres and many of the trends seen to date were expected to continue in the future, even before the impact of Covid-19 is considered including:

- Growth in the amount and range of retail goods and service purchases being made online and a corresponding fall in footfall within centres;

Final Draft

- Food and grocery development concentrated on smaller, convenience store and 'discounter' outlets to reflect changing consumer shopping patterns. There is also less loyalty to a single retailer, with the discounters in particular benefitting from regular, if not weekly shopping trips from an increasing number of customers;
- Comparison retailers rationalising their physical store portfolios both in and out of centre;
- Those retailers seeking to expand are often in the discount / value sector and are seeking cheaper, larger units for the sale of a mix of products, often including some bulky goods;
- Continued demise of many well-known and established retail companies;
- Increased spend on eating out and socialising, although in different types of venue to the traditional 'public house', including experiential leisure venues such as Bounce (table tennis) and Flight Club (darts); and
- Increased demand in some retail service sectors, such as tattoo parlours and nail and beauty parlours, where the physical presence of the customer is required.

3.23. There has also been a recognition of the financial challenges being faced by many town centre businesses, and particularly the 'unfairness' of the current business rates system, which is considered to put an unfair burden on many town centre businesses.

3.24. However, the events of 2020 have caused a degree of divergence from some previously expected trends, including a move away from the recent emphasis on more regular, 'top-up' shopping trips and back towards the previous pattern of a single large 'weekly' shop.

3.25. There is also considerable uncertainty over the impact of Covid-19 restrictions on the food and drink and leisure sectors, although the desire to undertake such activities appears to be high.

3.26. These changes will not be fully reflected on high streets and in town centres yet, although store closures are being reported nationally on a frequent basis. Recent data from the Local Data Company (LDC) and PwC published in November 2020, considers changes within the larger centres in Great Britain including Wales up to August 2020. Relatively few of the locations will be directly comparable to the Blaenau Gwent centres but the trends identified are likely to be relevant, given that these centres operate within a wider retail context.

3.27. The keys findings of the LDC/PwC study are that:

1. There has been an acceleration in the migration of spend online, which in August 2020 accounted for 28.1% of total spend compared with 19.7% in August 2019;
2. There have been further challenges in the re-letting of units closed due to Company Voluntary Arrangements (CVAs) and administrations[2]. This is affecting all retail locations including retail parks;

[2] A CVA is a procedure that allows a company to (i) settle debts by paying only a proportion of the amount that it owes to creditors and (ii) to come to some other arrangement with its creditors over the payment of its debts. In retail situations it often means paying reduced or no rent.

3. Independent retailers have been more resilient, with the decline in independents in the convenience, comparison, service and leisure sectors being lower (net -0.54%) than for multiples (net – 2.77%);
4. There have been some green shoots for opportunistic retailers, who have been able to expand into newly vacated properties; and
5. The leisure industry is facing its toughest ever year.

3.28. These findings are unsurprising, but the more detailed analysis in the report may provide an insight into what may be expected in the Blaenau Gwent centres in the near future:

- **The biggest shift to online sales was seen in the department store sector (+11.4% Year on Year change), followed by textile, clothing and footwear stores (+10.4%).** This has contributed to recent and proposed closures by retailers including John Lewis and Debenhams. This is unlikely to directly affect the Blaenau Gwent centres, but may reduce the attraction of some competing centres and reduce expenditure outflow – although we would expect much of this to be spent online instead;
- **Vacancy rates in the first half of 2020 (H1) increased at the fastest rate since LDC records began in 2013.** Retail vacancy rates rose to 14.2% and leisure vacancy rates to 10.1% giving an overall rate of 13.0%. In Wales rates rose from 15.9% in H1 2019 to 17.7% in H1 2020;
- **Persistent vacancies continue to be a problem.** Overall, 4.6% of units have been vacant for less than a year, 3.1% for between 1 and 2 years, 1.6% for 2 to 3 years and 4.0% for more than 3 years. In shopping centres these figures increase to 8.0%, 3.8%, 2.0% and 5.0% respectively;
- **Closures exceeded openings by 7,834 in H1 2020, the highest rate for a H1 period since 2014**. This was primarily the result of closures in the national multiple sector where there was a net loss of 6,001 units. Openings remained relatively constant;

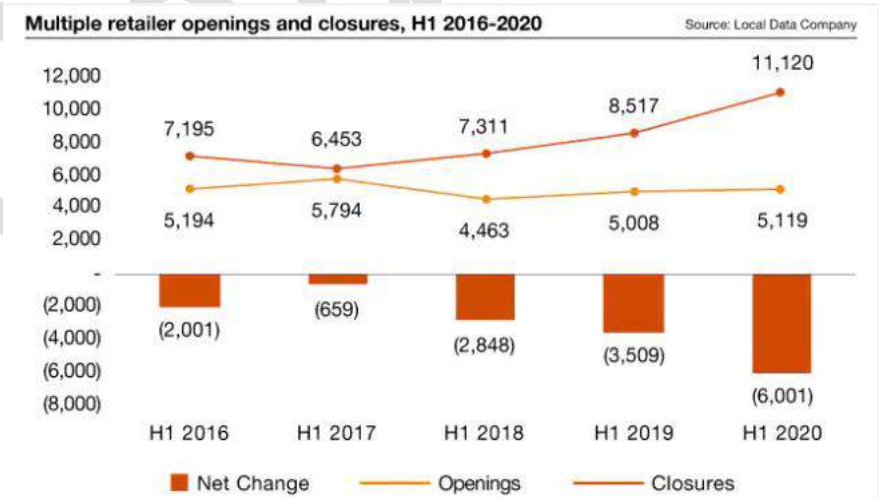


Figure 1: Store Closures and Openings First Half 2020
Source: PwC website - https://www.pwc.co.uk/industries/retail-consumer/insights/store-openings-and-closures.html

- **The comparison sector saw the greatest decline (-4,975 units).** This continues the trend seen since 2014 but represents a more than doubling of the net closures from 2019. The

leisure and service sectors also declined at a faster rate when compared with H1 2019, whilst the decline in the convenience sector was marginally lower than in H1 2019;

- **Sectors seeing growth** included barbers (+430 units), beauty salons (+308) and nail salons (+129). A number of other sectors saw big Year-on-Year increases, directly benefitting from the pandemic (e.g. plumbers merchants; domestic appliances; fast food takeaways and grocers). Going forward, LDC anticipate increased demand from the health and fitness sector, despite the challenges faced by gyms and leisure centres in recent months;
- **The biggest decline in units** has been in the betting sector, with a net loss of 780 units (867 closures) due to legislative changes in 2019. Other sectors in decline include mobile phones (-586 units) primarily as a result of the closure of standalone Carphone Warehouse units and their replacement with outlets within PC World / Currys stores, fashion shops (-371) and womens' clothing outlets (-232), estate agents (-326) and electrical goods (-322). There was also a loss of 207 chemists as independents have struggled with rising prices of wholesale medicines;
- **The independent sector has been more resilient than the national multiples.** The independent service retail sector was the only sector to see net growth, albeit marginal, and this was solely due to the growth in hairdressers and health and beauty. The decline in the independent leisure and convenience sectors was small (-0.1% and -0.2% respectively). In contrast, multiples saw a decline of -1.7% in the convenience sector, -2.4% in leisure and -1.9% in services. The biggest decline was in the comparison sector (-2.0% for independents and -4.2% for multiples). LDC however caution there may be a time lag in the impact of Covid on the independent sector;
- **Retail parks are experiencing similar problems to town centres,** with retail and leisure units vacated because of CVAs and company administrations proving difficult to relet. The net change of -2.0% H1 2018 – H1 2020 was only exceeded in shopping centres (-3.2%) which also tend to rely on the national multiples. The equivalent decline for High Streets was -1.4% and standalone -1.1%. As a result, vacancy rates at retail parks are now 8.8% compared with 15.6% in shopping centres and 12.5% in high streets. Persistent vacancy has also doubled since H1 2019 across the 2 to 3 year threshold and 1.8% of units have now been vacant for more than 3 years; and
- **In Wales the rates of change have been** similar for High Streets (-1.6%) but higher for retail parks (-3.2%) and shopping centres (-6.1%). However, the latter includes Festival Park which saw a net loss of 23 units between April and August 2020 (-74.2%). Declines were also noted at the Rhiw Shopping Centre, Bridgend (-20.0%), Deinol Shopping Centre, Bangor (-17.4%) and Friars Walk, Newport (-14.3%).

3.29. The PwC analysis for Wales also highlights that:

- Wales outperformed the GB average for the first time since H1 2018;
- The year-on-year drop is the lowest across all regions and nations in GB, i.e. Wales has fared better than the rest of GB. However, the delay in relaxing measures may have hidden the true extent of the impact of COVID-19;

Final Draft

- Wales saw a similar pattern to the wider picture, with tradesmen and car dealers leading the openings; and
- Betting shops, mobile phone shops and electrical shops were the categories that saw the biggest loss in units.

Food and Beverage Uses

3.30. Up until recently the decline in the retail offer in town centres has been at least partially offset by increased demand for space from the food and beverage (F&B) sector but pressure on this sector has also become apparent since 2016 and, even before Covid-19, it was clear that this sector alone cannot 'save' our town centres.

3.31. This is illustrated by a PwC report on Store Openings and Closures which looked at the changes seen in the sector during 2018. This showed that in addition to the 107 pub and bar closures within the top 500 centres in Britain, a total of 317 chain restaurants disappeared during the year, with Italian and pizza chains faring the worst. This was the result of several high-profile closures, such as by Prezzo, Carluccio's and Jamie's Italian.

3.32. Other closures have included Chimichanga and Byron, with the result that 2018 was the first year since PwC monitoring began in 2008 that the number of restaurant chains declined.

3.33. Looking ahead, the report noted consumers were becoming more cautious with their expenditure; there were ongoing cost challenges in the sector and there was over-capacity in a number of traditional high-footfall locations. Combined with the new opportunities for home delivery, the report concluded that this sector was likely to continue to face market disruption.

3.34. This was reflected in the updated PwC Insight Report 2019 which highlighted a net decline of 103 restaurants during the first 6 months of 2019 (153 closures and 50 openings) and a net decline of 96 pubs / bars (167 closures and 71 openings). Two of the sectors seeing the greatest growth were 'Food to Go' and Takeaways, both of which saw 76 new openings.

3.35. A 2018 report by Revo and DAC Beachcroft on the 'Evolution of the leisure experience: looking forward', also notes that, whilst the role of leisure and in particular, F&B in the retail environment has evolved significantly in recent years, there is contradictory information on the sector's performance and its possible future (Page 3).

3.36. The report therefore sought to provide an insight into the current state of the market and future developments in the leisure sector. In relation to F&B, it noted that:

- Spending on retail, F&B and non-food leisure was continuing to grow year-on-year;
- Restaurants, cafes and takeaways have seen the sharpest increase in the numbers of units since 2010, with restaurant units in occupation having increased by 70% and cafes and takeaways by over 50%;
- 1,500 restaurants opened in the UK between October 2016 and October 2017 (a 4% increase year-on-year), with branded restaurants increasing by 55% in the period 2008 – 2018;
- Some sectors within F&B were facing a number of challenges, including increasing sourcing, operating and property costs, staff shortages, particularly of chefs, and economic uncertainty (Page 18);

- The early part of 2018 saw a number of restaurant operators falling into economic difficulties with resulting store closures and company restructuring. This appeared to be partially related to market saturation in specific locations. For instance, smaller towns where dining out is restricted mainly to weekends, cannot support a number of operators. However, it was also due to the way some companies have managed their expansion (Page 15);
- The introduction of food delivery services such as Deliveroo and Just Eat was having a significant impact on the restaurant sector (Page 34). However, whilst some businesses were benefitting from this expanded exposure to customers, a number of problems had been identified going forward that would affect future growth. These included cannibalisation of existing custom, costs, demand for kitchen space in peak times, the quality of the dining experience in restaurants as deliveries take priority and a lack of transparency with feedback (Page 35); and
- Going forward, the growth in household spending on eating out was expected to slow. Overall spending was still less than before the recession (Page 16) and the number of meals out per month has declined from 10 to 9, meaning there are fewer available visits to support businesses (Page 28). However, overall market capacity was increasing:
    - there was still demand for units in prime locations (page 19); but
    - there were different types of retail and leisure journeys and in many cases the F&B sector relies on the relationship between retail and leisure (page 24), meaning it is not necessarily a draw in its own right / in isolation.

3.37. Whether these conclusions remain valid after the events of 2020 remains to be seen. Continued growth in the 'Food to Go' and Takeaway sector is expected to continue, although the location of purchases may change as a result to changes to working practices. There is also a potential issue that takeaway businesses may develop that rely entirely on a delivery service. Such businesses can operate from 'dark kitchens' on industrial estates, reducing business costs, but increasing the competition faced by town centre businesses. More generally however, it is difficult to predict how the sector will develop once Covid-19 restrictions are lifted, given the considerable financial impacts that has already been suffered and the uncertainty over how consumers will behave in the future.

3.38. It seems likely however that the demand for space for food and drink uses will vary, with smaller centres again likely to lose out to the major centres and locations with other draws. Further, the geography of the Valleys means trade inflows are likely to be limited and businesses will continue to rely on relatively small local catchment areas. This will restrict the number of potential businesses that will be attracted to the area and the potential for growth in the Blaenau Gwent centres is likely to be limited.

Final Draft

Other Commercial Town Centre Uses

3.39. Other town centre uses include those historically associated with town centres such as employment, public / civic and cultural facilities and the traditional evening / night-time economy activities such as nightclubs, as well as emerging sectors such as health and fitness activities and new types of leisure activity.

3.40. Many of these uses are already present in the larger town centres and the introduction of mixed leisure and food & drink outlets, such as those providing darts, table tennis or small bowling alleys may be attracted to the larger centres in the future. Such centres could also support a range of health and fitness related services.

3.41. However, the demand for such uses is unlikely to be sufficient to support similar developments in smaller centres, such as those in Blaenau Gwent.

3.42. Similarly, the demand for traditional office space in Blaenau Gwent is likely to be limited. However, there may be potential demand in the future for 'office hubs', to help small support small, local businesses and employees working from home.

Residential Uses in Town Centres

3.43. Residential uses have also historically been an important part of the varied offer in town centres and maintaining or increasing residential provision can help support town centre businesses. However, the potential for such development has to be considered in the context of the overall town centre offer, as not all town centre locations are appropriate. The effect on town centre vitality and viability and residential amenity will therefore be important considerations in determining the appropriateness of such development within the Blaenau Gwent town centres.

Conclusions

3.44. Town centres and our traditional high streets have always been dynamic, adapting and evolving to meet the emerging needs of their customer base but the significant and fast-moving structural changes seen since the economic recession have resulted in a significant decline in the demand for retail floorspace and centres have not been able to adapt quickly enough.

3.45. The result has been increased vacancies and under-utilised retail space. The majority of town centres are now over-spaced in terms of their retail provision and many to a significant extent. There is also on-going competition from existing out of centre locations which have also experienced vacancies and so are also competing to attract the limited number of new businesses seeking retail floorspace or space for other town centre uses.

3.46. This has not been changed by the Covid-19 pandemic, but the relative attractiveness of centres and the reasons why people visit is likely to change as a result. In some cases, this will simply be that pre-existing trends will happen more quickly, such as the amount of retail expenditure spent online. However, it also appears to have increased the importance of 'local' shopping, with people having to rely on local provision, rather than travelling to larger centres, for the most frequently purchased items. The improved use of local shopping facilities for both convenience and regularly purchased comparison items and increased use of online shopping replacing trips to higher order centres or out-of-centre shops therefore looks a realistic possibility.

Final Draft

3.47. Such a change would be likely to benefit all the Blaenau Gwent centres. However, it remains the case that the centres still need to adapt if they are to survive and thrive. This means reducing the reliance on retail uses and increasing the other uses represented in the centre.

3.48. In Wales, town centre vacancies have historically been relatively high and the need to re-purpose retail floorspace which is no longer capable of meeting retailer and shopper requirements, either because it is poorly configured or is poorly located has been recognised. The most recent changes in the retail sector will continue to reduce the demand for physical space and further re-purposing is likely to be required. The challenge will be to develop appropriate strategies to achieve this within the context of the existing centres, which are often relatively large for the catchment they serve.

3.49. These general trends also perhaps indicate why 2020 has seen the almost complete closure of the FSOC in Ebbw Vale. Many of the national multiples who were previously represented there have been rationalising their store portfolios and Ebbw Vale faces considerable competition from other centres and locations within South Wales. This may offer some potential for an improved comparison offer in Ebbw Vale but it is unlikely the same retailers will be attracted back to the area.

Final Draft

4. Retail Offer and Shopping Patterns in Blaenau Gwent

Background

4.1. The County Borough of Blaenau Gwent in South East Wales forms part of the Cardiff Capital Region, being 20 miles north of Newport and 20 miles north east of Cardiff. It is also close to Cwmbran (to the south east), Merthyr Tydfil (west) and Abergavenny (east).

4.2. Blaenau Gwent covers an area of approximately 10,900 hectares and has an estimated population of 69,700 (2018). It has one of the highest population densities in Wales as most of the population is concentrated in 23% of the area along the separate valleys formed by the rivers Sirhowy and Ebbw.

4.3. As a result, the main settlements and retail centres of Ebbw Vale, Tredegar, Brynmawr and Abertillery have relatively separate and distinct catchments reflecting the linear nature of communication along the valleys.

Figure 4.1: Blaenau Gwent Settlement Context Plan
Source: Blaenau Gwent Preferred Strategy - Replacement Local Development Plan 2018 – 2033, page 4

Retail Hierarchy

4.4. The Local Development Plan sets out the retail hierarchy in Policy SP3 of:

- Principal Town Centre – Ebbw Vale (sub-regional role);

- District Town Centres – Abertillery, Brynmawr and Tredegar, with Brynmawr linked to the retail provision at the Lakeside Retail Park;
- Local Town Centre – Blaina; and
- Neighbourhood Centres

Retail Provision

4.5. The main retail provision in the County Borough is provided within the historic town centres but is supplemented by several more recent out-of-centre developments and in-centre street markets, such as those held in Abertillery and Ebbw Vale.

Ebbw Vale

4.6. Ebbw Vale is the largest town centre in Blaenau Gwent, both in terms of the total floorspace provided within the centre and the retail (Use Class A1) provision, and it is focused on the historic Bethcar Street / Market Street area which run north /south parallel to the A4046. These streets provide mainly small retail units in older shop units, although more modern mixed use development has occurred to the north, where the centre's main multi-storey car park is located as part of the Ebbw Vale Shopping Centre development.

4.7. Larger, more modern retail units are also provided centrally within the vicinity of The Walk and include several units occupied by national comparison retailers, a McDonalds and an Aldi store. All are served by surface car parking. These units and the closest units on Bethcar Street form the Primary Retail Area (PRA) where the main comparison offer is located.

4.8. The main convenience offer is also located in The Walk area, with Iceland being within the PRA and Aldi being just outside but within the defined town centre.

4.9. The centre also includes a number of banks and financial services, library and a public house in the former Picture House. These provide additional services in the northern parts of the centre.

Abertillery

4.10. The defined town centre for Abertillery comprises two distinct areas, with the PRA covering Church Street and including a range of historic and more recent retail units. The northernmost properties adjoining Division Street / Foundry Bridge include the recently refurbished former Trinity Church and the entrance to the Anvil Court office premises, which has been developed to the rear of the older shop units on the west side of Church Street.

4.11. The town centre to the south comprises a small area of historic streets (Somerset Street, Market Street and High Street) including the Victorian Arcade and several older buildings of distinct character. The area also includes an Iceland foodstore in a more modern unit and The Met, a community arts, culture and business centre. Immediately adjoining the town centre boundary is the main decked car park for the town centre. Further west and separated from the town centre by changes in levels, are several community and service buildings, including the library. Beyond Castle Street and at a lower level again, is a modern Tesco store and petrol filling station with its own surface car parking.

Final Draft

4.12. The centre's retail provision is dominated by independent retailers, with only limited national multiple representation. The centre also has a limited financial services offer and the Post Office has moved from its own unit within Anvil Court to the Premier Store on Foundry Street.

Brynmawr

4.13. Brynmawr town centre comprises two distinct areas, the relatively flat and open area around Market Square and the historic linear shopping street of Beaufort Street. The PRA is identified as the southern half of the latter. This area is dominated by independent retailers and services, the only significant national multiples represented being Lloyds Bank and the Post Office, both in the northern part of the centre.

4.14. The town centre offer is complemented by Lakeside Retail Park located some 300m (as the crow flies) to the south west of the town centre, which provides large modern retail units for Asda and several comparison national multiples, including Halfords and Peacocks, although the trading future of the latter is uncertain. These are a major draw to the town, but the linkage to the town centre is not particularly inviting and the proposed redevelopment of the NMC Factory and Bus Depot site has still to be completed.

4.15. There has also been a recent retail development on the north eastern edge of the centre at King Street, which provides two retail units with their own car parking and a pedestrian link to one of the public car parks. The main unit has been occupied by a One Stop convenience shop and the second is being fitted out as an Italian restaurant.

Tredegar

4.16. Tredegar town centre is relatively large and has two distinct parts. The northern part is a linear centre running along Commercial Street and is formed of predominantly older shop units occupied by independent businesses. The northern part also includes the modern Gwent Shopping Centre, a precinct development that spans Stockton Way and links to the main surface car park for the centre. This provides larger modern retail units and forms the majority of the PRA along with the shops on the west side of Commercial Street.

4.17. The southern part of the centre includes the stretch of Castle Street running south from its junction with Commercial Street to The Circle. This historic area includes the Clock Tower and a number of larger historic buildings, as well as the modern library complex. The whole area is included within the Tredegar Conservation Area and again, the main occupiers are independent businesses. However, the area also includes the main bank (Barclays) and a number of public houses.

Blaina

4.18. Blaina is a local centre focused around the High Street and running from the Co-op foodstore in the north to the St Peter's Church area in the south. No PRA is designated. Its retail, service and leisure offer is inter-dispersed with residential development. The centre includes several historic buildings and more modern development. With the exception of the Co-op and the Post Office, all the businesses are independents.

Final Draft

Festival Shopping Outlet Centre (FSOC)

4.19. The FSOC to the south of Ebbw Vale, opened in 1997 and provided around 8,500 sqm of retail floorspace in over 40 units. It was previously occupied by a range of high end comparison retailers but 2020 has seen the closure of all but one store (Sports Direct).

4.20. The future of the centre is currently uncertain.

Other Out-of-Centre Provision

4.21. The main out-of-centre retail provision within the County Borough is provided by Lakeside Retail Park at Brynmawr (discussed above). The other key outlets comprise:

- Tesco at North West Approach, Ebbw Vale;
- Tesco at Castle Street, Abertillery;
- Morrison's at Beaufort Road, Ebbw Vale; and
- B&M Home store at Rhyd y Blew Retail Park, Ebbw Vale.

Household Survey - Shopping Patterns and Customer Views

4.22. Information on shopping patterns in the area has been obtained from a household survey undertaken in June / July 2020. The survey was undertaken by NEMS Market Research and sought to understand current shopping behaviour in Blaenau Gwent for food and non-food purchases. It also sought to understand how the existing town centres are used and how the Covid-19 pandemic and associated restrictions may have affected shopping behaviour.

4.23. A total of 637 interviews were undertaken across a series of 6 zones that reflect the settlement distribution within Blaenau Gwent. A map of the study area and a copy of the questionnaire are provided in Appendix 1, with the full (weighted) survey results provided in Appendix 2.

4.24. The use of individual stores and locations for different types of shopping is considered as part of the Quantitative Capacity Assessment provided in Section 6 and Appendix 8. However, the survey also provides useful information on more general shopping patterns in the area, and shoppers views on the various centres. This is set out below.

Food and Grocery (Convenience) Shopping

4.25. The main analysis on the current market shares of centres and stores and the resulting spend / turnover, follows as part of the retail capacity exercise, but the household survey also provides some useful information on other aspects of shopping behaviour.

4.26. For food shopping, the majority of Blaenau Gwent residents appear to be using a very limited number of outlets for a high proportion of their shopping, with 78% of respondents using just five stores for the majority of their food and grocery shopping:

Final Draft

Store used for most food and grocery shopping	Total (%)	Highest Use Zone(s) (% respondents)	Lowest Use Zone(s) (% respondents)
Tesco, Ebbw Vale	20.1%	Zone 1 (46.0%)	Zone 4 (3.2%)
Asda, Brynmawr	19.2%	Zone 4 (59.2%) Zone 3 (54.7%)	Zone 6 (5.5%)
Aldi, Ebbw Vale	15.5%	Zone 2 (26.5%) Zone 1 (23.6%)	Zone 6 (8.0%)
Morrisons, Ebbw Vale	15.4%	Zone 6 (30.0%)	Zone 4 (1.6%)
Tesco, Abertillery	8.1%	Zone 5 (34.9%)	Zones 1, 2, 3 & 6 (All 0.0%)

Table 4.1: Main Shops used for Food & Grocery Shopping
Source: 2020 Household Survey Q01

4.27. Just 2.5% of respondents indicated they undertook most of their food and grocery shopping online.

4.28. The responses to Q01 also shows the importance of Ebbw Vale, with over half of all respondents visiting the stores in the town for their main grocery shopping, although only the Aldi is within the town centre.

4.29. The amount spent in this limited number of outlets is also high at 70 – 80% of respondents' total food and grocery spend.

4.30.

% Monthly Spend at First Choice Food & Grocery Shop (Cumulative)	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
None	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Up to 10%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%
Up to 20%	1.5%	0.9%	0.0%	0.0%	4.8%	0.0%	4.6%
Up to 30%	2.7%	3.3%	1.1%	1.2%	6.2%	0.4%	5.5%
Up to 40%	5.0%	4.9%	6.0%	3.5%	9.4%	3.3%	5.5%
Up to 50%	19.6%	24.3%	16.2%	12.3%	18.8%	18.8%	24.1%
Up to 60%	29.2%	27.3%	30.9%	23.8%	21.9%	27.4%	37.2%
Up to 70%	39.5%	36.1%	44.1%	32.7%	25.8%	39.6%	47.8%
Up to 80%	63.6%	54.4%	69.6%	58.6%	59.5%	66.4%	68.6%
Up to 90%	79.1%	71.7%	83.6%	79.6%	80.3%	76.2%	84.4%
Up to 99%	84.7%	78.9%	89.0%	86.6%	87.0%	82.4%	86.8%
Up to 100%	97.9%	95.5%	100.0%	99.4%	100.0%	100.0%	94.9%
(Don't know / varies)	2.1%	4.5%	0.0%	0.6%	0.0%	0.0%	5.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Mean	74.6%	75.8%	74.1%	77.9%	76.4%	75.9%	69.8%

Table 4.2: Proportion of Grocery Spend at First Choice shop (with range for median value highlighted)
Source: 2020 Household Survey Q02

4.31. Around 13% of respondents only use a single outlet for their shopping (Q02) but those using more than one store, usually visit 1 or 2 other shops (average 1.5) on a regular basis.

4.32. The use of other shops for convenience shopping (Q04) is dominated by Aldi and Morrisons in Ebbw Vale (20.5% and 20.0% of respondents), with the other large stores also being well used. The growing importance of mixed goods retailers is also clear, with both B&M and Home Bargains appearing in the list of Top 10 destinations.

Zone	Top 10 Other Locations used for Food and Grocery Shopping	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Aldi, The Walk, Ebbw Vale	20.5%	29.7%	24.3%	26.2%	9.7%	12.8%	17.5%
2	Morrisons, Beaufort Road, Ebbw Vale	20.0%	22.5%	35.0%	19.2%	6.3%	10.0%	21.1%
1	Tesco, North West Approach, Ebbw Vale	17.5%	25.5%	29.2%	10.3%	11.3%	4.1%	21.7%
4	Asda, Lakeside Retail Park, Nanytyglo, Brynmawr	15.0%	4.0%	15.3%	25.7%	13.4%	30.3%	3.0%
5	Tesco, Castle Street, Abertillery	7.2%	0.0%	0.0%	6.0%	8.8%	27.1%	0.0%
6	Lidl, Gelli Road, Tredegar	6.7%	1.2%	1.1%	0.0%	0.9%	0.0%	26.7%
1	Iceland, Unit 1, The Walk, Ebbw Vale	6.4%	21.6%	3.7%	3.3%	5.0%	0.0%	5.0%
3	Farmfoods, Lakeside Retail Park, Nanytyglo, Brynmawr	4.8%	1.8%	4.4%	19.1%	4.4%	3.1%	0.0%
5	Iceland, 31 High Street, Abertillery	4.5%	0.0%	0.0%	0.7%	6.4%	17.0%	1.6%
2	B&M, Rassau, Ebbw Vale	4.2%	8.5%	5.9%	4.1%	1.8%	0.9%	3.7%
Outside	Asda, Dowlais Top, Merthyr Tydfil	4.2%	2.3%	5.6%	0.0%	1.7%	0.9%	11.2%
3	Home Bargains, Lakeside Shopping Centre, Nantyglo, Br	3.9%	3.6%	1.9%	7.6%	7.1%	5.7%	0.5%
6	Farmfoods, Gwent Shopping Centre, Tredegar	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	15.5%
4	Co-op, 53 High Street, Blaina	3.5%	1.9%	0.0%	2.8%	34.4%	1.5%	0.0%
1	Ebbw Vale	3.0%	7.1%	7.5%	2.0%	0.0%	0.5%	0.5%

Table 4.3: Most Popular 'Other' Food Shopping Destinations
Source: 2020 Household Survey Q04

Linked Shopping Trips (Q03)

4.33. The importance of the main food and grocery shop for generating linked trips appears to be relatively limited in Blaenau Gwent, with just 26% of respondents indicating that they normally combine their shopping with other activities. Older respondents are more likely to undertake such linked shopping trips as are respondents in Zones 4 (Blaina) and Zone 3 (Brynmawr). Respondents in Zone 1 (Ebbw Vale South) and Zone 6 (Tredegar) are the least likely to undertake a linked shopping trip.

4.34. Those undertaking other activities are most likely to be undertaking non-food (12.1%) or other food (9.8%) shopping. Around 2 – 2.5% of respondents are also getting petrol, visiting cafes, or combining their shopping trip with their work trip.

Food Shopping During and After Covid-19

4.35. Given the timing of the household survey, the questionnaire included several questions relating to respondents' shopping behaviour during the initial period of the Covid-19 pandemic and particularly the first lockdown period. It also included questions regarding whether respondents considered their recent experiences would lead to a change in their shopping behaviour in the future.

4.36. For food shopping during the lockdown period (Q05), the results show the expected increase in online shopping. There also appears to have been greater use of local shops, with Tesco in Abertillery and Lidl in Tredegar being the main beneficiaries.

Final Draft

Zone	Main Shop Used Before and During Covid-19 Lockdown	Total using before Covid-19 for main shopping (single response)	Total using before Covid-19 for other shopping (multiple responses)	Total using during Covid-19 (multiple responses)
	Internet / delivery	2.5%	2.1%	16.0%
1	Tesco, North West Approach, Ebbw Vale	20.1%	17.5%	21.7%
1	Aldi, The Walk, Ebbw Vale	15.5%	20.5%	17.4%
1	Iceland, Unit 1, The Walk, Ebbw Vale Retail Park, Ebbw	2.0%	6.4%	3.5%
1	Zone 1 - Other Shops	0.0%	6.3%	4.1%
2	Morrisons, Beaufort Road, Ebbw Vale	15.4%	20.0%	21.0%
2	Zone 2 - Other Shops	0.2%	4.4%	2.6%
3	Asda, Lakeside Retail Park, Nanytyglo, Brynmawr	19.2%	15.0%	19.1%
3	Zone 3 - Other Lakeside Retail Park, Nantyglo, Brynmaw	0.1%	8.8%	3.0%
3	Zone 3 - Other Shops	0.1%	2.5%	1.7%
4	Zone 4 - Shops	0.3%	3.9%	2.3%
5	Tesco, Castle Street, Abertillery	8.1%	7.2%	14.1%
5	Iceland, 31 High Street, Abertillery	1.5%	4.5%	3.9%
5	Zone 5 - Other Shops	0.0%	2.9%	1.5%
6	Lidl, Gelli Road, Tredegar	4.7%	6.7%	8.5%
6	Zone 6 - Other Shops	0.7%	6.1%	3.4%
Outside	Asda, Dowlais Top, Merthyr Tydfil	2.3%	4.2%	2.2%
Outside	Merthyr Tydfil - Other Shops	1.0%	3.1%	1.7%
Outside	Asda, High Street, Blackwood	2.0%	0.4%	2.0%
Outside	Blackwood - Other Shops	1.1%	1.0%	1.4%
Outside	Risca - All Shops	1.6%	1.9%	1.8%
Outside	Abergavenny - All Shops	1.0%	2.6%	2.0%
Outside	Caerphilly - All Shops	0.0%	0.2%	0.2%
Outside	Cwmbran - All Shops	0.1%	1.6%	0.2%
Outside	Ystrad Mynach - All Shops	0.1%	0.0%	0.1%
Outside	Other	0.3%	1.5%	0.7%
	(Don't know / varies)	0.0%	0.5%	1.4%
	(Nowhere else)	0.0%	0.9%	0.0%
	Total *	100.0%	152.7%	157.5%

** may not add to 100% due to rounding and multiple responses*

Table 4.4: Main Food & Grocery Shops before and During Covid pandemic
Source: 2020 Household Survey Q01, Q04 & Q05

4.37. The majority of respondents seem to think that the changes to their shopping patterns are only temporary, with 68% stating they definitely won't change from their previous habits (Q06). However, a significant minority suggest that they will definitely change their shopping habits as a result of their recent experiences (8.0%), with a further 11% suggesting they may make changes.

4.38. Respondents in Zones 3 and 4 (Brynmawr and Blaina) are the most likely to change their shopping habits (25% and 26% respectively will or may change), whilst those in Zone 6 (Tredegar) are the least likely to change.

4.39. Of those who may change their shopping patterns, the most likely changes appear to relate to a greater use of local independent shops and less frequent shopping (Q07).

Final Draft

Changes in Shopping Habits Post Covid 19	Agree / Agree Strongly (%)		Disagree / Disagree Strongly (%)
Use the internet / home delivery for most of my food and grocery shopping	25.5%		67.4%
Use the internet / home delivery more but continue to use previous shops	33.1%		60.2%
Shop on a less frequent basis	54.4%		39.3%
Use local independent shops more regularly	60.5%		31.6%

Table 4.5: Possible Changes to Food Shopping Habits post Covid pandemic
Source: 2020 Household Survey Q07

4.40. The contrast between the 'agree strongly' and 'disagree strongly' results is less obvious, but it does suggest that at least 12% of those responding (4% overall) will be using the internet / home delivery more in the future and around 25% (8% overall) will be using local shops more often:

Changes in Shopping Habits Post Covid 19	Agree Strongly (%)		Disagree Strongly (%)
Use the internet / home delivery for most of my food and grocery shopping	11.7%		49.0%
Use the internet / home delivery more but continue to use previous shops	11.8%		49.0%
Shop on a less frequent basis	27.3%		29.4%
Use local independent shops more regularly	25.4%		19.8%

Table 4.6: Possible Changes to Food Shopping Habits post Covid pandemic (Agree / Disagree Strongly)
Source: 2020 Household Survey Q07

4.41. Respondents in Zone 4 (Blaina) seem the least likely to increase their use of the internet / home delivery for grocery purchases, whilst respondents in Zones 2 (Ebbw Vale North) and Zone 5 (Abertillery) are the most likely to increase their use of local independent shops. However, it should be recognised that sample sizes within the zones are relatively small and absolute values are less reliable.

4.42. These trends were also picked up in Q08 which indicates that 15% of respondents (5% overall) expect to make fewer food and grocery shopping trips in the future and 8% (3% overall) expect to use smaller shops rather than the big supermarkets. There is also likely to be an increase in the number of respondents planning their purchases before undertaking a shop and an increase in the amount purchased on each trip.

Final Draft

Comparison Shopping and Use of the Internet

4.43. Again, the main analysis on the current market shares of centres for different types of comparison goods is provided as part of the retail capacity exercise. However, the top three destinations overall and for each zone and product type are summarised below (based on shopping behaviour before the Covid-19 pandemic):

All Zones	Most Popular destination	Second choice destination	Third choice destination
Clothing / Footwear (First Choice) (Q09)	Internet / delivered	Cyfarthfa Retail Park, Merthyr Tydfil	Cwmbran Town Centre
Clothing / Footwear (Other) (Q11)	Internet / delivered	Cyfarthfa Retail Park, Merthyr Tydfil	Cwmbran Town Centre
Personal Care / Medical / Pharmaceutical Goods & Equipment (Q13)	Ebbw Vale Town Centre	Tredegar Town Centre	Lakeside Retail Park, Brynmawr
Recreational Goods (Q15)	Internet / delivered	Ebbw Vale Town Centre	FSOC, Ebbw Vale
Audio-Visual Goods (Q17)	Internet / delivered	Cyfarthfa Retail Park, Merthyr Tydfil	Ebbw Vale Town Centre
Furniture / Carpets / Floorcoverings (Q19)	Internet / delivered	Ebbw Vale Town Centre	Cyfarthfa Retail Park, Merthyr Tydfil
Items for the house (Q21)	Internet / delivered	Cyfarthfa Retail Park, Merthyr Tydfil	Lakeside Retail Park, Brynmawr
Items for Personal Use (Q23)	Internet / delivered	Ebbw Vale Town Centre	Cardiff City Centre
Books / Stationery (Q25)	Internet / delivered	Lakeside Retail Park, Brynmawr	Ebbw Vale Town Centre
Household Appliances (Q27)	Internet / delivered	Cyfarthfa Retail Park, Merthyr Tydfil	Ebbw Vale Town Centre
DIY / Garden / Pet-Related Goods (Q29)	Cyfarthfa Retail Park, Merthyr Tydfil	Ebbw Vale Town Centre	B&M Home Store, Rhyd-y-Blew, Ebbw Vale

Table 4.7: Main Shopping destinations for Comparison Purposes
Source: 2020 Household Survey

Final Draft

	Other Popular Destinations (by Zone)
Clothing / Footwear (Q09 & Q11)	Tesco, Ebbw Vale (Zone 1) Ebbw Vale Town Centre (Zones 1 & 2) FSOC, Ebbw Vale (Zones 1, 2 & 4) Lakeside Retail Park, Brynmawr (Zones 2, 3, 4 & 5) Abergavenny Town Centre (Zone 3) Cardiff City Centre (All Zones)
Personal Care / Medical / Pharmaceutical Goods & Equipment (Q13)	Cwm (Zone 1) Tesco, Ebbw Vale (Zones 1 & 2) B&M Home Store / Morrisons, Rhyd-y-Blew, Ebbw Vale (Zones 1, 2 & 6) Blaina Town Centre (Zone 4) Cwmbran Town Centre (Zones 4 & 5) Abertillery Town Centre (Zone 5) Tesco, Abertillery (Zone 5) Tesco Extra, Risca (Zone 5)
Recreational Goods (Q15)	Cyfarthfa Retail Park, Merthyr Tydfil (Zones 2, 3 & 6) Lakeside Retail Park, Brynmawr (Zones 3 & 4) Cardiff City Centre (Zones 2, 4 & 7) Cwmbran Town Centre (Zones 4 & 5)
Audio-Visual Goods (Q17)	Lakeside Retail Park, Brynmawr (Zones 3 & 4) Cwmbran Town Centre (Zones 4 & 5) Cwmbran Retail Park (Zone 5)
Furniture / Carpets / Floorcoverings (Q19)	Brynmawr Town Centre (Zone 3) Abertillery Town Centre (Zone 5) Cwmbran Town Centre (Zone 5) Tredegar Town Centre (Zone 6) Cardiff (City Centre, Ikea and Retail Parks) (All Zones)
Items for the house (Q21)	Ebbw Vale Town Centre (Zones 1 & 2) Tesco, Ebbw Vale (Zone 1) FSOC, Ebbw Vale (Zone 2) B&M Home Store / Morrisons, Rhyd-y-Blew, Ebbw Vale (Zones 2, 5 & 6) Cwmbran (Town Centre & Retail Parks) (Zone 5) Newport Retail Parks (Zone 5) Asda, Dowlais Top, Merthyr Tydfil (Zone 6) Cardiff (City Centre, Ikea and Retail Parks) (All Zones)
Items for Personal Use (Q23)	Abergavenny Town Centre (Zone Zones 2, 3 & 6) Brynmawr Town Centre (Zone 3) Cwmbran Town Centre (Zone 5) Tredegar Town Centre (Zone 6) Merthyr Tydfil Town Centre (Zone 6) Cyfarthfa Retail Park, Merthyr Tydfil (Zone 6)
Books / Stationery (Q25)	Tesco, Ebbw Vale (Zones 1 & 6) Festival Park Outlet SC, Ebbw Vale (Zones 1 & 2) Abergavenny (Zone 2) Morrisons, Ebbw Vale (Zones 2 & 6)

Final Draft

	Other Popular Destinations (by Zone)
	Brynmawr Town Centre (Zone 3) Cwmbran Town Centre (Zone 5) Tredegar Town Centre (Zone 6) Asda, Dowlais Top, Merthyr Tydfil (Zone 6)
Household Appliances (Q27)	Lakeside Retail Park, Brynmawr (Zones 3 & 4) Cwmbran Retail Park (Zone 5)
DIY / Garden / Pet-Related Goods (Q29)	Screwfix, Ebbw Vale (Zones 2, 3 & 6) Brynmawr Town Centre (Zone 3) Abertillery Town Centre (Zone 5) B&Q, Cwmbran (Zone 5) Cwmbran Retail Park (Zone 5) Tredegar Town Centre (Zone 6)

Table 4.8: Other Popular Destinations for Comparison Shopping
Source: 2020 Household Survey

4.44. The survey also provides some useful information on the use of the internet for different types of purchases (pre Covid-19).

% Annual Spend on Internet	None	1 10%	11 40%	41 70%	Over 70%	Don't know / Varies
Clothing / Footwear (Q12)	33.9%	9.8%	16.0%	15.2%	21.6%	3.4%
Personal Care / Medical / Pharmaceutical Goods & Equipment (Q14)	84.8%	4.4%	3.6%	2.1%	4.7%	0.4%
Recreational Goods (Q16)	29.5%	4.8%	8.0%	13.7%	43.3%	0.9%
Audio-Visual Goods (Q18)	45.9%	3.3%	5.8%	12.5%	32.0%	0.5%
Furniture / Carpets / Floorcoverings (Q20)	66.9%	2.4%	5.6%	5.1%	19.0%	1.1%
Items for the house (Q22)	53.5%	5.4%	9.3%	13.3%	17.9%	0.7%
Items for Personal Use (Q24)	56.8%	2.2%	6.8%	8.9%	24.3%	1.1%
Books / Stationery (Q26)	46.4%	4.3%	4.8%	6.3%	37.7%	0.4%
Household Appliances (Q28)	51.5%	2.0%	5.9%	10.1%	29.8%	0.7%
DIY / Garden / Pet-Related Goods (Q30)	80.6%	3.6%	6.0%	4.0%	5.1%	0.7%

Table 4.9: Internet Spending on Comparison Goods (pre Covid-19)
Source: 2020 Household Survey

Final Draft

4.45. This shows the importance of online shopping for all types of comparison goods, even before the Covid-19 pandemic. Online purchases of recreational goods and books/stationery are particularly high, but all types of goods are being purchased online.

4.46. For town centres, it is of note that, whilst a third of respondents never buy clothes online (33.9%), a fifth (21.6%) buy more than 70% of their purchases online. However, it is also noticeable that half or more of respondents never use the internet to purchase items for the house, household appliances or for personal care or use. 46% of respondents never shop online for books / stationery.

4.47. However, the other two categories of goods with the lowest spend online (DIY / Garden / Pet-Related and Furniture / Carpets / Floorcoverings) are products less likely to be purchased in town centres.

Comparison Shopping During and After Covid-19

4.48. As with food-shopping, it would be expected that respondents' shopping behaviour has changed during the Covid-19 pandemic and particularly the first lockdown period and therefore a number of questions regarding recent shopping patterns and experience for non-food shopping were also included in the survey.

4.49. This confirmed that only 31% of respondents had made comparison purchases online during the initial four months of restrictions, with those living in Zone 5 (Abertillery) the most likely to have done so.

4.50. Of those who had used the internet for purchases they would previously have made in a shop, nearly half had purchased clothing and/or footwear (48% and 44% respectively). This equates to 15% and 14% of all respondents.

4.51. Other popular purchases were:

- DIY goods and equipment (35% of those shopping online; 11% overall);
- Recreational goods (34% of those shopping online; 11% overall);
- Garden plants and equipment (32% and 10%);
- Items for the house (24% and 8%);
- Books and stationery (23% and 7%);
- Personal care items (22% and 7%); and
- Audio-visual goods (20% and 6%).

4.52. This experience has made those using online more likely to use this method of shopping in the future (Q33), with 63% indicating they were 'very likely' or 'quite likely' to do so, compared with just 23% who said they were unlikely to do so. This represents around a fifth of all respondents, which, together with those already undertaking online shopping suggests the overall market share of internet sales is likely to continue to rise in the near future.

4.53. In terms of the items most likely to see increased purchases online, clothing, footwear and recreational goods are likely to benefit the most, although even in these sectors around half of respondents do not see their recent experiences changing their shopping habits:

Final Draft

Change in online / mail order shopping habits (Q34)	More likely to use in the future	Less likely to use in the future
Clothing	51%	48%
Footwear	48%	50%
Personal Care items	21%	78%
Medical / Pharmaceutical Goods & Equipment	14%	85%
Recreational Goods	49%	49%
Audio-Visual Goods	41%	58%
Furniture / Carpets / Floorcoverings	17%	80%
Items for the house	33%	64%
Items for Personal Use	25%	73%
Books / Stationery	42%	56%
Household Appliances	43%	55%
DIY / Garden / Pet-Related Goods	33%	65%

Table 4.10: Likely Changes in Online Comparison Shopping Behaviour
Source: 2020 Household Survey Q34

Use of the Blaenau Gwent and other Centres

4.54. In terms of the use of the Blaenau Gwent centres (Q35), Ebbw Vale and Brynmawr are the most frequently visited centres in the County Borough, with at least a third of respondents visiting each location at least once a week and half of visiting at least once a month.

4.55. FSOC in Ebbw Vale and Cwmbran town centre are also visited on a regular (at least monthly) basis by a significant minority of respondents. Blaina is the least frequently visited with 83% indicating they never go there.

Cumulative Frequency of Visits	Abertillery	Blaina TC	Brynmawr (TC or RP)	Ebbw Vale TC	Tredegar TC	Festival Park, Ebbw Vale	Cwmbran TC	Merthyr TC
At least 5 times a week	4.2%	2.4%	4.1%	2.8%	2.4%	0.3%	0.3%	0.4%
At least twice a week	9.8%	4.9%	16.6%	14.3%	9.9%	2.5%	1.0%	1.3%
At least once a week	17.0%	8.0%	34.1%	35.7%	18.9%	13.5%	8.8%	5.8%
At least once a fortnight	18.5%	9.8%	42.2%	45.6%	21.1%	25.7%	18.6%	11.7%
At least once a month	22.8%	11.0%	50.3%	56.1%	24.6%	43.9%	38.9%	23.9%
At least occasionally	35.3%	17.2%	72.8%	81.0%	37.4%	78.2%	67.9%	52.1%
Never	64.4%	82.8%	27.2%	18.4%	62.2%	21.3%	31.8%	47.6%
(Don't know / varies)	0.29%	0.00%	0.0%	0.6%	0.4%	0.5%	0.4%	0.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 4.11: Frequency of Visits to Main Centres in Blaenau Gwent and area
Source: 2020 Household Survey Q35

Final Draft

Abertillery Town Centre

4.56. Overall, 35% of all respondents indicated they visited Abertillery town centre, at least occasionally, with 71% of respondents in the home zone visiting at least once a month.

4.57. The main inflow of shoppers comes from Zone 4 (Blaina), with a quarter of respondents visiting at least monthly. Inflows from other parts of Blaenau Gwent are limited.

Abertillery Town Centre - Frequency of Visit (Cumulative)	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
At least 5 times a week	4.2%	0.0%	1.7%	1.2%	3.1%	12.5%	3.8%
At least twice a week	9.8%	0.0%	1.7%	4.1%	5.4%	35.1%	3.8%
At least once a week	17.0%	2.1%	3.4%	7.5%	12.3%	59.2%	5.2%
At least once a fortnight	18.5%	2.1%	3.4%	7.5%	16.3%	64.1%	5.7%
At least once a month	22.8%	8.3%	3.4%	9.3%	26.7%	71.2%	8.6%
At least occasionally	35.3%	17.5%	12.6%	22.4%	55.0%	92.5%	11.8%
Never	64.4%	81.0%	87.4%	77.6%	45.0%	7.5%	88.2%
(Don't know / varies)	0.3%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 4.12: Frequency of Visits to Abertillery by Zone
Source: 2020 Household Survey Q35

4.58. The most popular reason for visiting the centre is for shopping with nearly two-thirds of all visitors indicating they shop there at least once a week and 85% shop there at least once a month. The sports and health & fitness facilities are the next most frequently visited on a weekly basis, but the combined F&B offer is also an important draw, particularly on a less frequent (monthly) basis. Usage of the service provision is also relatively high on a monthly basis, whilst employment is an important activity for around 16% of all respondents generating multiple trips during the week.

Frequency of Visit to Abertillery Town Centre (all respondents visiting centre)	% At least once a week	At least once a month		Never
Food / Non-Food Shopping	60.6%	84.9%		10.2%
Financial /Business Services	10.6%	17.3%		78.8%
To Visit Service Providers	10.9%	37.1%		48.2%
Sports / Health & Fitness	23.3%	24.1%		74.4%
Bars / Pubs	15.8%	37.1%		52.1%
Cafes / Coffee Shops	19.4%	33.3%		56.5%
Restaurants	12.1%	26.3%		63.3%
For Work	15.8%	15.8%		81.5%

Table 4.13: Reasons for and frequency of Visit to Abertillery town centre (All visitors)
Source: 2020 Household Survey Q36

4.59. Usage of the town centre by those respondents in the 'home zone' (Zone 5) is similar to the overall survey responses. The frequency of visits is generally higher, as would be expected and the service providers and F&B sectors are particularly well used.

Frequency of Visit to Abertillery Town Centre (Zone 5 respondents visiting centre)	% At least once a week	At least once a month		Never
Food / Non-Food Shopping	71.8%	87.2%		7.0%
Financial /Business Services	15.6%	22.6%		73.9%
To Visit Service Providers	12.8%	46.2%		35.4%
Sports / Health & Fitness	26.1%	27.2%		70.5%
Bars / Pubs	20.8%	47.1%		41.0%
Cafes / Coffee Shops	23.4%	37.8%		50.4%
Restaurants	17.8%	37.8%		49.2%
For Work	13.2%	13.2%		82.8%

Table 4.14: Reasons for and frequency of Visit to Abertillery town centre (Zone 5 visitors)
Source: 2020 Household Survey Q36

4.60. Views on the town centre were mixed, with the ease of movement within the centre appreciated by the majority. The availability of car parking is also ranked positively. In contrast, the range and quality of shops, is seen as poor or very poor by 60% of respondents and the attractiveness and overall experience of visiting the centre is only considered to be good by 16%.

Abertillery Town Centre Ratings	Good or Very Good (%)		Poor or Very Poor (%)
Range and Quality of Shops	11.7%		60.2%
Range and Quality of Places to Eat & Drink	25.0%		39.3%
Availability of Car Parking	41.1%		28.7%
Ease of moving around the Centre	60.6%		13.2%
Attractiveness and Overall Experience	15.9%		54.6%

Table 4.15: Abertillery Town Centre Ratings
Source: 2020 Household Survey Q37

Final Draft

Blaina Town Centre

4.61. Overall, just 17% of all respondents indicated they visited Blaina town centre, at least on an occasional basis, but use of the centre by respondents in the home zone (Zone 4) is good, with 60% visiting at least once a week, and 74% visiting at least once a month.

4.62. The main inflow of shoppers comes from Zone 3 (Brynmawr), but only 14% of respondents indicate they visit at least once a month. There is also a small amount of inflow from Zones 1, 2 and 5 (Ebbw Vale and Abertillery).

Blaina Town Centre - Frequency of Visit (Cumulative)	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
At least 5 times a week	2.4%	0.0%	2.7%	4.7%	15.2%	0.0%	0.9%
At least twice a week	4.9%	0.0%	4.4%	7.7%	34.0%	2.4%	0.9%
At least once a week	8.0%	1.6%	5.0%	9.5%	60.1%	5.2%	0.9%
At least once a fortnight	9.8%	4.1%	5.0%	11.8%	68.9%	6.9%	0.9%
At least once a month	11.0%	4.1%	6.0%	13.6%	74.3%	8.6%	0.9%
At least occasionally	17.2%	8.2%	9.3%	23.3%	89.8%	17.9%	2.3%
Never	82.8%	91.8%	90.7%	76.7%	10.2%	82.1%	97.7%
(Don't know / varies)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 4.16: Frequency of Visits to Blaina by Zone
Source: 2020 Household Survey Q35

4.63. The most popular reason for visiting the centre is for shopping, with nearly 80% of all visitors indicating they shop there at least once a month. Around a fifth use the financial services in the centre at least monthly and 12% visit weekly for work. Other reasons for visiting the centre are limited.

Frequency of Visit to Blaina Town Centre (all respondents visiting centre)	% At least once a week	At least once a month		Never
Food / Non-Food Shopping	54.2%	79.0%		20.0%
Financial /Business Services	11.9%	19.3%		75.6%
To Visit Service Providers	0.8%	10.9%		82.7%
Sports / Health & Fitness	0.5%	0.5%		99.5%
Bars / Pubs	6.3%	9.1%		83.3%
Cafes / Coffee Shops	7.0%	9.3%		88.1%
Restaurants	4.5%	6.8%		90.5%
For Work	11.5%	15.6%		84.4%

Table 4.17: Reasons for and frequency of Visit to Blaina town centre (All respondents)
Source: 2020 Household Survey Q38

4.64. Usage of the town centre by those respondents in the 'home zone' (Zone 4) is similar to the overall survey responses, with shopping being the primary reason for visiting, followed by the financial / business service offer, but overall levels of use for other purposes is low.

Frequency of Visit to Blaina Town Centre (Zone 4 respondents visiting centre)	% At least once a week	At least once a month		Never
Food / Non-Food Shopping	64.1%	84.2%		13.7%
Financial /Business Services	25.2%	34.2%		60.5%
To Visit Service Providers	0.0%	9.5%		77.1%
Sports / Health & Fitness	1.1%	1.1%		98.9%
Bars / Pubs	10.2%	14.5%		81.6%
Cafes / Coffee Shops	1.1%	1.1%		96.9%
Restaurants	3.2%	6.4%		93.6%
For Work	5.9%	5.9%		90.9%

Table 4.18: Reasons for and frequency of Visit to Blaina town centre (Zone 4 respondents)
Source: 2020 Household Survey Q38

4.65. The low levels of usage of the centre are reflected in the high levels of dissatisfaction with the offer, with the overall experience and attractiveness of the centre considered to be poor or very poor by 71% of those using it. The range and quality of shops and places to eat and drink is considered to be poor by similar numbers. Only the ease of moving around the centre is considered to be positive by a more respondents than consider it a negative.

Blaina Town Centre Ratings	Good or Very Good (%)		Poor or Very Poor (%)
Range and Quality of Shops	5.6%		72.6%
Range and Quality of Places to Eat & Drink	5.3%		72.9%
Availability of Car Parking	33.4%		42.0%
Ease of moving around the Centre	48.9%		29.0%
Attractiveness and Overall Experience	10.2%		70.8%

Table 4.19: Blaina Town Centre Ratings
Source: 2020 Household Survey Q39

Final Draft

Brynmawr Town Centre and the Lakeside Retail Park

4.66. Brynmawr is the second most frequently visited location in Blaenau Gwent, with half of all respondents visiting either the town centre or Lakeside Retail Park on at least a monthly basis and nearly three-quarters visiting at least occasionally.

4.67. Within the home zone (Zone 3), over 80% of respondents visit at least once a week, 90% at least once a month and less than 2% never visit. There is also significant trade inflow from nearby Zone 4 (Blaina) with 63% of respondents visiting at least once a week and only 10% never visiting.

4.68. Inflows from the other zones is also significant, with 62% of Zone 5 (Abertillery) respondents visiting at least once a month along with over 50% of Zone 2 (Ebbw Vale North) respondents. The lowest inflows are seen from Zones 6 (Tredegar).

Brynmawr (Town Centre and Lakeside Retail Park) - Frequency of Visit (Cumulative)	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
At least 5 times a week	4.1%	1.6%	6.2%	16.4%	0.0%	0.8%	0.9%
At least twice a week	16.6%	4.1%	17.4%	48.5%	15.2%	15.9%	6.1%
At least once a week	34.1%	10.6%	29.7%	82.0%	62.7%	40.1%	9.5%
At least once a fortnight	42.2%	18.9%	41.1%	83.8%	67.5%	56.7%	11.9%
At least once a month	50.3%	31.5%	51.7%	90.2%	77.4%	61.9%	17.9%
At least occasionally	72.8%	65.7%	86.9%	98.3%	90.0%	77.8%	40.9%
Never	27.2%	34.3%	13.1%	1.7%	10.0%	22.2%	59.1%
(Don't know / varies)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 4.20: Frequency of Visits to Brynmawr by Zone
Source: 2020 Household Survey Q35

4.69. The most popular reason for visiting the town is for shopping at Lakeside Retail Park, with approximately twice as many visiting the retail park as the town centre on both a weekly and monthly basis. The proportion of respondents who don't visit the retail park on at least a monthly basis is very small (7%).

4.70. However, there appears to be few other reasons for visiting the centre regularly, with in excess of 70% of respondents not using any of the other services or facilities.

Frequency of Visit to Brynmawr (all respondents visiting)	% At least once a week	At least once a month		Never
Food / Non-Food Shopping in Town Centre	33.4%	53.9%		37.0%
Food / Non-Food Shopping at Lakeside Retail Park	63.4%	92.9%		2.1%
Financial /Business Services	7.1%	14.7%		79.8%
To Visit Service Providers	2.0%	14.6%		73.1%
Sports / Health & Fitness	2.5%	3.3%		94.4%

Frequency of Visit to Brynmawr (all respondents visiting)	% At least once a week	At least once a month		Never
Bars / Pubs	6.9%	18.6%		72.3%
Cafes / Coffee Shops	5.0%	12.3%		81.2%
Restaurants	3.2%	17.5%		74.4%
For Work	7.8%	10.8%		86.8%

Table 4.21: Reasons for and frequency of Visit to Brynmawr (All respondents)
Source: 2020 Household Survey Q40

4.71. Usage of the town centre by those respondents in the 'home zone' (Zone 3) is similar to the overall survey responses, with shopping being the primary reason for visiting. The financial / business services, other service providers and bars / pubs are regularly used on a less frequent (monthly) basis. However, there is very low usage of the cafes / coffee shops and restaurants, with around three-quarters of all respondents never visiting for these purposes.

4.72. The higher levels of usage of the Retail Park are also clear with over 85% of respondents visiting at least once a week and nearly 100% visiting at least monthly. In contrast, only 62% visit the town centre at least weekly and 79% monthly.

Frequency of Visit to Brynmawr (Zone 3 respondents visiting)	% At least once a week	At least once a month		Never
Food / Non-Food Shopping in Town Centre	62.3%	78.8%		17.9%
Food / Non-Food Shopping at Lakeside Retail Park	85.3%	97.2%		0.7%
Financial /Business Services	18.3%	32.2%		59.8%
To Visit Service Providers	4.8%	34.4%		41.7%
Sports / Health & Fitness	4.6%	4.6%		90.1%
Bars / Pubs	14.0%	30.1%		59.9%
Cafes / Coffee Shops	9.4%	18.6%		72.5%
Restaurants	4.6%	19.7%		74.3%
For Work	12.0%	12.0%		85.8%

Table 4.22: Reasons for and frequency of Visit to Brynmawr (Zone 3 respondents)
Source: 2020 Household Survey Q40

Final Draft

4.73. The overall offer of Brynmawr town centre and the retail park results in higher levels of satisfaction than is seen in some other centres, with nearly 40% ranking the range and quality of shops as at least 'good' compared with 21% who consider it poor. The availability of parking, ease of movement around the centre and overall attractiveness and experience of visiting are also ranked as good by more respondents than consider the offer poor. However, nearly half (45%) of all respondents consider the F&B offer to be poor or very poor.

Brynmawr Town Centre Ratings	Good or Very Good (%)		Poor or Very Poor (%)
Range and Quality of Shops	39.4%		20.9%
Range and Quality of Places to Eat & Drink	18.8%		44.8%
Availability of Car Parking	46.0%		27.6%
Ease of moving around the Centre	55.7%		11.1%
Attractiveness and Overall Experience	34.4%		25.5%

Table 4.23: Brynmawr Town Centre ratings
Source: 2020 Household Survey Q41

Ebbw Vale Town Centre

4.74. Ebbw Vale town centre is well used by respondents across the County Borough, with 36% indicating they visit at least weekly and 56% visiting at least monthly. There are however nearly a fifth of respondents (18%) who never visit. Usage in the home zones (Zones 1 and 2) is higher with 66% of Zone 1 and 62% of Zone 2 residents visiting at least weekly. Only 6% and 3% of respondents in these respective zones never visit.

4.75. The main inflow of shoppers comes from Zone 3 (Brynmawr), with half of respondents indicating they visit at least once a month, followed by Tredegar (Zone 6 – 44%). Inflows from the remaining zones (Zones 4 and 5 – Blaina and Abertillery) are also good with 38% and 34% of respondents respectively visiting at least once a month.

Ebbw Vale Town Centre) - Frequency of Visit (Cumulative)	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
At least 5 times a week	2.8%	5.9%	8.8%	0.6%	0.0%	0.0%	0.9%
At least twice a week	14.3%	36.3%	30.6%	8.8%	1.4%	2.5%	3.7%
At least once a week	35.7%	66.4%	61.7%	27.6%	13.1%	19.5%	20.3%
At least once a fortnight	45.6%	80.2%	73.1%	32.9%	18.3%	29.5%	30.7%
At least once a month	56.1%	86.8%	82.7%	49.7%	37.5%	33.7%	44.1%
At least occasionally	81.0%	93.3%	96.2%	70.0%	73.7%	67.3%	83.1%
Never	18.4%	5.8%	2.1%	30.0%	26.3%	32.7%	16.0%
(Don't know / varies)	0.6%	0.9%	1.7%	0.0%	0.0%	0.0%	0.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 4.24: Frequency of Visits to Ebbw Vale by Zone
Source: 2020 Household Survey Q35

4.76. The most popular reason for visiting the centre is for shopping, with 86% of all visitors indicating

they shop there at least once a month. Over a third of visitors use the financial services in the centre on a monthly basis and over 20% visit the bars / pubs and the cafes / coffee shop.

Frequency of Visit to Ebbw Vale Town Centre (all respondents visiting centre)	% At least once a week	At least once a month		Never
Food / Non-Food Shopping	59.7%	86.1%		6.3%
Financial /Business Services	18.9%	37.3%		51.7%
To Visit Service Providers	1.3%	16.6%		68.7%
Sports / Health & Fitness	9.5%	14.6%		82.0%
Bars / Pubs	10.1%	21.4%		68.6%
Cafes / Coffee Shops	13.1%	23.2%		70.4%
Restaurants	7.3%	17.4%		74.2%
For Work	12.0%	13.0%		84.1%

Table 4.25: Reasons for and frequency of Visit to Ebbw Vale town centre (All respondents)
Source: 2020 Household Survey Q42

4.77. Usage of the town centre by those respondents in the 'home zones' (Zones 1 and 2) is similar to the overall survey responses, with shopping being the primary reason for visiting. Over 90% of respondents in both zones visit at least once a month.

4.78. The financial / business offer is also very important with around half of all respondents in both zones visiting at least monthly. The other services are also well used as are the bars / pubs. However, around 70% of respondents never visit the cafes / coffee shops or restaurants.

Frequency of Visit to Ebbw Vale Town Centre (Zones 1 & 2 respondents visiting centre)	% At least once a week		At least once a month			Never	
	1	2	1	2		1	2
Food / Non-Food Shopping	77.3%	71.3%	90.7%	90.4%		4.0%	4.7%
Financial /Business Services	29.1%	33.0%	48.7%	52.9%		38.2%	38.7%
To Visit Service Providers	1.8%	2.7%	30.9%	24.2%		49.2%	56.6%
Sports / Health & Fitness	9.7%	16.5%	16.9%	17.7%		80.1%	77.7%
Bars / Pubs	13.8%	18.4%	16.5%	30.2%		56.3%	57.6%
Cafes / Coffee Shops	21.3%	15.2%	32.0%	23.6%		61.5%	69.0%
Restaurants	13.0%	6.4%	22.8%	16.1%		66.2%	73.7%

Final Draft

Frequency of Visit to Ebbw Vale Town Centre (Zones 1 & 2 respondents visiting centre)	% At least once a week		At least once a month			Never	
	1	2	1	2		1	2
For Work	12.8%	12.8%	13.9%	12.8%		83.2%	85.9%

Table 4.26: Reasons for and frequency of Visit to Ebbw Vale town centre (Zones 1 & 2 respondents)
Source: 2020 Household Survey Q42

4.79. Views on the centre are mixed with a fairly even split between those who think the centre has a good offer and those that consider it poor. Approximately half of respondents consider it to be neither. Despite the high use of the centre for shopping, slightly more respondents consider the offer to be poor rather than good. The ease of moving around the centre is highly rated and the availability of car parking is considered at least good by 38% compared with 27% who consider it poor. However, the range and quality of places to eat and drink is considered to be poor or very poor by 40%.

Ebbw Vale Town Centre Ratings	Good or Very Good (%)		Poor or Very Poor (%)
Range and Quality of Shops	24.4%		35.3%
Range and Quality of Places to Eat & Drink	19.8%		39.8%
Availability of Car Parking	38.2%		26.6%
Ease of moving around the Centre	67.9%		9.0%
Attractiveness and Overall Experience	26.0%		28.7%

Table 4.27: Ebbw Vale Town Centre Ratings
Source: 2020 Household Survey Q43

Tredegar Town Centre

4.80. Overall, a quarter of all respondents indicated they visited Tredegar town centre, at least once a month, but use of the centre by respondents in the home zone (Zone 6) is good with 76% visiting at least once a week, and 89% visiting at least once a month.

4.81. Inflows of shoppers from other zones is however limited, with only 15% of respondents in Zone 1 (Ebbw Vale South) indicating they visit at least once a month. Inflows from other zones is lower.

Final Draft

Tredegar Town Centre - Frequency of Visit (Cumulative)	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
At least 5 times a week	2.4%	1.6%	0.0%	0.0%	0.0%	0.0%	9.8%
At least twice a week	9.9%	2.1%	1.7%	1.1%	0.0%	0.0%	41.2%
At least once a week	18.9%	5.2%	4.8%	1.1%	2.4%	0.0%	76.3%
At least once a fortnight	21.1%	6.7%	5.9%	3.0%	2.4%	0.0%	83.1%
At least once a month	24.6%	14.6%	9.6%	4.9%	2.4%	0.0%	88.6%
At least occasionally	37.4%	34.1%	32.0%	17.3%	13.1%	8.7%	93.8%
Never	62.2%	65.4%	66.3%	82.7%	86.9%	91.3%	6.2%
(Don't know / varies)	0.4%	0.5%	1.7%	0.0%	0.0%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 4.28: Frequency of Visits to Tredegar by Zone
Source: 2020 Household Survey Q35

4.82. The most popular reason for visiting the centre is for shopping, with over 90% of all visitors indicating they shop there at least once a month. The bars / pubs and financial / business services are also well used on a monthly basis and around a fifth of respondents also use the other services, cafes / coffee shops and restaurants at least monthly.

Frequency of Visit to Tredegar Town Centre (all respondents visiting centre)	% At least once a week	At least once a month		Never
Food / Non-Food Shopping	72.4%	92.2%		4.4%
Financial /Business Services	17.7%	31.3%		60.7%
To Visit Service Providers	2.8%	24.5%		49.3%
Sports / Health & Fitness	18.1%	20.2%		75.1%
Bars / Pubs	17.9%	47.1%		41.7%
Cafes / Coffee Shops	10.0%	23.8%		66.6%
Restaurants	4.8%	21.4%		65.5%
For Work	9.6%	10.9%		86.7%

Table 4.29: Reasons for and frequency of Visit to Tredegar town centre (All respondents)
Source: 2020 Household Survey Q44

4.83. Usage of the town centre by those respondents in the 'home zone' (Zone 6) is similar to the overall survey responses, with shopping being the primary reason for visiting, followed by the pubs / bars, which over half of respondents use at least monthly. Financial / business services are also well used but 65% of respondents never use the cafes / coffee shops or restaurants.

Final Draft

Frequency of Visit to Tredegar Town Centre (Zone 4 respondents visiting centre)	% At least once a week	At least once a month		Never
Food / Non-Food Shopping	82.3%	97.3%		2.6%
Financial /Business Services	22.3%	36.4%		56.6%
To Visit Service Providers	3.6%	30.0%		40.8%
Sports / Health & Fitness	22.0%	24.6%		72.4%
Bars / Pubs	19.9%	51.9%		37.1%
Cafes / Coffee Shops	12.1%	25.7%		65.3%
Restaurants	4.8%	21.9%		64.8%
For Work	8.2%	9.8%		88.5%

Table 4.30: Reasons for and frequency of Visit to Tredegar town centre (Zone 4 respondents)
Source: 2020 Household Survey Q44

4.84. Despite the high usage of the shops in Tredegar, overall levels of satisfaction with the offer are low, with 65% of respondents indicating they consider the range and quality of shops to be poor or very poor. Just 11% consider it to be at least good. The ease of moving around the centre is however highly rated as is the availability of car parking.

Tredegar Town Centre Ratings	Good or Very Good (%)		Poor or Very Poor (%)
Range and Quality of Shops	10.7%		64.6%
Range and Quality of Places to Eat & Drink	27.6%		38.4%
Availability of Car Parking	56.7%		14.7%
Ease of moving around the Centre	75.6%		4.9%
Attractiveness and Overall Experience	15.4%		48.8%

Table 4.31: Tredegar Town Centre Ratings
Source: 2020 Household Survey Q45

Use of the Other Centres

4.85. Residents in Blaenau Gwent also have relatively easy access to a number of other town centres and retail developments, including those in Merthyr Tydfil to the west and towns to the south. Cardiff City Centre is also easily accessible by both road and public transport.

Final Draft

4.86. As many of these are larger centres or retail parks with a more extensive retail and service offer, it is not surprising that there is degree of expenditure leakage from the County Borough to these alternative locations.

4.87. In terms of market shares, the main convenience draw is to the shops in Merthyr Tydfil with Asda at Dowlais Top attracting 2.5% of all convenience spend and 6.6% of that from the Tredegar area (Zone 6). Other locations in the town attract 1.3% and 1.8% of trade respectively.

4.88. Blackwood is also a major draw, attracting 2.6% of all expenditure and 11.1% of that from Zone 5 (Abertillery). There is also some leakage to stores in Risca, Abergavenny and Cwmbran.

4.89. Comparison leakage is primarily to the Cyfarthfa Retail Park (20.8% of all expenditure), which draws trade from across the study area, with between 16% and 32% of all comparison spend in the zones going there except for Abertillery (Zone 6 - 5.4%).

4.90. The next most popular location is Cwmbran which attracts 12.8% of all spend and 33.3% of that from Abertillery (Zone 5). Cardiff City Centre is also a major draw (7.3%).

4.91. In terms of the frequency of visit to competing town centres, the household survey indicates that trips are more frequent to Cwmbran than Merthyr Tydfil town centre, with 39% of all respondents visiting Cwmbran at least once a month compared with 24% visiting Merthyr. These visits, however, were less frequent than to FSOC which was still trading at the time of the survey.

Cumulative Frequency of Visits	Festival Park, Ebbw Vale	Cwmbran TC	Merthyr TC
At least 5 times a week	0.3%	0.3%	0.4%
2-4 times a week	2.5%	1.0%	1.3%
Once a week	13.5%	8.8%	5.8%
Once a fortnight	25.7%	18.6%	11.7%
At least once a month	43.9%	38.9%	23.9%
Less often	78.2%	67.9%	52.1%
Never	99.5%	99.6%	99.7%
(Don't know / varies)	100.0%	100.0%	100.0%

Table 4.32: Frequency of Visit to destinations outside Blaenau Gwent
Source: 2020 Household Survey Q35

4.92. The reasons for visiting the two centres are dominated by food shopping, with Cwmbran being an important destination for food and drink related visits, followed by other leisure trips. In contrast, Merthyr attracts significantly less of these types of visits but is an important place of work for 9% of respondents.

Final Draft

Reasons for Visiting	Cwmbran Town Centre	Merthyr Town Centre
Food or Non-food Shopping	97.9%	96.3%
To visit restaurants	24.3%	11.6%
To visit cafes / coffee shops	22.3%	8.9%
Leisure (e.g. theatre, cinema, bowling)	8.8%	8.0%
Visit Financial and Business Services	6.6%	8.6%
To visit bars / pubs	5.6%	0.8%
For work	3.5%	8.8%
Sports, health & fitness facilities	0.7%	0.4%
Visit family / friends	0.6%	0.0%
For business	0.4%	0.0%
Market	0.0%	1.4%
Visit other service providers such as hairdressers / barbers, beauty salons or travel agents	0.0%	0.4%

Table 4.33: Reasons for Visiting Cwmbran and Merthyr Tydfil
Source: 2020 Household Survey Q48 & Q49

Final Draft

5. Town Centre Health Checks

5.1. Health checks have been undertaken for the five main centres in Blaenau Gwent and the detailed findings are presented in Appendices 3 - 7.

5.2. These health checks have utilised the results from the annual town centre surveys undertaken by the Council, as well as new data collected from the household survey and site visits. The range of indicators used has had regard to the list of possible measures set out in TAN4 (paragraph 13.3) and includes:

- Retailer representation and change;
- Diversity of uses;
- Accessibility;
- Vacancies, including long term vacancies;
- Customer views;
- Consideration of environmental quality; and
- Perception of safety / occurrence of crime.

5.3. Indicators relating to financial data have not however been used as the normal difficulty of obtaining reliable information for smaller centres has been compounded by the market uncertainties resulting from the Coronavirus pandemic. Similarly, pedestrian flow information is not considered given it is likely to be atypical at the time counts could be undertaken.

5.4. In all cases the catchment of the centres is described and key shopper flows between survey zones reviewed to understand the key draws.

5.5. This is important for understanding whether there is any qualitative demand for new provision or other changes which need to be catered for during the plan period.

Ebbw Vale (Appendix 3)

5.6. Ebbw Vale is a generally healthy town centre with a good convenience and comparison offer and below average vacancies. The streetscape along Bethcar and Market Streets is generally of a high quality and the buildings are relatively well maintained. The centre has a higher proportion of national multiples than the other centres in Blaenau Gwent but is unable to provide the same offer as either Cwmbran town centre or Cyfarthfa Retail Park in Merthyr Tydfil. Further losses within The Walk have the potential to reduce the draw through this area weakening the potential for linked shopping trips from Aldi, a key draw to the centre.

Final Draft

Strengths	Strong comparison offer. High proportion of national multiples. Aldi store within town centre. Relatively low vacancy rate. Attractive streetscape. Recent investment.	Weaknesses/Gaps	Limited food and drink offer other than fast food/takeaways. Limited draw from outside Blaenau Gwent. Elongated nature of centre and separateness of Aldi.
Opportunities	Improved Food & Drink offer Improved evening /night-time offer. Closure of Festival SOC (freeing up retail expenditure). Development of more varied A3 offer including restaurants.	Threats	Further loss of national multiples, especially within The Walk. Closure of Bank. Closure of Festival Park – reducing trade inflows to area.

Table 5.1: SWOT Analysis for Ebbw Vale Principal Town Centre
Source: Appendix 3

Abertillery (Appendix 4)

5.7. Abertillery is a generally healthy and attractive centre but appears to be oversized for its current role, as evidenced by the number of long term vacancies. It benefits from a good range of uses including employment in Anvil Court and a cultural/community offer at The Met. It is also likely to benefit from the draw of the edge-of-centre Tesco. The southern part of the town centre includes a number of buildings of character and The Victorian Arcade but lacks a clear role or focus of offer and the environmental quality of the area is poorer, making it less attractive. There is a need to reduce the size of the centre and consolidate its offer.

Final Draft

Strengths	Good range of town centre uses. Food & Drink draw. The Metropole. Recent investment in key buildings. Attractive and high quality streetscape. Good range of parking. Edge of centre Tesco. Strong independent offer.	Weaknesses/Gaps	Topography making movement more difficult. Number of long term vacancies. Lack of bank. The Arcade does not provide a useful link within the town centre.
Opportunities	Relocation of library and other services to town centre. Development of more varied A3 offer including restaurants. Consolidation of centre.	Threats	Continued decline in key historic buildings.

Table 5.2: SWOT Analysis for Abertillery District Town Centre
Source: Appendix 4

Brynmawr (Appendix 5)

5.8. Brynmawr is a generally healthy centre, despite the lack of national multiples, and benefits from an attractive Market Place area, where the Market Hall cinema is also located. Lakeside Retail Park is a major draw to Brynmawr and the challenge is attract some of these customers into the town centre. At the moment neither the retail or other town centre uses offer a sufficient draw, either individually or combined, meaning the turnover of the centre is low.

Strengths	Proximity of Lakeside Retail Park to the town centre. Strong independent representation. Market Hall Cinema.	Weaknesses/Gaps	Limited food and drink offer. Poor linkage to Retail Park. Dispersed and small car parks.
Opportunities	Market Hall Cinema. Draw of the Retail Park. Good quality, flat space around Market Square. Improved linkage to Retail Park and development of complementary offer. Development of the NMC Factory and Bus Depot site.	Threats	Loss of remaining bank. Further weakening of retail offer. Loss of key tenants at the Retail Park.

Table 5.3: SWOT Analysis for Brynmawr District Town Centre
Source: Appendix 5

Tredegar (Appendix 6)

5.9. Tredegar is a relatively large centre and is generally healthy with average levels of vacancy in terms of floorspace. However, the location and long term nature of the vacancies, particularly within the

Gwent Shopping Centre are a concern and are likely to be weakening the Primary Retail Area. In contrast there is recent and on-going investment in the southern part of the centre, around The Circle, which appears to be well placed to meet the identified shortfall in leisure services including in the restaurant sector. The challenge will be to integrate the two parts of the centre and potentially reduce the amount of retail floorspace provided whilst maintaining the linkages and flows within the centre.

Strengths	Mixture of units (size and age). Lidl providing regular draw. Evidence of recent investment around The Circle. Provision for visitors / tourists.	Weaknesses/Gaps	Poor performance of the Gwent Shopping Centre. Poor provision of food & drink and other leisure services, other than fast food/takeaway. Elongated nature of the centre resulting in a lack of focus. Limited inflows from rest of Blaenau Gwent.
Opportunities	Better integration of two parts of the centre. Strong interest from independents in the centre. Introduction of new uses to Shopping Centre Indoor market (opened 2019).	Threats	Closure of remaining Bank. Loss of national multiples. Continuing vacancies in the Gwent Shopping Centre. Decline in the central part of the centre, discouraging linkage between north & south.

Table 5.4: SWOT Analysis for Tredegar District Town Centre
Source: Appendix 6

Blaina (Appendix 7)

5.10. Blaina is a weak centre in its current form as it contains a large number of vacant units, a considerable proportion of which have been vacant long-term. Several the properties are also in poor condition. The nature of the centre also means that those shops and businesses which are trading well and serving the local community are dispersed throughout the centre, reducing their impact and ability to support each other.

Final Draft

Strengths	Good anchor convenience store. Used by people working in area.	Weaknesses/Gaps	Dispersed nature of town centre offer. Limited choice of convenience outlets. Narrow roads and two way traffic. Restricted catchment area.
Opportunities	Some attractive older properties. Improved independent offer.	Threats	Increased vacancies. Closure of Post Office.

Table 5.5: SWOT Analysis for Blaina Local Town Centre
Source: Appendix 7

Overall Conclusions on Town Centre Health

5.11. The period since the LDP was adopted in 2012 has been one where, based on national trends, it would have been expected that the town centres of Blaenau Gwent would have experienced particularly difficult trading conditions, given their positions within the South Wales retail hierarchy and the considerable competition seen from centres such as Cardiff and Cwmbran and out of centre provision in neighbouring Merthyr Tydfil.

5.12. For various reasons, the planned for growth in the County Borough's retail offer has not been realised, with extant planning permissions not implemented, but overall, the centres appear to have been relatively robust and have seen more limited changes than might have been expected.

5.13. In contrast, the FSOC has seen a major decline, which is likely to have come about as a result of the structural changes being seen in the retail sector, such as the rise in internet shopping and company rationalisations and local circumstances which have seen a significant increase in 'local' provision. This includes development in Merthyr Tydfil, Newport and, more historically Cardiff (St Davids 2 opened in 2009).

5.14. The experiences of 2020 have led to an increased interest /reliance on shopping more locally as well as more online shopping. There has also been a move away from some of the larger town and city centres given the increased working from home and unwillingness to use public transport.

5.15. It is not currently clear which of these trends will continue in the long term, but the indications are that centres serving more local catchments may benefit from the recent changes and certainly recent events offer a new impetus to change shopping behaviour more permanently. If so, then the town centres in the Welsh Valleys including in Blaenau Gwent could see a major improvement in their use – provided existing businesses remain trading and can reopen once restrictions ease.

Final Draft

6. Retail Capacity – Quantitative Assessment and Qualitative Need

6.1. PPW is explicit that when assessing retail needs for the purposes of considering whether there is a requirement to allocate sites for development, precedence should be given to establishing quantitative needs, with convenience and comparison floorspace assessed separately.

6.2. The Welsh Government does not prescribe any particular methodology for undertaking needs assessments but paragraph 6.3 of TAN4 indicates that they usually include:

- Existing and forecasted population levels and distribution;
- Forecast expenditure for specific classes of goods to be sold, within the broad categories of comparison and convenience goods;
- Sales density data for both existing and future retail provision which is realistic and benchmarked against similar retail developments in the area; and
- Catchment areas for centres.

Household Survey

6.3. The necessary information on current shopping patterns required to inform this quantitative capacity assessment has been derived from a household survey undertaken by NEMS Market Research in June / July 2020. Some of the qualitative findings from this survey have been discussed above.

6.4. A total of 637 interviews were undertaken across a series of 6 zones that reflect the settlement distribution. A map of the study area and the questionnaire are provided in Appendix 1, with the full (weighted) survey results provided in Appendix 2.

6.5. The survey was undertaken shortly after the first lockdown as a result of the Covid-19 pandemic and as such included questions on shopping behaviour before and during the lockdown, with the former used to inform the quantitative capacity analysis provided here.

Convenience and Comparison Capacity for Retail Floorspace

6.6. The quantitative retail capacity assessment seeks to provide an estimate of the retail capacity in the area and forecast how it is expected to change during the plan period. It then seeks to estimate how much of the available expenditure will be available to support retail outlets in the form of physical stores and how much is likely to be spent elsewhere through Special Forms of Trading (SFT).

6.7. This latter expenditure primarily relates to expenditure made online via the internet and forecasts are adjusted to reflect those online orders that are fulfilled from warehouses such as Amazon, and those where the goods are actually sourced from a store, which is the norm for most convenience shopping orders. SFT also includes sales made via mail order / catalogue shopping and in markets.

6.8. The methodology and associated tables to forecast retail capacity are provided in Appendix 8. The overall quantitative retail capacity requirements for physical stores (i.e. excluding SFT) are provided in Tables A8.28 and A8.29, and are reproduced below:

Final Draft

Table A8.28: Convenience Capacity - Blaenau Gwent (Base excluding Commitments)

		2018	2020	2025	2030	2033
Total Available Convenience Expenditure in Study Area (£m)	(a)	£136.68	£143.00	£134.01	£131.57	£130.32
Current Market share of Convenience destinations in study area	(b)	89.9%	89.9%	89.9%	89.9%	89.9%
Available Convenience Expenditure for destinations in study area	(c)	£122.93	£128.62	£120.53	£118.34	£117.22
Change in available spend to study area destinations (cumulative from 2018)	(d)		£5.68	-£2.40	-£4.59	-£5.72
Turnover of Convenience destinations (assuming no change in provision or sales efficiences)	(e)	£122.94	£122.94	£122.94	£122.94	£122.94
Turnover of Convenience destinations (allowing for changes in sales efficiences)	(f)	£122.94	£126.99	£122.84	£124.690	£125.816
Residual Convenience spend to support new convenience floorspace (cumulative) (£m)	**(g)**		£1.63	-£2.31	-£6.35	-£8.60
Benchmark Sales density for Convenience Floorspace (£ per sqm)	(h)		£9,812	£9,482	£9,736	£9,736
Amount of new convenience floorspace required (cumulative) (sqm net)	**(j)**		**166**	**-243**	**-652**	**-883**

Table A8.29 : Comparison Capacity - Blaenau Gwent (Base excluding Commitments)

		2018	2020	2025	2030	2035
Total Available Comparison Expenditure in Study Area	(a)	£149.33	£131.90	£155.60	£172.21	£183.88
Current Market share of Comparison destinations in study area	(b)	46.0%	46.0%	46.0%	46.0%	46.0%
Available Comparison Expenditure for destinations in study area	(c)	£68.67	£60.66	£71.56	£79.20	£84.56
Change in available spend to study area destinations (cumulative)	(d)		-£8.02	£2.88	£10.52	£15.89
Turnover of Comparison destinations (assuming no change in provision or sales efficiences)	(e)	£68.68	£68.68	£68.68	£68.68	£68.68
Turnover of Comparison destinations (allowing for changes in sales efficiences)	(f)	£68.68	£61.41	£74.48	£85.42	£93.07
Residual Comparison spend to support new comparison floorspace (cumulative)	**(g)**		**-£0.75**	**-£2.92**	**-£6.23**	**-£8.51**
Benchmark Sales density for Comparison Floorspace (£ per sqm)	(h)		£4,450	£5,410	£6,971	£6,971
Amount of new comparison floorspace required (cumulative) (sqm net)	**(i)**		**-169**	**-540**	**-893**	**-1,221**

Table 6.1: Retail Capacity Summary
Source: Appendix 8, Tables A8.28 & A8.29

6.9. This purely quantitative assessment suggests that even before allowing for known retail commitments and allocations, there is already more than sufficient convenience and comparison floorspace within Blaenau Gwent to meet the identified needs during the plan period. A small convenience capacity at 2020 is more than offset by the anticipated improvement in the performance of existing outlets and increased SFT sales in subsequent years, resulting in a theoretical need to reduce convenience floorspace by 883 sqm net by 2033 and comparison by 1,221 sqm.

6.10. This represents a significant change since the LDP was adopted in 2012 but is consistent with the lack of interest in taking up many of the committed and planned retail development proposals during much of the plan period. The more recent interest in the NMC Factory and Bus Depot site is the exception to this and a retail development is now under construction on the site (see below).

6.11. It is also important to recognise that this assessment relies on a number of key assumptions, changes to which would inevitably alter the capacity forecasts. These include:

Final Draft

- Assuming that the current market share of centres is not hiding any qualitative need for additional provision that can be evidenced from significant over-trading in a particular store / location; and
- Assuming that the Blaenau Gwent centres will continue to achieve the same market share in the future as they are achieving now.

6.12. It should also be noted that all the figures exclude any committed retail schemes (i.e. those with planning permission) or sites that are allocated in the Local Plan.

6.13. These matters are considered in more detail below.

Benchmark Performance and Potential Overtrading

6.14. The above analysis assumes that there is currently no unmet demand for additional retail provision that is being 'hidden' by existing stores trading at exceptionally high levels of turnover. Were this to be the case, this would suggest that additional provision is required.

6.15. To assess this, we have compared the estimated convenience and comparison turnovers of the centres with the estimated floorspace in these centres and calculated the sales densities being achieved. The results are set out below:

Centre	Number of Units				Floorspace (sqm)				Turnover (£m)			Sales Density (£ per sqm)	
	Total	Conv	Comp	Vacant (A Class)	Total	Conv	Comp	Vacant (A Class)	Conv	Comp	Total	Conv	Comp
Abertillery	115	12	21	23	10,181	1,375	2,986	1,213	£3.29	£4.57	£7.86	£2,393	£1,530
Blaina	42	2	6	16	3,765	989	533	1,138	£1.23	£1.13	£2.36	£1,244	£2,120
Brynmawr	103	9	22	11	10,188	700	3,011	937	£0.65	£3.76	£4.41	£929	£1,249
Ebbw Vale	113	9	41	11	22,691	4,379	10,296	1,049	£27.13	£19.83	£46.96	£6,195	£1,926
Tredegar	153	10	36	34	20,783	2,918	7,516	2,378	£9.62	£6.01	£15.63	£3,297	£800

Centre	Number of Units				Estimated Net Floorspace (sqm)				Turnover (£m)			Sales Density (£ per sqm)	
	Total	Conv	Comp	Vacant (A Class)	Total	Conv	Comp	Vacant (A Class)	Conv	Comp	Total	Conv	Comp
Abertillery	115	12	21	23		963	2,538		£3.29	£4.57	£7.86	£3,418	£1,801
Blaina	42	2	6	16		692	453		£1.23	£1.13	£2.36	£1,777	£2,494
Brynmawr	103	9	22	11		490	2,559		£0.65	£3.76	£4.41	£1,327	£1,469
Ebbw Vale	113	9	41	11		3,065	8,752		£27.13	£19.83	£46.96	£8,851	£2,266
Tredegar	153	10	36	34		2,043	6,389		£9.62	£6.01	£15.63	£4,710	£941

Notes
Convenience floorspace estiamted at 70% of gross
Comparison floorspace estimated at 85% of gross

Table 6.2: Sales Densities for Blaenau Gwent Centres
Source: Health Checks (Appendices 3 – 7)

6.16. Whilst it is normal for sales densities to vary between retailers and locations and for them to be lower for independent retailers and in smaller centres, the above levels are considerably below the national averages used above to calculate the base capacity figures (£9,812 per sqm for convenience and £4,450 per sqm for comparison). They are also generally at the lower end of expectations with convenience multiples usually achieving sales densities of in excess of £7,000 per sqm, and comparison retailers over £3,000 per sqm.

6.17. There is therefore no evidence to suggest any centre is over-trading and thus there is no qualitative need for additional provision. On the contrary, it may also mean that the above floorspace capacity

Final Draft

(i.e. surplus) figures are in practice understated and that more floorspace should be taken out of use during the plan period than this analysis suggests.

Constant Market Shares

6.18. The other key assumption in the capacity analysis is that the current market shares achieved by the Blaenau Gwent centres will not change over time. This is a common assumption in retail assessments but one which is difficult to predict with confidence and is one of the reasons why retail capacity assessments should be updated on a regular basis to reflect changes in shopping preferences, behaviour and provision.

6.19. However, it is generally reasonable to assume that, unless there is a significant change in the retail offer, whether in terms of a significant new opening or increased competition from another centre / location, then shoppers will continue to shop as they have before. In such circumstances market shares would not change.

6.20. In this case there are a number of proposed developments in the County Borough and these are considered in more detail below. However, there is no major new proposal that would be expected to change shopping patterns significantly. We are also not aware of any new major proposals in neighbouring authorities that might increase outflows.

6.21. The only change that is apparent is the recent closure of most of the FSOC, which was still trading at the time of the household survey. As a result, it was recorded as achieving a 5.1% market share of the study area's comparison trade, equating to a turnover of £6.77m from the study area and £13.55m allowing for inflow.

6.22. It is unlikely that the trade that was coming to the Outlet Centre from outside the County Borough would be transferred to other outlets in the Borough, as the offer in Ebbw Vale town centre, the nearest alternative, is not the same and is unlikely to differ significantly from that provided closer to home for those previously visiting. However, whether any of the trade from the Blaenau Gwent area would be diverted to one of the County Borough centres given their proximity, needs further consideration.

6.23. The propensity for Ebbw Vale or any of the other centres to attract the expenditure previously going to the FSOC will depend primarily on where the closest alternative product can be secured. The household survey indicates that the Outlet Centre was attracting:

- 10.0% of expenditure on clothing and footwear;
- 0.3% of expenditure on personal care items;
- 13.6% of expenditure on recreational goods;
- 0.3% of expenditure on audio visual goods;
- 0.7% of expenditure on furniture, carpets & floor coverings;
- 5.8% of expenditure on items for the house;
- 1.9% of expenditure on personal items;

Final Draft

- 7.0% of expenditure on books and stationery; and
- 0.5% of expenditure on DIY, garden and pet goods.

6.24. The household survey also indicates that:

- The majority of available spend on clothing and footwear is already leaking from the area to Cyfarthfa Retail Park, Cwmbran town centre or Cardiff City Centre or is being spent online;
- The majority of spend on recreational goods is made online but Ebbw Vale currently attracts 17.5% of all available expenditure;
- Around a quarter of available expenditure on items for the house is spent online, with Ebbw Vale town centre the third most popular destination after the Cyfarthfa Retail Park. B&M at Rhyd-y-Blew, Tesco at Ebbw Vale, the shops at the Lakeside Retail Park and Abertillery and Tredegar town centres also attract some trade; and
- Around a third of expenditure on books and stationery is spent online with the rest spent in a wide range of locations including Ebbw Vale Town Centre, Tesco at Ebbw Vale, Lakeside Retail Park and Abertillery and Tredegar town centres.

6.25. It would therefore seem likely that the Blaenau Gwent centres would only be able to attract a small amount of the expenditure 'freed up' by the closure of Festival Park, primarily that spent on recreational goods and items for the house much of which could be expected to go to Ebbw Vale town centre.

6.26. There would also be a small uplift in available spend on personal care items, audio visual goods, furniture, carpets & floor coverings, items for the house, personal items and books and stationery that could benefit a range of locations in Blaenau Gwent.

6.27. The effect of this may be to slightly improve the performance and market share of the Blaenau Gwent centres, particularly Ebbw Vale compared to their current market shares. However, they are only likely to retain a small proportion of the overall trade previously going to the FSOC, with the main beneficiaries being online retailers.

6.28. Given that all the centres in Blaenau Gwent have potential to improve the trading performance of existing businesses (i.e. to improve the sales densities achieved) and there are vacant retail units available to meet any increased demand from retailers as a result of the closure, we therefore do not consider that this affects the conclusions set out above, namely that there is no quantitative capacity for additional retail floorspace in the plan period.

Committed Developments

6.29. The final consideration is whether the above figures should be adjusted to allow for existing planning commitments, although in practice the effect of doing so would simply be to increase the quantum of oversupply that has already been identified.

6.30. Previous retail allocations and permissions were assessed in the 2017 Retailing Background Paper, but none were progressing at that time.

Final Draft

6.31. The commitment at Rhyd-y-Blew would appear to have been commenced (Ref: R1.1) and as such the permission for 6,000 sqm of non-food retail floorspace remains extant. However, it seems unlikely to be implemented.

6.32. Similarly, we consider it unlikely that either of the proposal sites at Southern Gateway or Market Square in Ebbw Vale will come forward as previously envisaged. The planning permissions at Festival Park (Ref: R1.2) and Tesco, Ebbw Vale (Ref: R1.3) have expired.

6.33. The only other scheme we are aware of is the planned redevelopment of the NMC Factory and Bus Depot site in Brynmawr. Planning permission has been granted for a retail and F&B development on the site and this will further reduce the forecast comparison capacity in the County Borough once trading.

Qualitative Retail Needs

6.34. Whilst precedence is given to quantitative need when undertaking an assessment of retail need, PPW also sets out instances when it may be appropriate to give weight to qualitative needs in emerging development plan policies, specifically where:

- The identified need would support the objectives and retail strategy being proposed;
- The centre is highly accessible by walking, cycling or public transport;
- Development will contribute to a substantial reduction in car journeys;
- Contributes to the co-location of facilities in an existing centre;
- Significantly contributes to the vibrancy, attractiveness and viability of a centre;
- Assists in alleviating over-trading or local traffic congestion; or
- Addresses locally defined deficiencies in provision, including a lack of convenience provision in a disadvantaged area.

6.35. Some of these needs may arise from other decisions regarding plan objectives and policies and as such it is not appropriate for us to comment at this stage. However, from our assessment of the Blaenau Gwent centres we have not identified any areas of local deficiency or areas where new retail development is necessary to contribute to the vibrancy, attractiveness or viability of any of the centres.

6.36. We therefore conclude that there will be no need to identify additional sites for retail development during the plan period, although, for the reasons set out above, longer term quantitative capacity figures should be treated with a degree of caution and should be updated on a regular basis.

6.37. Given the extraordinary events of 2020, we would also suggest that a regular review of qualitative needs is undertaken, as retail provision and shopping habits may change significantly within the plan period.

Final Draft

7. Leisure Uses and Future Capacity

7.1. Leisure uses have always been an important element of a town centre offer but their relative significance has increased in recent years, as spend on eating out and other leisure activities has increased, whilst spending at shops in town centres has faced the various challenges detailed above.

7.2. This is recognised in national planning policy, with PPW noting that "*Leisure and entertainment, and food and drink uses can benefit retail and commercial centres, and with adequate attention to safeguarding amenities can contribute to a successful evening economy. In addition to general diversity of uses, mixed use developments, which combine retailing with entertainment, restaurants and, where appropriate, residential in a comprehensive and planned way should also be encouraged where appropriate to promote lively centres during both the day and the evening*" (PPW, paragraph 4.3.34).

7.3. However, PPW does not define what is meant by leisure uses, nor are all leisure uses suitable for a town centre location. It is also clear that the uses intended to be covered by the terms are not restricted to those falling within Use Class D2 Assembly and Leisure.

7.4. Therefore, when seeking to consider leisure uses in the context of town centres, the term is normally considered to relate primarily to activities/businesses offering:

- Food and Drink;
- Some service-related activities;
- Indoor entertainment; and
- Indoor sports and recreation activity.

7.5. Thus, leisure encompasses uses with Use Class A1 (retail service), A3 (Food and Drink), C1 (Hotels), D1 (Non-residential institutions), D2 (Assembly and Leisure) and some Sui generis uses.

Existing Leisure Provision

7.6. The existing leisure offer in Blaenau Gwent's town centres is mainly related to the Food and Drink sector (Use Class A3). Use of sports and health and fitness facilities is also good where provided, although not all such facilities are located within the town centres.

Proportion of all visitors to centre undertaking activity at least once a month	Ebbw Vale	Abertillery	Brynmawr	Tredegar	Blaina
Visit sports / health & fitness facilities	14.6%	24.1%	3.3%	20.2%	0.5%
Visit Bars / Pubs	21.4%	37.1%	18.6%	47.1%	9.1%
Visit cafes / Coffee Shops	23.2%	33.3%	12.3%	23.8%	9.3%
Visit Restaurants	17.4%	26.3%	17.5%	21.4%	6.8%

Table 7.1: Leisure visits to town centres
Source: 2020 Household Survey

Final Draft

7.7. Other leisure-related provision is as follows:

Leisure Uses	Ebbw Vale	Abertillery	Brynmawr	Tredegar	Blaina
Museum	*Yes*	**YES**	**YES**	**YES**	*Yes*
Public library	**YES**	*Yes*	**YES**	**YES**	*Yes*
Public hall / Social Club	**YES**	*Yes*	**YES**	*Yes*	**YES**
Night club	**YES**	**YES**		**YES**	
Cinema			**YES**		
Concert hall / Theatre	*Yes*	**YES**		**YES**	*Yes*
Amusement Arcade	**YES**	**YES**		**YES**	
Indoor sports facilities	*Yes*	*Yes*	**YES**	**YES**	
Hotel / Guest House	*Yes*			**YES**	

Uses shown in bold are provided within the currently defined town centre

Uses shown in Italics are available in the town but outside the town centre

Table 7.2: Other leisure uses in Blaenau Gwent

Source: Various

7.8. Food and drink uses are also important for town centres as they make up a considerable proportion of the existing occupiers and floorspace. However, in the Blaenau Gwent centres provision is generally below the UK average. Only Abertillery is (marginally) above, whilst provision in Ebbw Vale is particularly low.

% Town Centre Units/ Floorspace in Food and Drink Use (A3)	Units (%)	Floorspace (%)
Abertillery	20.9%	20.9%
Brynmawr	18.4%	15.6%
Ebbw Vale	15.0%	8.8%
Tredegar	15.7%	12.8%
Blaina	16.7%	15.9%
UK Average (2018)	19.8%	15.4%

Table 7.3: % Units in A3 Uses

Source: 2019 Town centre surveys and Goad (2018)

7.9. The difference in offer is more pronounced when the type of food and drink provision is considered. Blaenau Gwent centres have very high levels of fast food & takeaway provision, in most cases more than double the UK average in terms of the number of units. There is also a higher provision of cafes but very low 'restaurant' provision.

Centre	% of A3 Food & Drink Units 2019				
	Café	Restaurant	Public House / Bars & Wine Bars	Fast Food & Takeaway	Total
Abertillery	25%	0%	29%	46%	100%
Brynmawr	16%	5%	21%	58%	100%
Ebbw Vale	29%	0%	18%	53%	100%
Tredegar	29%	0%	21%	50%	100%
Blaina	14%	0%	29%	57%	100%
UK Average (2018)	9%	24%	43%	24%	100%

Table 7.4: Type of A3 Uses by Unit

Source: 2019 Town centre surveys and Goad (2018)

Final Draft

7.10. A similar pattern emerges when floorspace is considered, although there is greater variation between centres.

Centre	% of A3 Food & Drink Floorspace 2019				
	Café	Restaurant	Public House / Bars & Wine Bars	Fast Food & Takeaway	Total
Abertillery	16%	0%	53%	31%	100%
Brynmawr	15%	9%	41%	35%	100%
Ebbw Vale	20%	0%	35%	45%	100%
Tredegar	24%	0%	43%	33%	100%
Blaina	10%	0%	58%	33%	100%
UK Average (2018)	17%	28%	37%	19%	100%

Table 7.5: Type of A3 Use by Floorspace
Source: 2019 Town centre surveys and Goad (2018)

Leisure Trends and Future Capacity / Demand

7.11. The quantitative capacity for other town centre uses including leisure uses is more difficult to assess than for retail, given the wide variety of other uses that the term can be applied to and the lack of reliable data to indicate what may be an appropriate level of provision in a particular centre or area. There is also the unknown impact of Covid-19 to consider, as this is likely to impact on both existing businesses in the sector and people's future willingness to participate in such activities.

7.12. However, there are many uses that are or could be accommodated in the Blaenau Gwent town centres and where the available expenditure locally is significant. A number of key examples are set out below. This includes a possible £25.25m available for spending on restaurant and café meals, £11.47m for alcoholic drinks (consumed away from home) and a total of £19.72m for takeaway meals and snacks.

Other Town Centre Available Expenditure 2018 (£m in 2018 prices)	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total All Zones
Total Leisure	£28.88	£24.19	£23.38	£10.88	£32.38	£34.96	£154.67
Hairdressing salons and personal grooming establishme	£0.72	£0.65	£0.62	£0.26	£0.78	£0.91	£3.93
Cinema, theatre and museums etc.	£0.48	£0.46	£0.40	£0.17	£0.50	£0.61	£2.61
Admissions to clubs, dances, discos, bingo	£0.16	£0.13	£0.14	£0.06	£0.18	£0.20	£0.87
Subscriptions for leisure activities and other subscriptio	£0.08	£0.07	£0.07	£0.03	£0.09	£0.11	£0.45
Spectator sports: admission charges	£0.06	£0.06	£0.06	£0.02	£0.07	£0.08	£0.34
Participant sports (excluding subscriptions)	£0.14	£0.14	£0.12	£0.05	£0.15	£0.18	£0.79
Subscriptions to sports and social clubs	£0.26	£0.25	£0.23	£0.10	£0.28	£0.33	£1.45
Leisure class fees	£0.28	£0.24	£0.23	£0.10	£0.29	£0.33	£1.47
Hire of equipment for sport and open air recreation	£0.01	£0.01	£0.01	£0.00	£0.01	£0.01	£0.04
Restaurant and café meals	£4.55	£4.33	£3.96	£1.70	£4.80	£5.91	£25.25
Alcoholic drinks (away from home)	£2.12	£1.86	£1.75	£0.78	£2.33	£2.62	£11.47
Take away meals eaten at home	£1.88	£1.59	£1.60	£0.70	£2.09	£2.26	£10.11
Other take-away and snack food	£1.79	£1.47	£1.50	£0.69	£2.02	£2.14	£9.61
Contract catering (food)	£0.11	£0.10	£0.09	£0.04	£0.12	£0.14	£0.61

Table 7.6: Available Expenditure for selected leisure activities 2018
Source: Experian

7.13. With leisure spend overall expected to increase by between 0.9% and 2.9% per annum from 2023 onwards, and by considerably more than that in 2021 and 2022 after the sharp decline in 2020, it is clear that the role of leisure and retail services within town centres will continue to be important during the plan period. Further, given that the majority of services and leisure activities require a physical presence at the business location, the uses can contribute to the vitality of a town centre.

7.14. There would also appear to be a qualitative need to improve the mix of A3 uses within the Blaenau Gwent centres to better reflect the expenditure available to spend on eating out in cafes /

restaurants compared with fast food & takeaways. The former uses also support the vitality of town centres to a greater extent than fast food and takeaway uses as they are both more likely to be open at the same time as the retail uses (i.e. during the daytime trading hours) and have greater potential to increase the dwell-time of visitors.

Policy Response

7.15. The current LDP contains a number of policies which make reference to leisure provision and a number of sites have been identified where leisure uses have previously been considered appropriate as part of mixed-use developments. These allocations, however, primarily relate to the more formal type of sports and leisure uses on sites outside of town centres.

7.16. Within town centres, the main demand for leisure uses is likely to come from the food and drink sector, although national planning policy continues to require other uses to be the subject of the sequential approach to development, meaning where appropriate, such uses should also be accommodated centrally.

7.17. For food and drink however, town centre policies need to carefully consider the types of A3 uses that can be supported, given the current imbalance in the mix and varying contributions of the sector to town centre vitality and viability. This means seeking to encourage those A3 uses which are used during the daytime and therefore support and complement the retail offer in the town centre.

7.18. It also means seeking to expand the variety of offer that may be available during the evening periods to appeal to a greater cross-section of visitors. A more varied offer, including more restaurants and potentially a wider range of drinking establishments and linked leisure activities should therefore be encouraged.

7.19. This is most likely to be achieved by minimising the areas within town centres that are subject to blanket restrictions on uses and using a criteria-based approach to assess planning applications on their merits. This is appropriate given both the wide range of uses encompassed by the A3 Use Class and the potential for businesses in the future to offer a more blended mix of uses that may not correspond to existing Use Class definitions.

Final Draft

8. Review of Existing Retail, Leisure and Town Centre Planning Policies

8.1. The current planning policies for Blaenau Gwent's town centres are set out in the adopted LDP and have been summarised in Section 2 above. These policies are reviewed below in the light of the findings from this study.

8.2. First however, we consider the areas and centres to which policies should apply, by both reviewing the retail hierarchy for the County Borough and then the areas which should be within the defined town centres and Primary Retail Areas.

Retail Hierarchy

8.3. The existing retail hierarchy is set out in Policy SP3 and defines four levels of centre:

- Principal Town Centre – Ebbw Vale (sub-regional role);
- District Town Centres – Abertillery, Brynmawr and Tredegar, with Brynmawr linked to the retail provision at the Lakeside Retail Park;
- Local Town Centre – Blaina; and
- Neighbourhood Centres.

8.4. Ebbw Vale is a higher order centre than the others in County Borough, although it contains fewer units in total than Tredegar as the Table below illustrates. However, when the size of units is considered, retail provision is greater and includes more national multiples. This is reflected in the centre turnover, which is around three times greater than Tredegar.

Centre	Number of Units				Floorspace (sqm)				Turnover (£m)		
	Total	Conv	Comp	Vacant (A Class)	Total	Conv	Comp	Vacant (A Class)	Conv	Comp	Total
Abertillery	115	12	21	23	10,181	1,375	2,986	1,213	£3.29	£4.57	£7.86
Blaina	42	2	6	16	3,765	989	533	1,138	£1.23	£1.13	£2.36
Brynmawr	103	9	22	11	10,188	700	3,011	937	£0.65	£3.76	£4.41
Ebbw Vale	113	9	41	11	22,691	4,379	10,296	1,049	£27.13	£19.83	£46.96
Tredegar	153	10	36	34	20,783	2,918	7,516	2,378	£9.62	£6.01	£15.63

Table 8.1: Town Centre Retail Provision and A Class Vacancies
Source: Health Check Proformas (Appendices 3 – 7)

8.5. The three District Town Centres are also appropriately considered as second tier centres:

- **Tredegar** is the largest of the three centres and has both a more extensive comparison retail offer, including a number of national multiples, and a higher level of turnover. However, this is primarily due to the performance of the Lidl store and the centre's comparison offer is more limited. As such it should remain a second tier (i.e. District) town centre;
- **Abertillery** is a smaller retail centre than Tredegar and has a lower turnover, but the latter difference is mainly due to the main food store in Abertillery (Tesco) being outside the town centre boundary. In other respects, the centre is similar to Tredegar and should be at the same level in the retail hierarchy; and
- **Brynmawr** is a relatively large centre in terms of the number of units it contains and the retail floorspace that it provides, but turnover levels are relatively low as a result of the main retail offer being located at Lakeside Retail Park. In terms of retail turnover when considered separately from the Retail Park, it would appear to serve more of a local town centre role.

Final Draft

However, it also has an important retail service and financial / business role, consistent with its current designation as a District Town Centre.

8.6. We therefore consider that the Principal and District Town Centres designations remain appropriate.

8.7. The identification of Blaina as the only Local Town Centre is less convincing, as the centre does not appear to serve more than its immediate neighbourhood, nor would it be expected to, given its relative proximity to Brynmawr and Abertillery.

8.8. We have therefore compared the provision in the centre with that in the neighbourhood centres and the results are set out below:

Neighbourhood Centres	A1	A2	A3	B1	B8	C1	C3	D1	D2	SG	Vacant	Total Units
Attlee Way,Tredegar	20% (1)	0% (0)	20% (1)	0% (0)	0% (0)	0% (0)	0% (0)	40% (2)	0% (0)	0% (0)	20% (1)	5
Park Place, Tredegar	14.2% (1)	0% (0)	28.6% (2)	0% (0)	0% (0)	0% (0)	28.6% (2)	28.6% (2)	0% (0)	0% (0)	0% (0)	7
Queensway, Garnlydan, Ebbw Vale	50% (2)	0% (0)	25% (1)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	25% (1)	0% (0)	4
Beaufort Rise, Ebbw Vale	32% (7)	4.5% (1)	9% (2)	0% (0)	0% (0)	4.5% (1)	41% (9)	4.5% (1)	0% (0)	0% (0)	4.5% (1)	22
Cambridge Gardens Ebbw Vale	33.3% (1)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	33.3% (1)	0% (0)	33.3% (1)	0% (0)	3
Tredegar Rd, Hilltop, Ebbw Vale	50% (2)	0% (0)	25% (1)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	25% (1)	4
Church Street, Ebbw Vale	12% (5)	3% (1)	14% (5)	3% (1)	0% (0)	0% (0)	28% (10)	8% (3)	0% (0)	3% (1)	39% (10)	36
Park Place Waunlwyd Ebbw Vale	28.6% (2)	0% (0)	28.6% (2)	0% (0)	0% (0)	0% (0)	28.6% (2)	0% (0)	0% (0)	0% (0)	14.2% (1)	7
Marine Street, Cwm, Ebbw Vale	29% (8)	0% (0)	11% (3)	0% (0)	0% (0)	0% (0)	50% (14)	0% (0)	0% (0)	3% (1)	7% (2)	28
Mill Terrace, Cwm, Ebbw Vale	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	72% (5)	0% (0)	0% (0)	14% (1)	14% (1)	7
Canning Street, Cwm, Ebbw Vale	5.5% (1)	5.5% (1)	5.5% (1)	0% (0)	5.5% (1)	0% (0)	50% (9)	11% (2)	0% (0)	17% (3)	0% (0)	18
Alexandra Road, Abertillery	50% (2)	0% (0)	25% (1)	0% (0)	0% (0)	0% (0)	25% (1)	0% (0)	0% (0)	0% (0)	0% (0)	4
Commercial Road, Abertillery	24% (5)	0% (0)	5% (1)	0% (0)	0% (0)	0% (0)	38% (8)	0% (0)	0% (0)	5% (1)	28% (6)	21
Walters Avenue Swffryd	50% (3)	0% (0)	16.6% (1)	0% (0)	0% (0)	0% (0)	0% (0)	16.6% (1)	0% (0)	16.6% (1)	0% (0)	6
Blaina	22.1% (12)	4% (2)	15% (8)	1.9% (1)	0% (0)	0% (0)	22.6% (12)	1.9% (1)	0% (0)	7.5% (4)	25% (13)	53

Table 8.1: Local and Neighbourhood Centres in Blaenau Gwent
Source: 2019 Centre surveys

8.9. This confirms that Blaina is larger than any of the neighbourhood centres with 12 units in A1 retail use, compared to 8 in the next largest centre of Marine Street, Cwm. However, the nature of the offer and its primary purpose of meeting the needs of its local community is not considered to be significantly different. We would therefore suggest that, regardless of the terminology used to refer to the centre, there is no requirement to distinguish between Blaina and the neighbourhood centres in retail policy terms.

Town Centre Boundaries and Primary Retail Areas

8.10. The delineation of town centres on the Proposals Map represents an important element of policy as it will determine how the 'town centre first' approach operated by the Welsh Government is applied.

8.11. In practical terms this may require balancing a desire to define a larger centre able to accommodate future retail and commercial uses against a more restricted approach that seeks to consolidate the town centre offer where demand for new provision is more limited. Any definition of an area is also intrinsically linked to the specific policies that are applied.

8.12. In the case of Blaenau Gwent, there would be benefits in seeking to consolidate a number of the centres but the local geography and distribution of existing uses within the centres does not make such an approach straightforward.

8.13. The town centre boundaries for the three levels of town centres are currently shown on the Proposals Map and in Appendix 5 of the LDP, whilst Primary Retail Areas (PRAs) are defined by Policy DM5 for the four largest centres.

Final Draft

8.14. Our analysis above has confirmed that the national trends are towards reduced demand for retail floorspace in the future and we have not identified any quantitative or qualitative need for additional retail provision within Blaenau Gwent. This means that there is no underlying need to seek to increase the size of the existing town centres.

8.15. Our analysis has also shown that the relative importance of retail to town centre vitality and viability is in decline, with the most successful centres being those that have a wider service and leisure offer, in addition to retail. As a result, going forward policies promoting healthy and vital town centres will need to be less reliant on the retail offer.

8.16. We therefore recommend that:

- The town centre boundaries for the Blaenau Gwent centres need to be reviewed, with a view to potentially reducing the size of the town centres rather than expanding them; and
- The core retail areas of the centres, previously referred to as PRAs, also need to be reviewed and reduced in extent, given the reduced demand for retail floorspace that is anticipated in the future.

8.17. We also think it is important that the subsequent policies applied to these defined areas should be centre specific.

8.18. Our comments on each of the centres is set out below.

Ebbw Vale

8.19. Whilst previously allocated sites in Ebbw Vale have not come forward for retail development, Ebbw Vale town centre does not have a significant oversupply of retail floorspace. As the principal centre in the County Borough, it also offers a range of other town centre uses within it. As a result, we consider the current town centre boundary remains largely appropriate.

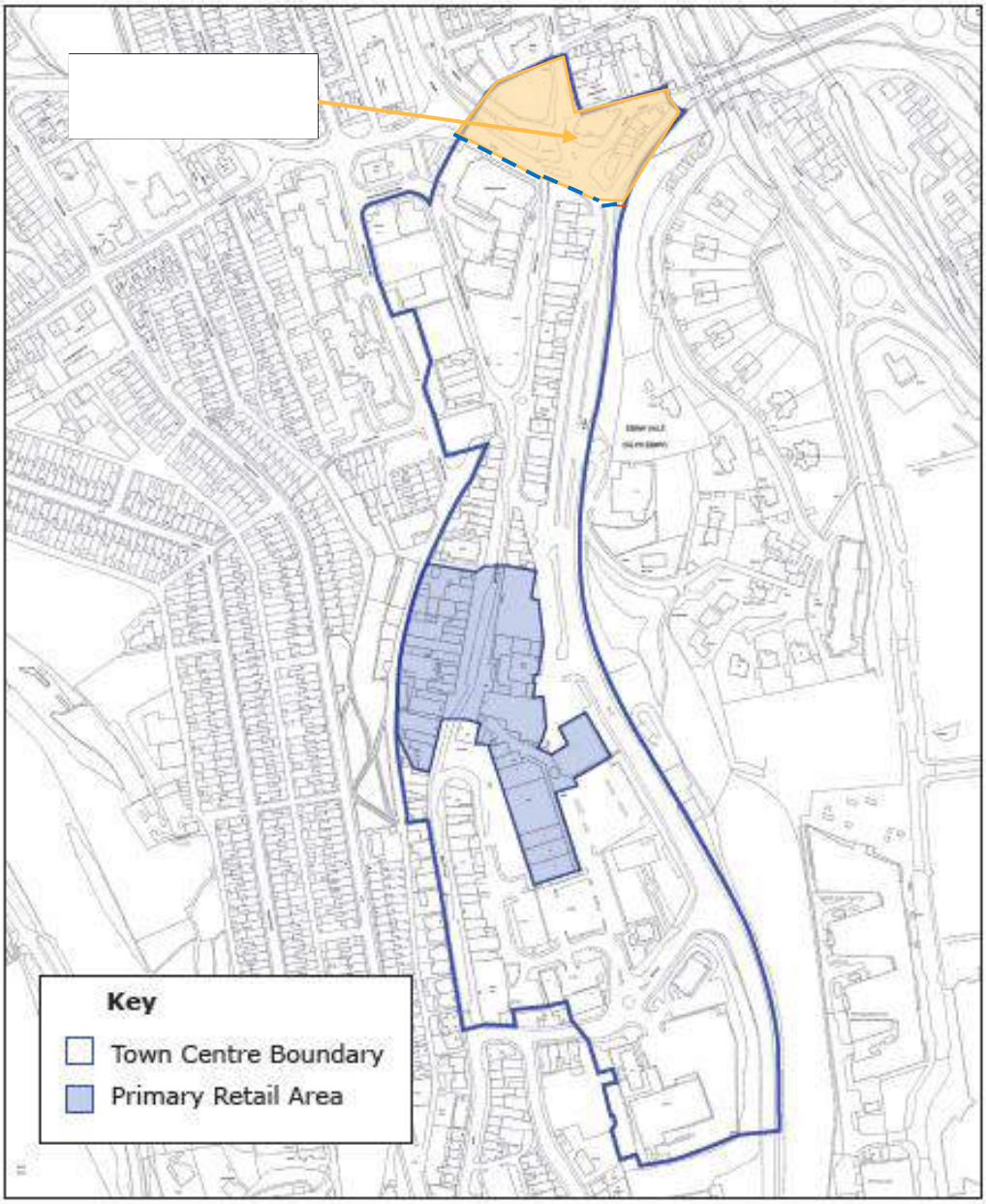
8.20. Our only suggestion would be that the area north of the A4046 does not currently contribute to the health of the town centre and is physically separated from it. We would therefore suggest that this area could be removed from the centre.

8.21. The PRA in Ebbw Vale comprises the modern retail units to the south of the centre and the smaller, older units to the west of Bethcar Street. This is considered to remain appropriate going forward as it contains the larger units most likely to appeal to retailers in the future. The defined area also includes smaller units which are more likely to appeal to independent operators.

8.22. However, the modern units may also be of interest other types of operators that could be an asset to the centre and which may find it difficult to find space elsewhere within it. This is addressed in the review of the policy wording below.

8.23. We therefore recommend that the PRA is retained as currently defined.

Final Draft

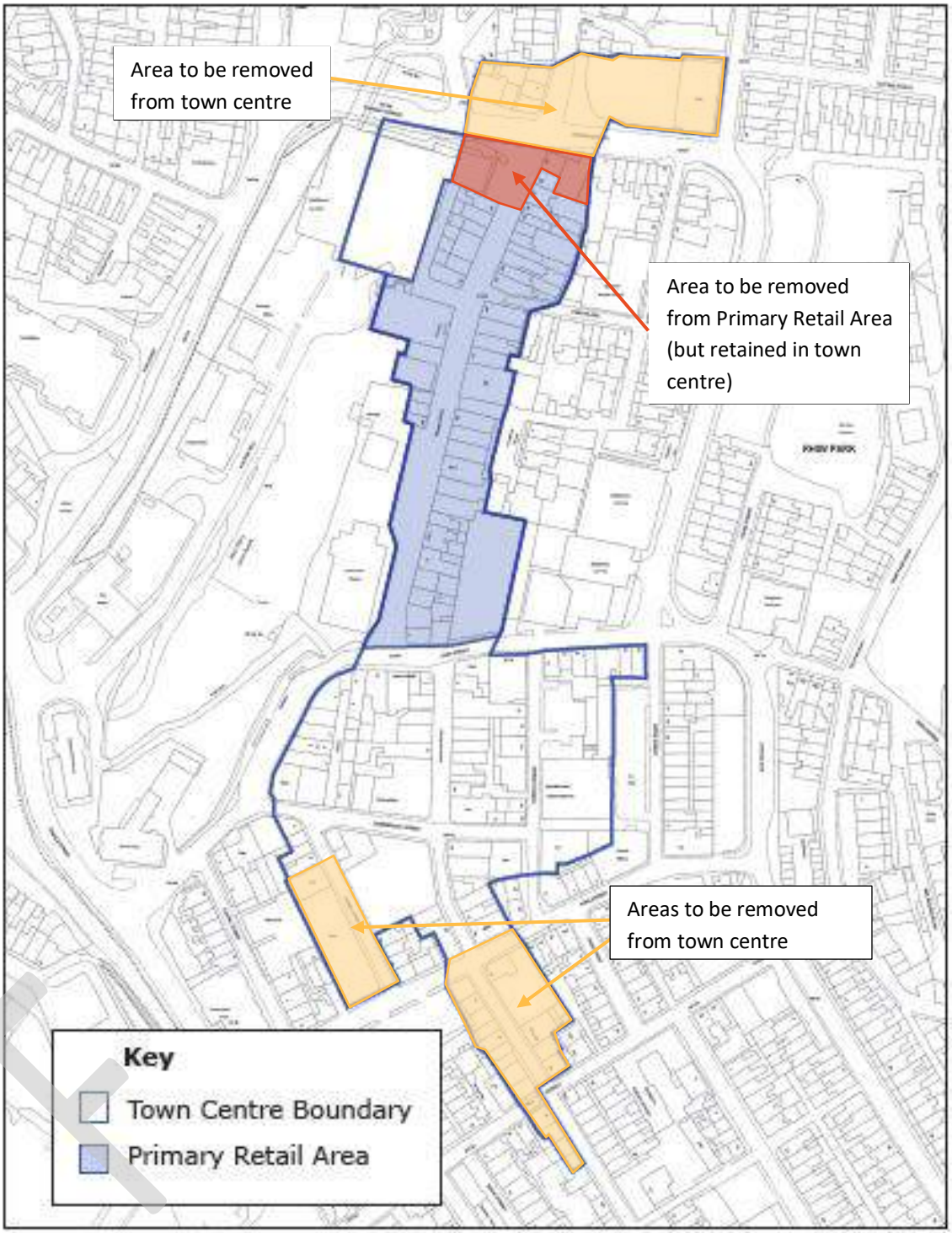


Abertillery

8.24. The level of vacancies and particularly long term vacancies in Abertillery suggests that there is a need to reduce the size of the defined town centre. At present, the proportion of retail and other town centre uses declines south of Commercial Street and particularly south of King Street and removing some of these areas from the town centre is therefore recommended. The continued inclusion of the small number of properties north of Division Street should also be reviewed.

8.25. The PRA in Abertillery comprises the retail area along Church Street between Foundry Bridge / Division Street in the north and High Street in the south. The defined area includes units of different types currently occupied by a mix of national multiples and independents. All the units are relatively small and as such are less likely to be of interest to national multiples in the future.

8.26. The PRA as currently defined remains largely appropriate, but we would suggest that the area at the very north of Church Street is removed, given it does not provide a retail offer.



Brynmawr

8.27. Brynmawr is a unique centre in that its main retail offer is at the nearby Lakeside Retail Park outside of both the currently defined town centre and the PRA. It also means that the town centre has a different role and function than what would otherwise be expected, with the emphasis on mixed town centre uses and independent retail provision.

8.28. The town centre is currently performing relatively well but its long term future is likely to depend both on developing this complementary offer and seeking to increase interaction between the town

centre and Lakeside Retail Park, given the significant footfall the latter attracts. If successful, this would be particularly beneficial for the area around Market Square, with the demand likely to be for complementary town centre uses.

8.29. We have therefore given thought to whether the town centre boundary should be extended to include the retail park and the adjoining NMC Factory and Bus Depot site, where investment in retail development is already underway. In the absence of any quantitative or qualitative need to allocate new sites for retail and town centre development however, we have concluded that such an expansion is not justified.

8.30. Further, it could serve to harm the existing town centre, given that the policy support provided to developments within town centres does not distinguish between areas within it, other than any Primary Retail Area. It would also considerably increase the areas considered to fall within a definition of 'edge of centre'.

8.31. Instead, we consider that it would be preferable for any development proposals or other planning applications at the retail park, to continue to be the subject of policies that seek to support the historic town centre, with this area benefitting from the 'town centre first' approach to development. Smaller scale developments / uses that could be accommodated within the existing town centre would continue to be encouraged to consider such locations first, with the retail park considered one of the next sequentially preferable locations.

8.32. We have also considered whether it would be appropriate to extend the town centre northwards to include the recent King Street development comprising One Stop and adjoining unit (proposed for restaurant use). This would seem to be appropriate given the development provides an important convenience anchor at the north of Beaufort Street and strengthens the retail and leisure offer in this area, which is already anchored by the Lloyds Bank unit.

8.33. However, there is no quantitative or qualitative need to expand the centre and we have therefore reviewed the rest of the town centre boundary to see if all areas would be expected to contribute to the centre in the future. Our conclusion is that the long term emphasis should be on strengthening the town centre southwards towards the retail park. There is therefore potential to encourage other land uses at the northern end of Market Square, by removing a small number of properties from the town centre boundary. A small number of units on the west side of King Street could also be removed.

8.34. We have also reviewed the current role and future potential of the Station Road Area, which, whilst within the town centre boundary and close to the bus station, provides a different mix of uses to the rest of the town centre. We do not see this changing in the foreseeable future, with the retail emphasis likely to continue to be towards the retail park. However, this area provides a different type and size of property to the rest of the centre and we consider it has the potential to accommodate other town centre uses where larger format / footprints are required or a mix of uses is appropriate. Further, such development on this site would offer greater benefit and potential linkage to the rest of the town centre, than sites closer to the retail park.

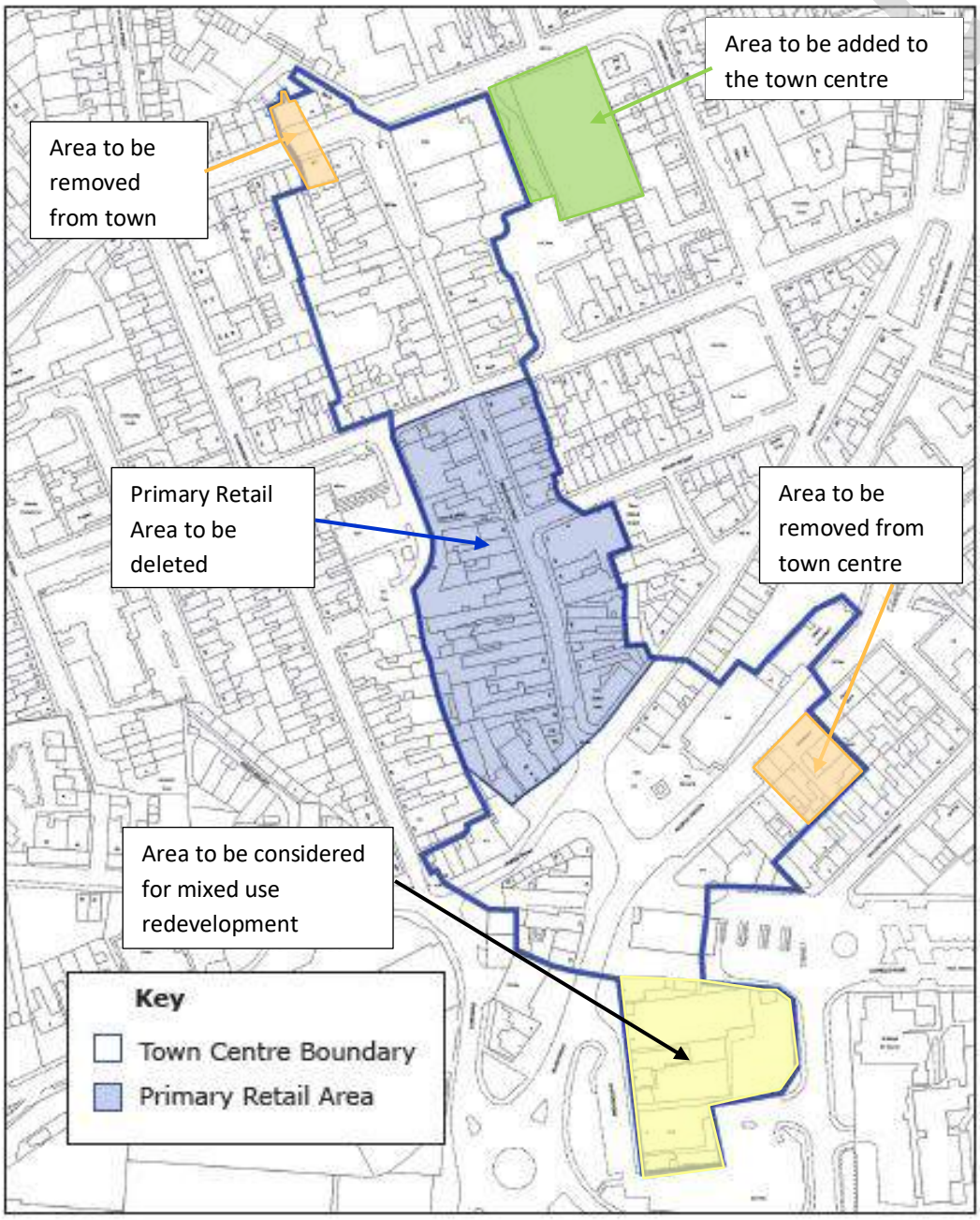
8.35. We therefore recommend that this area is retained within the town centre, but the possibility of allocating it for mixed use redevelopment complementary to the rest of the town centre and the retail park should be explored.

Final Draft

8.36. Turning now to the PRA in Brynmawr this currently comprises the retail units at southern end of Beaufort Street. This area includes some of the larger retail units in the historic centre and previously, a number of national multiples. However, future interest from the national multiples is more likely to centre on the retail park and this part of Beaufort Street no longer provides a different retail offer to the rest of the centre.

8.37. It is also remains the case that the main retail offer in the town is outside of the town centre at Lakeside Retail Park. We therefore question the benefits of defining a PRA for the centre, when the success of the historic centre is likely to depend on it strengthening its complementary town centre offer rather than its retail function.

8.38. We would therefore suggest that there is no policy requirement to define a PRA for Brynmawr and the current designation should be deleted.



Tredegar

8.39. Tredegar is a relatively large centre and the current distribution of retail and other uses within it presents challenges for its future development. Overall, we consider the centre would benefit from a degree of consolidation, but the northern and southern parts of the centre are both important to its overall health and attractiveness and as such should be retained within the town centre boundary. As a result, we conclude that there is no current requirement to amend the boundary.

8.40. There is however a need to consider how the two parts of the centre (Commercial Street and Castle Street) can be better integrated and developed in ways that complement and strengthen the centre as a whole.

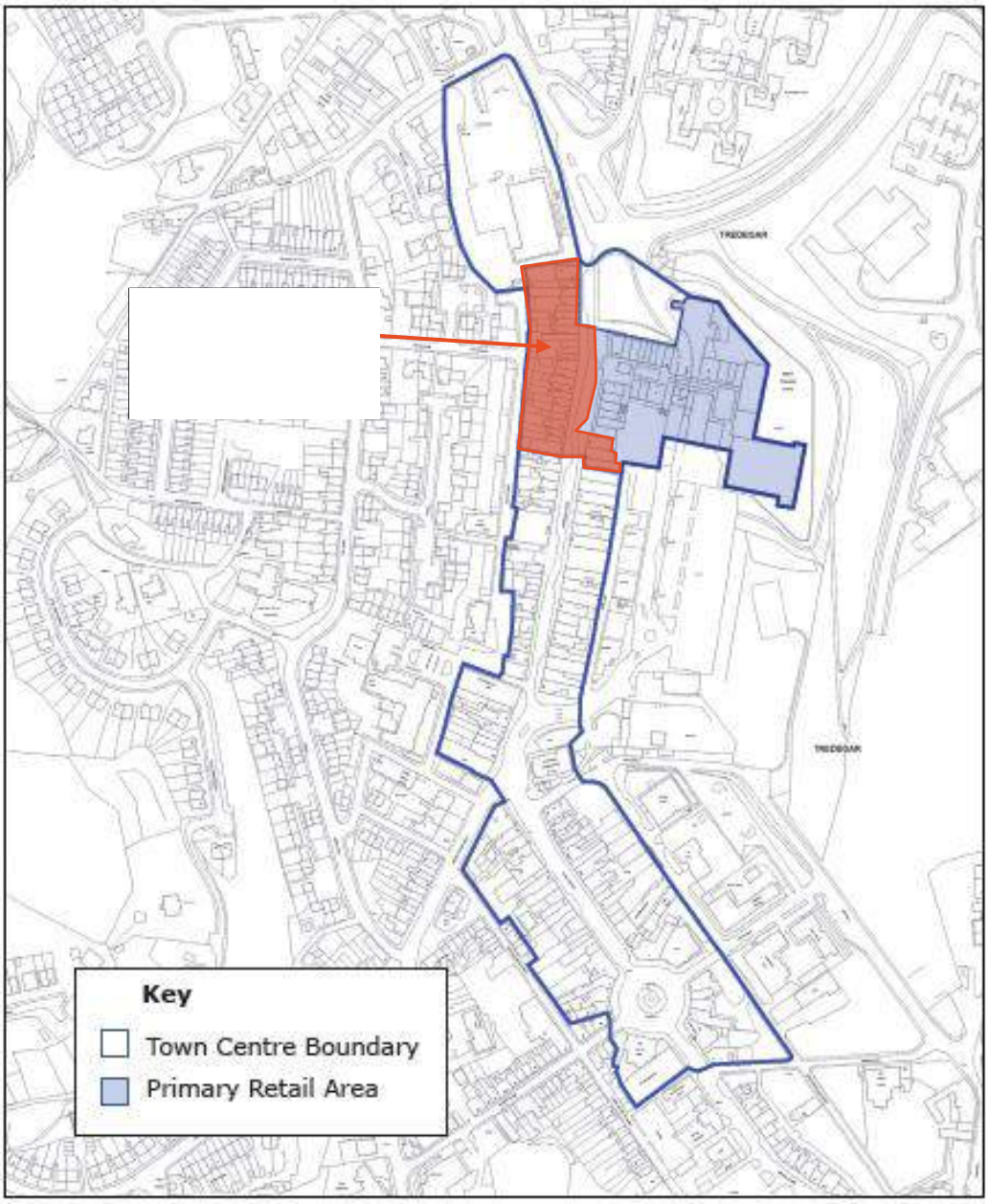
8.41. The PRA in Tredegar comprises the modern retail units to the north of the centre within the Gwent Shopping Centre and the smaller, older units on the opposite side of Commercial Street, extending towards, but not including the Lidl unit.

8.42. The Gwent Shopping Centre includes units of a range of sizes that could appeal to national multiples and independents. However, the modern units are also likely to interest other types of operators (such as the gym that already operates from one of the units), that could be an asset to the centre.

8.43. In contrast, although the proportion of retail uses may be higher within the PRA to the west of Commercial Street, there is little in terms of the unit sizes or other factors that distinguish this area from other areas within the town centre.

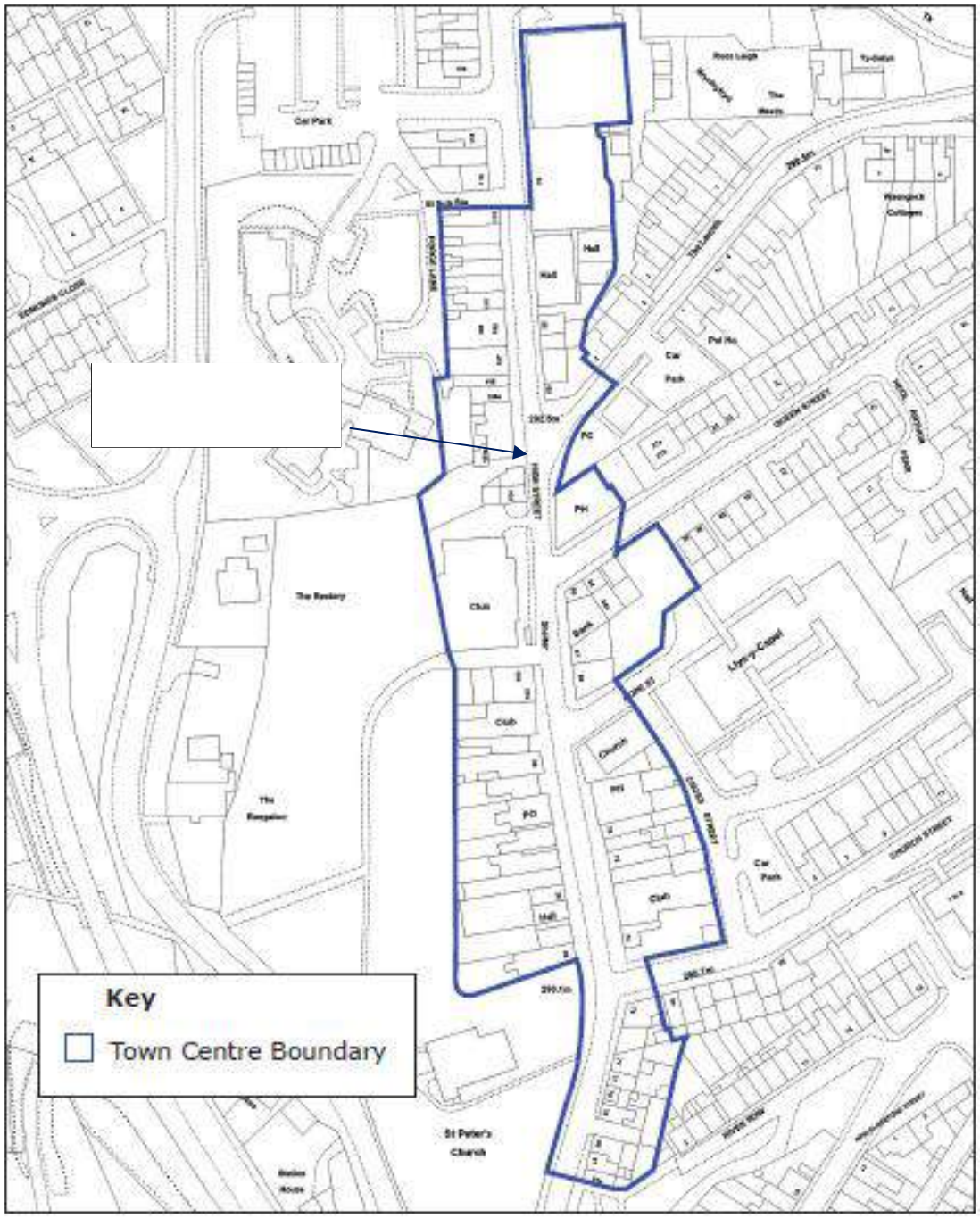
8.44. We therefore recommend that the PRA is reduced in extent to cover the Gwent Shopping Centre and adjoining areas as illustrated below.

Final Draft



Blaina

8.45. At the present time, Blaina does not have a strong retail / commercial core and retail and other town centre uses are dispersed throughout its length, with residential development in between. Thus, whilst there is clearly a need to reduce vacancies, this is unlikely to be assisted by changes to the town centre boundary, as existing businesses would not be expected to relocate and new investment in retail development looks unlikely. Instead, we would suggest that a town centre boundary is no longer appropriate and an alternative policy approach is proposed (see below).


Key
Town Centre Boundary

Policy Review

8.46. Having established the retail hierarchy, town centre and Primary Retail Area boundaries which we consider should apply in the future, we have reviewed the current retail and town centre policies and set out below how we consider they should be updated to reflect the current and future needs of the centres.

Policy SP1 Northern Strategy Area – Sustainable Growth and Regeneration

8.47. Many of the principles set out in this policy remain valid (subject to any separate strategic review) and reflect the existing scale of the town centre offer within the Northern Strategy Area. Whilst there is no quantitative or qualitative need to allocate sites for retail development, it remains appropriate that any major expansion in the future should be focused on Ebbw Vale as the highest order retail / commercial centre in the County Borough.

8.48. The support for diversification of the economic base through mixed use development in the district hubs of Tredegar and Brynmawr where this supports and reinforces the roles of the town centres also continues to be an appropriate approach, given the important and sustainable role town centres have in providing for the needs of their local communities.

8.49. However, we would recommend that part (d) of the policy is updated as, whilst the expansion of the roles of town centres may be desirable, we consider that the focus for the district and local town centres should be on serving their local communities. Vibrant town centres that are popular with local residents are considerably more likely to attract tourists than tourism is to make a town centre vital and viable. However, such ambitions can be assisted by ensuring that a sequential approach to development is encouraged for all town centre uses, not just retail, as this improves the overall mix, offer and draw of a centre.

SP1 Northern Strategy Area – Sustainable Growth and Regeneration

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

a) Supporting the creation of a network of sustainable hubs around the principal hub of Ebbw Vale.
b) Promoting Ebbw Vale as the principal hub for Blaenau Gwent, where the majority of social and economic growth will be accommodated including major retail expansion, administrative and cultural developments.
c) Delivering strategic sustainable regeneration flagship schemes at 'The Works' and 'Ebbw Vale Northern Corridor'.
d) Supporting ~~new~~ **and developing the** roles ~~for~~ **of Ebbw Vale and the** district ~~and local~~ town centres **to meet the culture, leisure and tourism needs of their local communities and visitors**.
   - ~~Tredegar District Town Centre will expand its tourism offer through maximising the benefits of local heritage;~~
   - ~~Brynmawr District Town Centre will explore opportunities to develop complementary roles around tourism; and~~
   - ~~Blaina Local Town Centre will build on and exploit its local heritage.~~

Final Draft

e) Enabling diversification of the economic base through mixed-use development in the district hubs of Tredegar and Brynmawr where it supports and reinforces the roles of the town centres.
f) Supporting a major destination attraction that would draw large numbers of people to the area and provide a significant number of jobs.

Policy SP2 Southern Strategy Area - Regeneration

8.50. The recognition that Abertillery town centre will have an important role in the regeneration of the Southern Strategy Area will continue to be an important policy consideration, as successful town centres are important for economic and social purposes.

8.51. However, consistent with the comments made regarding Policy SP1, we would suggest the emphasis for future policy should be on developing Abertillery town centre to meet the needs of the local population, rather than focusing on developing complementary roles around culture, leisure and tourism.

8.52. The household survey has shown that all the major centres in Blaenau Gwent have their own catchment area, and their future success will depend on meeting the needs of the residents within these areas. There will inevitably be a degree of overlap and trade leakage to higher order centres, as these provide more choice and range of goods and services. Improving public transport connections between Abertillery and Ebbw Vale may also result in the latter attracting some of the leakage from the Abertillery area. However, the effectiveness of such an approach will depend on the provision in Ebbw Vale relative to other nearby centres and the ease of access to the alternative offer from Abertillery.

8.53. For Abertillery, local geography and retail provision will always make Cwmbran an attractive choice for higher order shopping and service trips and, whilst the closure of the FSOC may provide some benefits for Ebbw Vale, reliance should not be placed on securing trade from the Abertillery area.

SP2 Southern Strategy Area – Regeneration

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

a) Ensuring that the district hub of Abertillery is well connected with its hub area, Ebbw Vale and the wider region through safe, frequent and reliable public transport links;
b) Supporting Abertillery District Town Centre in developing **its role as a centre to meet the** ~~complementary roles around~~ culture, leisure and tourism **needs of its local community and visitors**;
c) Delivering 'Activity Tourism' opportunities in the area;
d) Ensuring the removal of dereliction by promoting the reuse of under used and derelict land and buildings;
e) Delivering regeneration schemes which provide residential development and infrastructure; and
f) Building on the unique identity of the area by protecting and enhancing the built heritage and the natural environment.

Policy SP3 The Retail Hierarchy and Vitality and Viability of the Town Centre

8.54. The proposed changes outlined above, necessitate a number of changes to this policy.

Final Draft

8.55. The principle of protecting existing retail provision in such centres remains important and we believe should extend to other uses that benefit the local community, rather than be restricted to retail and local shops.

8.56. Part 2 of Policy SP3 seeks to improve the vitality and viability of town centres by (a) encouraging the refurbishment and redevelopment of existing shops, offices and other commercial premises; (b) implementing opportunities to improve the retail offer; (c) improving vehicular access and circulation, public transport and car parking provision where necessary and (d) improving disabled access and facilities.

8.57. There has been no change in the need to improve town centre vitality and viability and as such the policy basis for this part of Policy SP3 remains. However, we would suggest that (b) should be updated to reflect the importance of other town centre and community uses in addition to retail.

8.58. Section 3 of Policy SP3 sets out the retail floorspace requirements during the plan period to 2021. This element of the policy is no longer required as there is no requirement to allocate any sites for retail development during the plan period.

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

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

Principal Town Centre

a) Ebbw Vale will perform a sub-regional retail role.

District Town Centres

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

~~Local Town Centre~~

~~c) Blaina will act as a local shopping centre that will be protected and enhanced to provide facilities for the local community.~~

Neighbourhood Centres

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

2) In order to improve the vitality and viability of the town centres:

a) Shops, offices and other commercial premises, where appropriate, will be upgraded by means of refurbishment and redevelopment;

b) Opportunities to improve the retail, **service and leisure** offer will be implemented;

c) The provision of better vehicular access and circulation arrangements, improved public transport facilities and provision of additional car parking spaces will be provided where necessary; and

d) Disabled access and facilities will be improved.

Final Draft

3) ~~In order to address local retailing needs, provision for 10,200 sq m of comparison and 2,445 sq m of convenience floorspace is required over the plan period.~~

DM5 Principal and District Town Centre Management

8.59. This policy seeks to both define Primary Retail Areas (PRAs) and sets out the polices which will apply. Specifically, it (a) proposes Primary Retail Areas where only A1 uses will be permitted; (b) encourages A2, D1 and D2 uses outside of the Primary Retail Area; (c) indicates A3 uses will not be permitted where they harm the vitality and viability and retail mix of the areas as a result of proliferation and (d) does not permit the change of use of ground floor units in the town centre to residential use.

8.60. The policy also seeks to improve the vitality and viability of the town centres through the refurbishment / redevelopment of existing properties and other opportunities, the provision of better accessibility and circulation arrangements and improved disabled access.

8.61. This policy currently applies to Ebbw Vale, Abertillery, Brynmawr and Tredegar all of which have defined PRAs.

8.62. However, things have changed significantly since this policy was formulated. The demand for retail space both in and out of centre has declined and there is no indication that this will change during the next plan period. This is the result of various structural changes in the retail sector and shopping behaviour and thus a policy that rigidly seeks to retain A1 uses in any location, risks increasing vacancies and stifling innovative and creative new main town centre uses that support the vitality of the centres.

8.63. We therefore consider that this policy needs to be revised, in conjunction with the changes to the boundaries already proposed above.

8.64. As referred to above, it remains the case that retail is an essential component of any town centre and as such a policy that seeks to protect core areas for this use remain appropriate. However, it is also important that such areas are not disadvantaged if the demand for retail space is limited, as such an approach risks increasing vacancies and indirectly encouraging potential occupiers to locate elsewhere where restrictions do not apply or are less rigorous.

8.65. In our opinion a town centre's vitality and viability can be supported by a range of different uses and their relative importance varies between locations and over time. Indeed, some appropriate town centre uses may not even have been identified at the present time and may emerge as technology or other markets evolve.

8.66. It is therefore important that the policy response is flexible enough to adapt to changing circumstances, whilst providing appropriate policy guidance.

8.67. With respect to PRAs, it is our view that a policy that seeks to restrict such areas to retail uses only is no longer appropriate and going forward policies need to balance the preference for retail alongside encouraging other appropriate uses. In this respect, the relevance is less that of the end use but its contribution to town centre vitality and viability, particularly during daytime trading hours.

8.68. We would suggest Policy DM5 could be updated as follows:

Final Draft

DM5 Principal and District Town Centre Management

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

a) Primary Retail Areas are identified within which **the Council will seek to retain and enhance** ~~only~~ A1 uses ~~will be permitted~~ **whilst seeking a reduction in the number of vacant ground floor commercial uses. Proposals for the change of use, or redevelopment of premises away from retail (Use Class A1) will only be supported where it can be demonstrated that:**

   i. The proposal will contribute to the centre's vitality and viability during daytime trading hours; and

   ii. Proportionate evidence has been provided to demonstrate that the premises are no longer required for retail purposes.

b) Outside of Primary Retail Areas but within the Town Centre boundaries:

   i. A2, **B1, C1**, D1 and D2 uses will be encouraged; ~~outside the Primary Retail Area.~~

   ii. Food and drink uses (Use Class A3) that operate principally during normal daytime trading hours will be encouraged;

   iii. Other A3 uses **that principally operate outside daytime trading hours** will not be permitted where they harm the vitality, ~~and~~ viability ~~and retail~~ **or** mix of **uses in** the area as a result of a proliferation of this type of use; **and**

   iv. The change of use of the ground floor units to residential use will be permitted where the use is appropriate and in accordance with other policies within this plan and National Planning Policy. The introduction of residential uses will not be permitted where it will fragment the retail and commercial frontages or impact on the vibrancy and viability of the centre.

~~c) Within the town centres, the change of use of the ground floor units to residential use will not be permitted.~~

DM6 Management of Blaina Local Town Centre

8.69. On the basis of our advice above, there is no requirement to distinguish between Blaina and the neighbourhood centres in retail policy terms. It is therefore necessary to consider whether planning policy guidance continues to be required for Blaina, and if so, whether the same policies should be extended to cover the neighbourhood centres. This could require the neighbourhood centres to also be defined in the LDP.

8.70. On balance, we consider that the definition of a centre boundary is of less relevance in Blaina and other smaller centres, given the greater mix of uses and more dispersed nature of the retail offer. We would therefore suggest that a new policy relating to retail and commercial uses in such centres be included instead of the existing policy DM6, which would cover a wider range of centres and circumstances.

DM6 Management of ~~Blaina Local Town Centre and~~ Neighbourhood Centres

Development proposals incorporating a change of use of ground floor premises in ~~Blaina Local Town Centre~~ **the Neighbourhood Centres (including Blaina),** will be subject to the following management:

a) Retail, professional and financial services, entertainment and leisure and community uses will be supported.

Final Draft

b) A3 uses will not be permitted where they harm the vitality, and viability and retail mix of the area as a result of a proliferation of this type of use.

c) ~~In the case of a~~ Change of use to residential **use**, **will be permitted where the use is appropriate and in accordance with other policies within this plan and National Planning Policy and where it will not impact on the vibrancy and viability of the centre** ~~the retention of the retail site for retail/commercial purposes has been fully explored without success by way of marketing for appropriate retail/commercial purposes at reasonable market rates for a minimum of 12 months~~.

MU1 Ebbw Vale Northern Corridor

8.71. As a strategic mixed-use allocation, a review of the Ebbw Vale Northern Corridor Framework is outside the scope of this study. However, the inclusion of a commercial leisure hub, and other leisure-related uses would remain appropriate provided such uses could not be accommodated within Ebbw Vale town centre. Development in the Northern Corridor should complement, rather than compete with the existing retail and commercial centres.

8.72. A quantitative need for specific provision has not been identified in this study, but we would suggest that any commercially viable site in this location is likely to draw on a wider catchment area than the existing town centres, and, depending on the nature of the offer, could draw from outside of the County Borough.

8.73. We would also suggest that any proposals for food and drink provision should be intrinsically linked to the rest of the leisure offer and not provided as separate / standalone units which otherwise may be capable of development within Ebbw Vale or Tredegar town centres.

MU3 NMC Factory and Bus Depot

8.74. This site continues to provide an important link between Lakeside Retail Park and Brynmawr Town Centre and the implementation of the approved retail development is to be welcomed.

8.75. Until this permission has been implemented and the development is complete, it would be advisable to retain the site allocation in the LDP. However, for the reasons provided above, we would suggest it should remain as an edge-of-centre, rather than an in-centre site, to ensure its use remains complementary to the town centre.

AA1 Action Areas

8.76. There is no longer any quantitative need for additional convenience or comparison provision in Ebbw Vale or the County Borough during the period to 2033, but the Southern Gateway and Market Square sites remain potential development opportunities that could benefit the town centre.

8.77. The Southern Gateway site is within the defined town centre and as such would remain a sequentially preferable site for retail or other town centre uses. We therefore do not consider that any specific retail policies are required for the site.

8.78. The Market Square site is partially within the defined town centre and partly outside (edge-of-centre), although we have suggested that the town centre boundary should be adjusted in this area to remove it from that designation.

8.79. The redevelopment of the area as an important link between the existing centre and the Northern Corridor development would not be affected by these changes, and it would remain sequentially

Final Draft

preferable to any out-of-centre sites for retail and other town centre uses. However, with no quantitative need for additional retail provision, it is considered that the current allocation should be removed.

R1 Retail Allocations

8.80. Of the 6 sites allocated for retail development in the current LDP, none have come forward for development to date. There is therefore no requirement to retain the allocations in the replacement plan. Specifically:

- R1.1 Rhyd y Blew Retail Park, Ebbw Vale – this site has planning permission for 6,000 sqm net of non-food retail floorspace and, it is our understanding that the development has been partially implemented and thus, this is an extant permission. This means it could come forward for development at any time. However, it is not necessary to retain it as an allocation and instead it should be treated as any other out-of-centre retail site should new proposals come forward;
- R1.2 Extension to Festival Shopping Outlet Centre, Ebbw Vale – this permission has expired;
- R1.3 Tesco Extension, Ebbw Vale – this permission has expired;
- AA1.1 Southern Gateway, Ebbw Vale – discussed above. This allocation is no longer required but the site is within the town centre and thus should be considered as a potential sequential site should retail or the development of other town centre uses be promoted;
- AA1.2 Market Square, Ebbw Vale – discussed above. This allocation is no longer required but the site is partly in and partly on the edge of the town centre and thus should be considered as a potential sequential site should retail or the development of other town centre uses be promoted;
- R1.4 Market Square, Ebbw Vale – This allocation is no longer required but the site is within the town centre and thus should be considered as a potential sequential site should retail or the development of other town centre uses be promoted.

TM1 Tourism and Leisure

8.81. Policy TM1 allocates 7 sites for tourism related activities, some of which include the provision of leisure uses. We have therefore reviewed the allocated sites and would comment as follows:

- TM1.1 Eastern Valley Slopes – This allocation relates to outdoor recreation and leisure uses and as such is outside the scope of this study;
- TM1.2 Garden Festival – The closure of the Festival Park Outlet Centre is likely to mean that a wider review of the site's future is required. As such the relevance of continuing to promote the site as a major tourist destination is outside the scope of this study, although it seems unlikely that uses that could be promoted here would otherwise consider locating in any of the Blaenau Gwent town centres;
- TM1.3 Blue Lakes - This allocation relates to outdoor recreation and leisure uses and as such is outside the scope of this study;

Final Draft

- TM1.4 Bedwellty House and Park – This allocation relates to a network of historic buildings and landscapes and as such provide a different tourist offer to anything that could be provided in the town centres;
- TM1.5 Parc Bryn Bach (including a hotel) – This allocation relates to a countryside and recreational attraction and as such is outside the scope of this study;
- TM1.6 Nantyglo Roundhouse Towers – This allocation relates to a heritage asset and is outside the scope of this study; and
- TM1.7 Cwmtillery Lakes - This allocation relates to outdoor recreation and leisure uses and as such is outside the scope of this study.

Final Draft

9. Study Summary and Conclusions

9.1. This report has been prepared jointly by Reeves Retail Planning Consultancy (RRPC) and Williams Gallagher (WG) on the instructions of the Blaenau Gwent County Borough Council (BGCBC). Its purpose is to provide an updated evidence base on retail and town centre uses (including leisure) to inform the Replacement Local Development Plan (RLDP) which the Council are in the process of preparing, in accordance with the requirements set out by national government in Planning Policy Wales.

9.2. The RLDP will set out a clear strategy for the development of retail and other town centre uses in Blaenau Gwent during the plan period to 2033, supporting the Welsh Government's objective of achieving vibrant, attractive and viable retail and commercial centres.

9.3. To inform this strategy, this study provides a detailed study of the main centres in the County Borough and considers the changing retail and economic pressures they are experiencing. It then provides advice on:

- The retail hierarchy;
- The quantitative and qualitative need for additional retail provision in the County Borough;
- The health of the centres and their strengths and weaknesses and opportunities and threats;
- Commercial leisure provision in Blaenau Gwent, including patterns of usage of leisure facilities, together with an assessment of future need; and
- Changes to current planning policies to reflect the findings of the study, including the extent of town centres and Primary Retail Areas.

9.4. It is important to recognise that, whilst town centres and high streets have always been dynamic, adapting and evolving to meet the emerging needs of their customer base, the significant and fast-moving structural changes seen since the economic recession have resulted in a significant decline in the demand for retail floorspace.

9.5. This has resulted in an increase in town centre vacancies and under-utilised retail space, and the majority of town centres are now over-spaced in terms of their retail provision and many to a significant extent. There is also on-going competition from existing out of centre locations which have also experienced vacancies and so are also competing to attract the limited number of new businesses seeking retail floorspace or space for other town centre uses.

9.6. This has not been changed by the Covid-19 pandemic, although it has accelerated some pre-existing trends, such as the amount of expenditure spent online. However, it also appears to have increased the importance of 'local' shopping. Improved use of local shopping facilities for both convenience and regularly purchased comparison items and increased use of online shopping replacing trips to higher order centres or out-of-centre shops therefore looks a realistic possibility and is likely to benefit the Blaenau Gwent centres.

9.7. However, it remains the case that the centres still need to adapt if they are to survive and thrive, and reliance on retail uses needs to be decreased. The challenge will be to develop appropriate strategies to achieve this within the context of the existing centres, which are often relatively large for the catchment they serve.

Final Draft

Current Shopping Provision and Patterns

9.8. The starting point for any retail and town centre study is an understanding of current retail provision and shopping patterns. The latter has been informed by the household survey undertaken in 2020. This indicates that the convenience shopping needs of Blaenau Gwent residents are generally being met by stores within the County Borough.

9.9. The most popular five stores for main convenience shopping comprise the Tesco stores at Ebbw Vale and Abertillery, Asda at Brynmawr, Aldi in Ebbw Vale and Morrisons also in Ebbw Vale. Together these stores are used by over three-quarters of all respondents.

9.10. Considerably less comparison expenditure is retained in the area, with the internet and Cyfarthfa Retail Park in Merthyr Tydfil being the most popular destinations for a wide range of comparison purchases. There is also leakage to Cwmbran and Merthyr town centres and Cardiff (City Centre and out of centre locations).

9.11. Within the County Borough, Ebbw Vale town centre is the main beneficiary of local spend, followed by Lakeside Retail Park in Brynmawr and Festival Park Outlet Shopping Centre.

9.12. In terms of the use of the Blaenau Gwent centres:

- **Abertillery** is a popular shopping destination for local residents and those in the Blaina area but the majority of those using it consider the range and quality of shops and the overall attractiveness and experience of the centre to be poor or very poor;
- **Blaina** is well used by local residents for shopping but attracts limited trade from further afield. There are high levels of dissatisfaction with the offer provided;
- **Brynmawr** is the second most frequently visited location in Blaenau Gwent with the shopping (food and non-food) at the Lakeside Retail Park being the main draw. The town centre is relatively well rated by visitors, but the range and quality of places to eat and drink is considered to be poor by nearly half;
- **Ebbw Vale** is the most frequently visited of the Blaenau Gwent Centres with over half of all respondents visiting at least once a month. Shopping (food and non-food) is the main draw, but the financial / business offer is important for local residents. Views on the centre are mixed, but the ease of moving around the centre is a particular positive; and
- **Tredegar** is well used by its local catchment population particularly for shopping. Its bars and pubs are also an important draw. Despite this, overall satisfaction levels with the town centre offer are low, although the ease of moving around the centre is highly rated followed by the availability of car parking.

Health of the Centres

9.13. The health of the Blaenau Gwent centres appears to have been relatively robust during the period since 2012 and they have seen more limited changes than might have been expected based on national trends.

9.14. However, new investment in the centres has been lower than anticipated and allocated and committed sites have not come forward for development as anticipated.

Final Draft

9.15. The experiences of 2020 have led to an increased interest /reliance on shopping more locally as well as more online shopping. There has also been a move away from some of the larger town and city centres given the increased working from home and unwillingness to use public transport.

9.16. It is not currently clear which of these trends will continue in the long term, but the indications are that centres serving more local catchments may benefit from the recent changes and certainly recent events offer a new impetus to change shopping behaviour more permanently. If so, then the town centres in the Welsh Valleys including in Blaenau Gwent could see a major improvement in their use – provided existing businesses remain trading and can reopen once restrictions ease.

9.17. However, any improvement in the use of the centres is unlikely to increase the demand for further additional retail floorspace.

9.18. In terms of the individual centres:

- **Abertillery** is a generally healthy and attractive centre but appears to be oversized for its current role, as evidenced by the number of long-term vacancies. It benefits from a good range of uses and is also likely to benefit from the draw of the edge-of-centre Tesco. However, the southern part of the town centre lacks a clear role or focus of offer and the environmental quality of the area is poorer, making it less attractive. There is a need to reduce the size of the centre and consolidate its offer;
- **Blaina** is a weak centre in its current form as it contains a large number of vacant units, a considerable proportion of which have been vacant long-term. Several the properties are also in poor condition. The nature of the centre also means that those shops and businesses which are trading well and serving the local community are dispersed throughout the centre, reducing their impact and ability to support each other;
- **Brynmawr** is a generally healthy centre, despite the lack of national multiples, and benefits from an attractive Market Place area, where the Market Hall cinema is also located. Lakeside Retail Park is a major draw to Brynmawr and the challenge is to attract some of these customers into the town centre;
- **Ebbw Vale** Ebbw Vale is a generally healthy town centre with a good convenience and comparison offer and below average vacancies. The centre has a higher proportion of national multiples than the other centres in Blaenau Gwent but is unable to provide the same offer as either Cwmbran town centre or Cyfarthfa Retail Park in Merthyr Tydfil. Further losses within The Walk have the potential to reduce the draw through this area weakening the potential for linked shopping trips from Aldi, a key draw to the centre; and
- **Tredegar** is a relatively large centre and is generally healthy with average levels of vacancy in terms of floorspace. However, the location and long-term nature of the vacancies, particularly within the Gwent Shopping Centre are a concern and are likely to be weakening the vitality and viability the Primary Retail Area. In contrast, there is recent and on-going investment in the southern part of the centre, around The Circle, which appears to be well placed to meet the identified shortfall in leisure services including in the restaurant sector. The challenge will be to integrate the two parts of the centre and potentially reduce the amount of retail floorspace provided whilst maintaining the linkages and flows within the centre.

Final Draft

Retail Capacity and Need

9.19. The assessment of quantitative retail need /capacity for the plan period to 2033 has demonstrated that there is no requirement for additional convenience and comparison retail floorspace in Blaenau Gwent during the plan period, although we would caution that this conclusion will need to be kept under review as events and the reliance on assumptions, mean that any projections beyond 5 years must be treated with a degree of caution, especially considering the economic turmoil the sector is currently experiencing due to the pandemic.

9.20. At present however, there is already more than sufficient convenience and comparison floorspace within Blaenau Gwent to meet the identified needs, even before allowance is made for committed developments. A small convenience capacity at 2020 is more than offset by the anticipated improvement in the performance of existing outlets and SFT sales in subsequent years, resulting in a theoretical need to reduce convenience floorspace by 883 sqm net by 2035 and comparison by 1,221 sqm.

9.21. This represents a significant change since the LDP was adopted in 2012 but is consistent with a review of existing store performance. It is also consistent with the levels of vacancies seen and the lack of interest in taking up many of the committed and planned retail development proposals identified in the current LDP.

Commercial Leisure Requirements

9.22. Leisure uses have always been an important element of a town centre offer but their relative significance has increased in recent years, as spend on eating out and other leisure activities has increased, whilst spending at shops in town centres has faced the various challenges detailed above.

9.23. The existing leisure offer in the Blaenau Gwent's town centres is mainly related to the food and drink (Use Class A3) and service sectors (Use Class A1), with the former occupying a relatively large proportion of units and floorspace. Despite this, the Blaenau Gwent centres provision is generally below the UK average. Only Abertillery is (marginally) above the average, whilst provision in Ebbw Vale is particularly low.

9.24. The difference in offer is even more pronounced when the type of food and drink provision is considered. Blaenau Gwent centres have very high levels of fast food & takeaway provision, in most cases more than double the UK average in terms of the number of units. There is also a higher provision of cafes but very low restaurant provision.

9.25. With leisure spend overall expected to increase by between 0.9% and 2.9% per annum from 2023 onwards, and by considerably more than that in 2021 and 2022 after the sharp decline in 2020, it is clear that the role of leisure and retail services within town centres will continue to be important during the plan period. Further, given that the majority of services and leisure activities require a physical presence at the business location, the uses can contribute to the vitality of a town centre.

9.26. There would also appear to be a qualitative need to improve the mix of A3 uses within the Blaenau Gwent centres to better reflect the expenditure available to spend on eating out in cafes / restaurants compared with fast food & takeaways. The former uses also support the vitality of town centres to a greater extent than fast food and takeaway uses as they are both more likely to be open at the same time as the retail uses and have greater potential to increase the dwell-time of visitors.

Final Draft

Retail Policy Recommendations

9.27. Based on our review of national trends, the current health of the centres and quantitative and qualitative need for both retail and leisure uses, we consider that the current policies within the LDP require a degree of updating to reflect the current position and future challenges facing the centres.

9.28. In summary:

- **Retail Hierarchy** – the existing retail hierarchy as set out in Policy SP3 remains appropriate for the Principal and District Town Centres, but there is no requirement to distinguish Blain local town centre from the neighbourhood centres in policy terms;
- **Town Centre Boundaries** – minor changes to the town centre boundaries for Abertillery, Brynmawr and Ebbw Vale are proposed. The town centre boundary for Blaina should be deleted;
- **Primary Retail Areas** – minor changes to the PRAs for Abertillery and Tredegar are proposed. It is also recommended that the PRA for Brynmawr be deleted;
- **Policy Changes**:
    - Policy SP1 Northern Strategy Area – changes are proposed to part (d) of the policy to reflect that the focus for the district town centres should be on serving their local community. The reference to Blaina should be removed, with policies for this centre covered by a revised Policy SP3;
    - Policy SP2 Southern Strategy Area - consistent with the comments made regarding Policy SP1, the emphasis for future policy should be on developing Abertillery town centre to meet the needs of the local population, rather than focusing on developing complementary roles around culture, leisure and tourism. The policy wording should be amended accordingly;
    - Policy SP3 The Retail Hierarchy and Vitality and Viability of the Town Centre – whilst the principle of protecting existing retail provision in town centres remains important, this policy needs to be updated to reflect current and expected changes in the demand for and provision of retail floorspace. This includes making reference to the importance of service and leisure uses in the town centre as well as retail. There is no policy requirement to distinguish Blaina from the neighbourhood centres, nor is there any quantitative or qualitative need for additional convenience or comparison provision over the plan period;
    - DM5 Principal and District Town Centre Management – In addition to the changes to town centre boundaries and PRAs indicated above this policy needs to be revised to reflect the declining importance of retail and need to develop a more diverse town centre offer. The policy must also be flexible enough to adapt to changing circumstances, whilst providing appropriate policy guidance. Changes of use away from retail in PRAs should be permitted where the proposal will contribute to the centre's vitality and viability during daytime trading hours, and there is proportionate evidence to show that the premises are no longer required for retail purposes. Outside of Primary Retail Areas but within the Town Centre boundaries, A2, B1, C1, D1 and D2 uses should be encouraged along with food and drink uses (Use Class A3) that operate principally during normal daytime trading hours. Other A3 uses that principally operate outside daytime hours will not be permitted where they harm the vitality, viability or mix of uses in the area as a result of a proliferation of this type of use. The change of use of the ground floor units to residential use will be permitted where the use is appropriate and in accordance with other policies within this plan and National

Final Draft

Planning Policy and where it does not fragment the retail and commercial frontages or impact on the vibrancy and viability of the centre;

- DM6 Management of Blaina Local Town Centre - There is no requirement to distinguish between Blaina and the neighbourhood centres in retail policy terms and therefore this policy can be retitled to refer to the neighbourhood centres only (including Blaina). The policy should also be updated to allow residential development where the use is appropriate and in accordance with other policies within this plan and National Planning Policy and where it will not impact on the vibrancy and viability of the centre and having regard to the 'agent of change' principle;
- MU1 Ebbw Vale Northern Corridor - As a strategic mixed-use allocation, a review of this policy is outside the scope of this study. However, the inclusion of a commercial leisure hub, and other leisure-related uses would remain appropriate provided such uses could not be accommodated within Ebbw Vale town centre. Development in the Northern Corridor should complement, rather than compete with the existing retail and commercial centres;
- MU3 NMC Factory and Bus Depot - This site continues to provide an important link between Lakeside Retail Park and Brynmawr Town Centre and the implementation of the approved retail development is to be welcomed. Until this permission has been implemented and the development is complete, it would be advisable to retain the site allocation in the LDP;
- AA1 Action Areas – As there is no longer any quantitative need for additional convenience or comparison provision in Ebbw Vale or the County Borough during the period to 2033, it is not necessary to retain the previously allocated development sites at The Southern Gateway or The Market Square site;
- R1 Retail Allocations - Of the 6 sites allocated for retail development in the current LDP, none have come forward for development to date. There is therefore no requirement to retain these allocations in the replacement plan;
- TM1 Tourism and Leisure – a consideration of the 7 sites allocated for tourism related activities is outside the scope of this study as the proposed uses do not relate to town centre leisure uses.

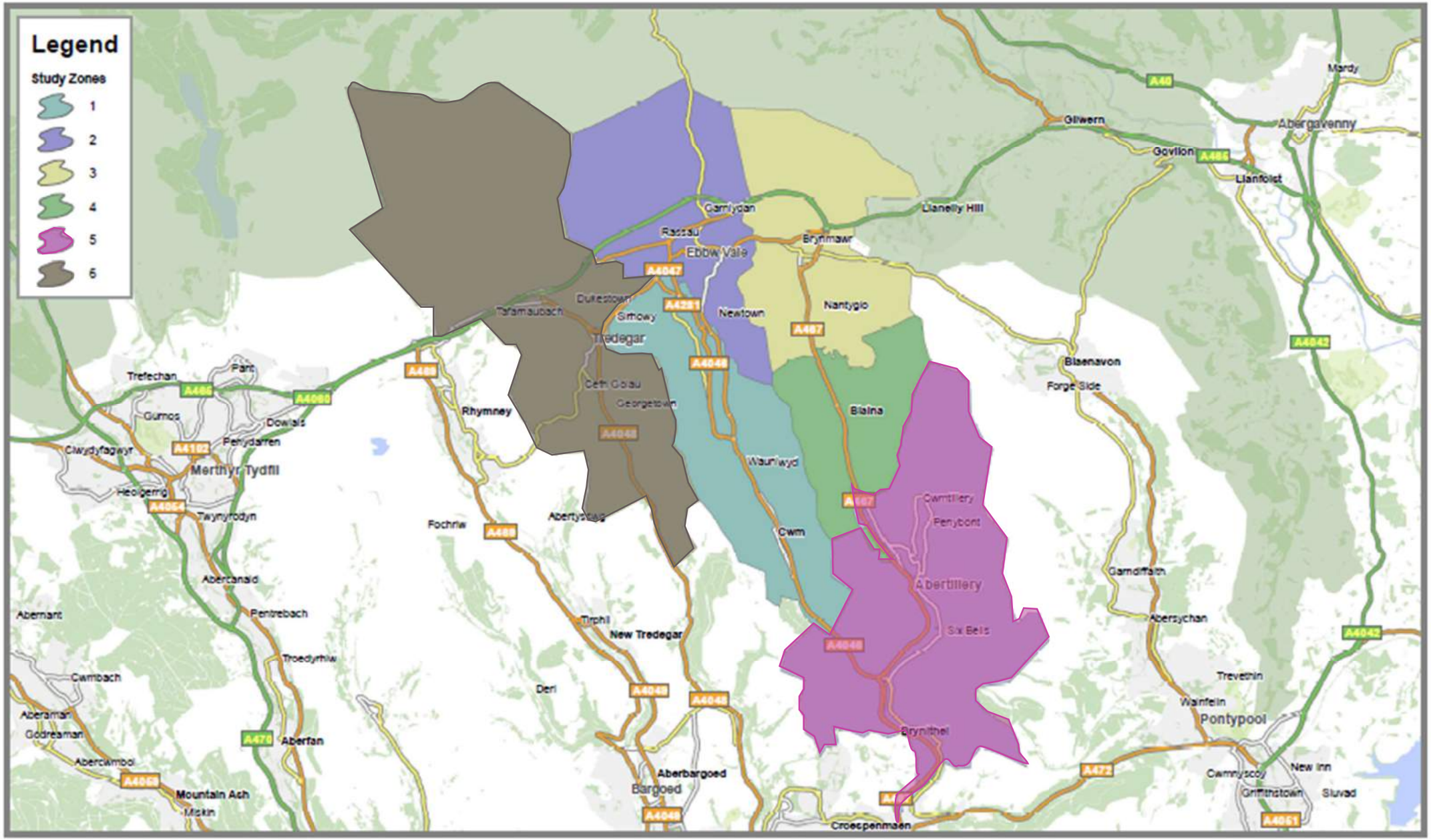
Final Draft

APPENDIX 1

HOUSEHOLD SURVEY STUDY AREA AND QUESTIONNAIRE

Blaenau Gwent Retail Study

Experian



Copyright Experian Ltd, HERE 2020. Ordnance Survey © Crown copyright 2020.

Micromarketer

NEMS market research
22 Manor Way
Belasis Hall Technology Park
Billingham
TS23 4HN
Tel 01642 37 33 55
www.nemsmr.co.uk

Blaenau Gwent Household Survey
for
RRPC

July 2020

Job Ref: 030620

This market research and the design of material used to obtain this survey information have been originated by and belong to NEMS market research and may not be used or reproduced in whole or part without the company's written consent, or that of the Client.

Table of Contents

Introduction:

Research Background & Objectives	3
Research Methodology	3
Sampling	3
Weightings	5
Statistical Accuracy	7
Data Tables	8

Appendices:

Data Tabulations -

By Zone	9-59
By Zone (Weighted)	61-113
By Zone – Filtered Nulls &	115-165
By Zone – Filtered Nulls & SFT (Weighted)	167-219
By Postcode Sector	221-298
By Postcode Sector (Weighted)	300-381
By Postcode Sector – Filtered Nulls &	383-459
By Postcode Sector – Filtered Nulls & SFT (Weighted)	461-541

Sample Questionnaire

Introduction

1.1 Research Background & Objectives

To conduct a survey amongst residents in the Blaenau Gwent area to assess shopping habits for main food and grocery, non-food shopping and local centre usage.

1.2 Research Methodology

A total of 637 telephone interviews were conducted between Friday 26th June 2020 and Friday 10th July 2020. Interviews were conducted using NEMS in-house CATI (Computer Assisted Telephone Interviewing) Unit. Respondents were contacted during the day and in the evening. All respondents were the main shopper in the household, determined using a preliminary filter question.

1.3 Sampling

1.3.1 Survey Area

The survey area was segmented into 6 zones, defined using postcode sectors. The zone details were:

Zone	Postcode Sectors	Number of Interviews
Zone 1 - Ebbw Vale South	N23 6, NP23 7, NP23 8	111
Zone 2 - Ebbw Vale North	NP23 5	100
Zone 3 - Brynmawr	NP23 4	101
Zone 4 - Blaina	NP13 3	80
Zone 5 - Abertillery	NP13 1, NP13 2	125
Zone 6 - Tredegar	NP22 3, NP23 4	120
Total		**637**

1.3.2 Telephone Numbers

All available telephone numbers are used to obtain the sample of interviews. This includes published telephone numbers and ex-directory numbers as the demographic profile of this sub-set is different to the demographics of the published numbers. All numbers are randomly generated using the area code as a 'seed'. Business numbers are de-duped and excluded.

We don't screen against the TPS (Telephone Preference Service) database, again because the demographic profile of TPS registered numbers is slightly different to the rest of the population. In addition, there is no legal requirement to screen against TPS registered numbers; market research is not classified as unsolicited sales and marketing.

1.3.3 Sample Profile

It should be noted that as per the survey's requirements, the profile of respondents is that of the main shopper / person responsible for most of the food shopping in the household. As such it will always differ from the demographic profile of all adults within the survey area. With any survey among the main shopper / person responsible for most of the food shopping in the household the profile is typically biased more towards females and older people. The age of the main shopper / person responsible for most of the food shopping in the household is becoming older due to the financial constraints on young people setting up home.

A number of measures are put in place to ensure the sample is representative of the profile of the person responsible for most of the food / shopping in the household.

First of all, interviewing is normally spread over a relatively long period of time, certainly longer than the theoretical minimum time it would take. This allows us time to call back people who weren't in when we made the first phone call. If we only interview people who are at home the first time we call, we over-represent people who stay at home the most; these people tend to be older / less economically active.

We also control the age profile of respondents; this is a two-stage process. First of all, we look at the age profile of the survey area according to the latest Census figures. Using a by-product from additional data we collect from a weekly telephone survey of a representative sample of all adults across the country we know the age profile of the main shopper in any given area. This information is from data based on in excess of 100,000 interviews and is regularly

updated and is therefore probably the most accurate and up to date information of its kind.

Stratified random sampling helps ensure that the sample is as representative as possible. While the system dials the next randomly selected number for interviewers, all calls are made by interviewers; no automated call handling systems are used.

1.3.4 Time of Interviewing

Approximately two-thirds of all calls are made outside normal working hours.

1.3.5 Monitoring of Calls

At least 5% of telephone interviews are randomly and remotely monitored by Team Leaders to ensure the interviewing is conducted to the requisite standard. Both the dialogue and on-screen entries are monitored and evaluated. Interviewers are offered re-training should these standards not be met.

1.4 Weightings

To correct the small differences between the sample profile and population profile, the data was weighted. The population is of the main shopper in the household. Weightings have been applied to age bands based on an estimated age profile of main shoppers (see section 1.3.3 for details). The weighted totals differ occasionally from the adjusted population due to rounding error. Details of the age weightings are given in the table below:

Age	Main Shopper Profile (%)	Interviews Achieved	Age Weightings
18-34	21.10%	77	1.7452
35-44	17.50%	64	1.7414
45-54	18.04%	110	1.0448
55-64	18.28%	108	1.0779
65+	25.09%	278	0.5748
(Refused)	0	0	NA
Total		**637**	

Further weightings were then applied to adjust zone samples to be representative by population. Details of those weightings are given in the table below:

Zone	Population *	Interviews Achieved	Interviews Achieved (Weighted by Age)	Zone Weightings
1	12,592	111	111	1.0563
2	10,748	100	103	0.9727
3	10,165	101	93	1.0140
4	4,808	80	73	0.6142
5	15,019	125	137	1.0235
6	15,103	120	120	1.1673
Total	**68,435**	**637**		

* Source: Census 2011

1.5 Statistical Accuracy

As with any data collection where a sample is being drawn to represent a population, there is potentially a difference between the response from the sample and the true situation in the population as a whole. Many steps have been taken to help minimise this difference (e.g. random sample selection, questionnaire construction etc) but there is always potentially a difference between the sample and population – this is known as the standard error.

The standard error can be estimated using statistical calculations based on the sample size, the population size and the level of response measured (as you would expect you can potentially get a larger error in a 50% response than say a 10% response simply because of the magnitude of the numbers).

To help understand the significance of this error, it is normally expressed as a confidence interval for the results. Clearly to have 100% accuracy of the results would require you to sample the entire population. The usual confidence interval used is 95% - this means that you can be confident that in 19 out of 20 instances the actual population behaviour will be within the confidence interval range.

For example, if 50% of a sample of 637 answers "Yes" to a question, we can be 95% sure that between 47.7% and 52.3% of the population holds the same opinion (i.e. +/- 2.3%). The following is a guide showing confidence intervals attached to various sample sizes from the study:

%ge Response	95% confidence interval
10%	±2.3%
20%	±3.1%
30%	±3.6%
40%	±3.8%
50%	±3.9%

1.6 Data Tables

Tables are presented in question order with the question number analysed shown at the top of the table. Those questions where the respondent is prompted with a list of possible answers are indicated in the question text with a suffix of [PR].

The sample size for each question and corresponding column criteria is shown at the base of each table. A description of the criteria determining to whom the question applies is shown in italics directly below the question text; if there is no such text evident then the question base is the full study sample. If the tabulated data is weighted (indicated in the header of the tabulations), in addition to the sample base, the weighted base is also shown at the bottom of each table.

Unless indicated otherwise in the footer of the tabulations, all percentages are calculated down the column. Arithmetic rounding to whole numbers may mean that columns of percentages do not sum to exactly 100%. Zero per cent denotes a percentage of less than 0.05%.

Percentages are calculated on the number of respondents and not the number of responses. This means that where more than one answer can be given to a question the sum of percentages may exceed 100%. All such multi-response questions are indicated in the tabulated by a suffix of [MR] on the question text.

Where appropriate to the question, means are shown at the bottom of response tables. These are calculated in one of two ways: if the data is captured to a coded response a weighted mean is calculated and the code weightings are shown as a prefix above the question text; if actual specific values were captured from respondents these individual numbers are used to calculate the mean.

Appendix 9:

Sample Questionnaire

JN 030620
Blaenau Gwent Household Survey

Good morning / afternoon / evening, I am …… from NEMS market research, and we are conducting a short survey in your area about shopping, on behalf of Blaenau Gwent County Borough Council, this can be verified by calling Council and asking to speak to *Council's Contact Centre - the telephone number is 01495 311556*. Do you have time to answer some questions please? It will take about 7 minutes. If you would prefer we can also arange for you to take part in Welsh.

QA **Are you the person responsible, or jointly responsible for the main food shopping in your household?**

Yes
No

IF 'YES' – CONTINUE INTERVIEW.
IF 'NO' – ASK, COULD I SPEAK TO THE PERSON WHO IS RESPONSIBLE FOR MOST OF THE FOOD SHOPPING, IF NOT AVAILABLE THANK AND CLOSE INTERVIEW

READ OUT: In order to determine typical shopping patterns; on the following questions please EXCLUDE any unusual or special shopping trips you may have made due to the current COVID 19 situation.

READ OUT: Please note that whenever we mention household we mean you and anyone else living in your home.

Q01 **Before the restrictions imposed by Covid-19, in which store or shop (including the internet) did you buy most of your household's food and grocery shopping?**
DO NOT PROMPT. ONE ANSWER ONLY. IF THEY SAY VARIES ASK FOR ONE OF THE PLACES THEY USE MOST OFTEN FOR FOOD AND GROCERY SHOPPING.
IF 'OTHER' PLEASE SPECIFY LOCATION IF 'MARKET STALL' PROBE FOR LOCATION AND CODE IN OTHER as 'Market - Location'. PROBE FULLY FOR STORE / LOCATION.

#Convenience	Convenience List	GO TO Q02
500	Other (PLEASE WRITE IN)	GO TO Q02
501	Internet / delivery	GO TO Q02
502	(Don't know / varies)	**CLOSE**

Q02 **What percentage of your household's monthly food and grocery shopping spend is spent at (STORE MENTIONED AT Q01)?**
ONE ANSWER ONLY

1 All (100%) **- This means this is the only location they use for food shopping - please confirm this before choosing 100%**
2 Less than all (PLEASE WRITE IN PERCENTAGE)
3 (Don't know / varies)

At the analysis stage, a mean % to be produced in addtion to the following bandings.

Less than 30%
30 – 40%
41 – 50%
51 – 60%
61 – 70%
71 – 80%
81 – 90%
91 – 99%
100% (all)

NOT THOSE WHO SAID 'INTERNET / DELIVERY' AT Q01

Q03 **When you visit (STORE MENTIONED AT Q01), do you normally combine your shopping with other activities?**
DO NOT READ OUT. CAN BE MULTI-CODED. PROBE FULLY. Anything else?

1 Yes - non-food shopping
2 Yes - other food shopping
3 Yes - bars / pubs
4 Yes - bingo
5 Yes - cafés
6 Yes - cinemas
7 Yes - get petrol
8 Yes - go to park
9 Yes - gyms / health and fitness
A Yes - library
B Yes - markets
C Yes - meeting family
D Yes - meeting friends
E Yes - museums / art gallery
F Yes - other service (e.g. travel agent, estate agent etc.)
G Yes - personal service (e.g. hairdressers, beauty salon etc.)
H Yes - restaurants
I Yes - swimming
J Yes - theatre
K Yes - visiting services such as banks and other financial institutions
L Yes - work
M Yes - other (PLEASE WRITE IN)
N (No)
O (Don't know)

NOT THOSE WHO SAID 100% AT Q02

Q04 **In addition to (STORE MENTIONED AT Q01), where else would your household buy food and grocery items from during a normal month? This could be large or small purchases and so could include large grocery stores, local shops, farm shops or the internet.**

DO NOT PROMPT. CAN BE MULTICODED. PROBE FULLY. Anywhere else?
IF 'OTHER' PLEASE SPECIFY LOCATION IF 'MARKET STALL' PROBE FOR LOCATION AND CODE IN OTHER as 'Market - Location'. PROBE FULLY FOR STORE / LOCATION. IF INTERNET, PROBE FOR RETAILER

#Convenience	Convenience List
500	Other (PLEASE WRITE IN)
501	Internet / delivery
502	(Don't know)

Q05 **During the recent restrictions imposed as a result of Covid-19, where have you been undertaking your food and grocery shopping?**

DO NOT PROMPT. CAN BE MULTICODED. PROBE FULLY. Anywhere else?

#Convenience	Convenience List
500	Other (PLEASE WRITE IN)
501	Internet / delivery
502	(Don't know)

Q06 **As a result of your recent shopping experiences we would be interested in knowing whether this is likely to change how you do your food and grocery shopping in the future. Do you think it will, or will you go back to using the shops [mentioned in Q01 & Q04]?**

READ OUT

1	Yes, definitely change my habits	GO TO Q07
2	May change some of my shopping habits	GO TO Q07
3	I don't know if my food and grocery shopping habits will change	GO TO Q07
4	Unlikely to change	GO TO Q07
5	Definitely won't change	GO TO Q09
6	(Don't know)	GO TO Q09

Q07 **To help us understand how shopping patterns may change, please can you indicate the extent to which you agree or disagree with the following statements, where 1 = 'Disagree strongly; 2 = Disagree; 3 = Neither Agree nor Disagree; 4 = Agree and 5 = Agree Strongly**

ONE ANSWER FOR EACH STATEMENT

Disagree strongly|Disagree|Neither Agree nor Disagree|Agree|Agree Strongly

1	I will now use the internet / home delivery services for most of my food and grocery shopping.
2	I will now use the internet / home delivery services for more of my food and grocery shopping than previously but will continue to use the shops I did before as well
3	I am likely to shop on a less frequent basis for food and grocery items than I did immediately before Covid-19
4	I am likely to use my local independent shops more regularly for my food and grocery shopping than I did immediately before Covid-19

Q08 **Are there any other ways in which you think your food and grocery shopping will differ in the future?**
DO NOT PROMPT CAN BE MULTICODED

1	More trips
2	Fewer trips
3	Buying more in general on each trip
4	Buying less in general on each trip
5	Tend to buy everything in the one shop
6	More planning before each shop
7	Stockpiling in case of shortages
8	Less perishable items
9	More long life items
A	Shop nearer to home
B	Use smaller shops rather than big supermarkets
C	Use bigger shops rather than small shops
D	Trading down to the value / budget range
E	Trading up the best of / luxury range
F	Other (PLEASE WRITE IN)
G	(Don't know)
H	(Nothing)

READ OUT: We now have a few questions about where you go for non-food shopping. In answering these questions the location may be a town centre, a retail park, or a free standing store, or could be facilities such as the Internet, TV / interactive shopping or use of a home catalogue.

READ OUT: In order to determine typical shopping patterns; on the following questions please EXCLUDE any unusual or special shopping trips you may have made due to the current COVID 19 situation.

Q09 **Where does your household buy most of its clothing and footwear?**
DO NOT PROMPT. ONE ANSWER ONLY.
IF VARIES ASK IF THERE IS A LOCATION THEY USE MORE THAN OTHERS EVEN IF SLIGHTLY, IF STILL VARIES ASK THE PLACE THEY USED LAST .

#Comparison	Comparison List	
500	Other (PLEASE WRITE IN)	GO TO Q10
501	Internet / delivered	GO TO Q10
502	Home catalogue	GO TO Q10
503	TV / Interactive shopping	GO TO Q10
504	(Don't know)	**GO TO Q13**
505	(Don't do this type of shopping)	**GO TO Q13**

THOSE WHO DO CLOTHING AND FOOTWEAR SHOPPING AT Q09:

Q10 **What percentage of your clothing and footwear spend is spent at (LOCATION MENTIONED AT Q09) before the current Covid-19 situation?**
ONE ANSWER ONLY

1	All (100%) **- This means this is the only location they use for food shopping - please confirm this before choosing 100%**
2	Less than all (PLEASE WRITE IN PERCENTAGE)
3	(Don't know / varies)

At the analysis stage, a mean % to be produced in addtion to the following bandings.

Less than 30%
30 – 50%
51 – 70%
71 – 100%

NOT THOSE WHO SAID 100% OR 'DON'T KNOW / VARIES' AT Q10

Q11 **Where else does your household use regularly for clothing and footwear purchases?**

DO NOT READ OUT. CAN BE MULTI-CODED. PROBE FULLY. Anywhere else?

#Comparison	Comparison List
500	Other (PLEASE WRITE IN)
501	Internet / delivered
502	Home catalogue
503	TV / Interactive shopping

THOSE WHO DO CLOTHING AND FOOTWEAR SHOPPING AT Q09:

Q12 **Overall, what percentage of your household's annual spend on clothing and footwear was spent via the internet before Covid-19?**

ONE ANSWER ONLY

1	All (100%)
2	Less than all (PLEASE WRITE IN PERCENTAGE)
3	None
4	(Don't know / varies)

Q13 **Now thinking about other types of non-food shopping. When your household is shopping for personal care, medical and pharmaceutical goods and equipment, such as medicines, soap and toothpaste, make up, plasters and spectacles / contact lenses, where do you normally go? Please tell us about all the locations you use on a regular basis.**
DO NOT READ OUT. CAN BE MULTI-CODED. PROBE FULLY. Anywhere else?
IF VARIES ASK IF THERE IS A LOCATION THEY USE MORE THAN OTHERS EVEN IF SLIGHTLY, IF STILL VARIES ASK THE PLACE THEY USED LAST .

#Comparison	Comparison List	
500	Other (PLEASE WRITE IN)	GO TO Q14
501	Internet / delivered	GO TO Q14
502	Home catalogue	GO TO Q14
503	TV / Interactive shopping	GO TO Q14
504	(Don't know)	GO TO Q15
505	(Don't do this type of shopping)	GO TO Q15

THOSE WHO SHOP FOR MEDICAL AND PHARMACEUTICAL GOODS AT Q13:

Q14 **What percentage of your household's annual spend on medical and pharmaceutical goods and equipment was spent via the internet before Covid-19?**
ONE ANSWER ONLY

1 All (100%)
2 Less than all (PLEASE WRITE IN PERCENTAGE)
3 None
4 (Don't know / varies)

Q15 **When your household is shopping for recreational goods such as toys, games, sports and recreational equipment and items related to your hobbies, where do you normally go? Please tell us about all the locations you use on a regular basis.**

DO NOT READ OUT. CAN BE MULTI-CODED. PROBE FULLY. Anywhere else?
IF VARIES ASK IF THERE IS A LOCATION THEY USE MORE THAN OTHERS EVEN IF SLIGHTLY, IF STILL VARIES ASK THE PLACE THEY USED LAST .

#Comparison	Comparison List	
500	Other (PLEASE WRITE IN)	GO TO Q16
501	Internet / delivered	GO TO Q16
502	Home catalogue	GO TO Q16
503	TV / Interactive shopping	GO TO Q16
504	(Don't know)	GO TO Q17
505	(Don't do this type of shopping)	GO TO Q17

THOSE WHO SHOP FOR RECREATIONAL ITEMS AT Q15:

Q16 **What percentage of your household's annual spend on recreational goods such as toys, games, sports and recreational equipment and items related to your hobbies was spent via the internet before Covid-19?**
ONE ANSWER ONLY

1 All (100%)
2 Less than all (PLEASE WRITE IN PERCENTAGE)
3 None
4 (Don't know / varies)

Q17 **When your household is shopping for audio-visual goods such as televisions, cameras, computers and recording and recorded material (such as CDs and DVDs), where do you normally go? Please tell us about all the locations you use on a regular basis.**

DO NOT READ OUT. CAN BE MULTI-CODED. PROBE FULLY. Anywhere else?
IF VARIES ASK IF THERE IS A LOCATION THEY USE MORE THAN OTHERS EVEN IF SLIGHTLY, IF STILL VARIES ASK THE PLACE THEY USED LAST .

#Comparison	Comparison List	
500	Other (PLEASE WRITE IN)	GO TO Q18
501	Internet / delivered	GO TO Q18
502	Home catalogue	GO TO Q18
503	TV / Interactive shopping	GO TO Q18
504	(Don't know)	GO TO Q19
505	(Don't do this type of shopping)	GO TO Q19

THOSE WHO SHOP FOR AUDIO VISUAL ITEMS AT Q17:

Q18 **What percentage of your household's annual spend on audio-visual goods such as televisions, cameras, computers and recording and recorded material (such as CDs and DVDs) was spent via the internet before Covid-19?**
ONE ANSWER ONLY

1 All (100%)
2 Less than all (PLEASE WRITE IN PERCENTAGE)
3 None
4 (Don't know / varies)

Q19 **When your household is shopping for furniture, carpets and floor coverings, where do you normally go? Please tell us about all the locations you use on a regular basis.**
DO NOT READ OUT. CAN BE MULTI-CODED. PROBE FULLY. Anywhere else?
IF VARIES ASK IF THERE IS A LOCATION THEY USE MORE THAN OTHERS EVEN IF SLIGHTLY, IF STILL VARIES ASK THE PLACE THEY USED LAST .

#Comparison	Comparison List	
500	Other (PLEASE WRITE IN)	GO TO Q20
501	Internet / delivered	GO TO Q20
502	Home catalogue	GO TO Q20
503	TV / Interactive shopping	GO TO Q20
504	(Don't know)	GO TO Q21
505	(Don't do this type of shopping)	GO TO Q21

THOSE WHO SHOP FOR FURNITURE, CARPETS AND FLOOR COVERINGS AT Q19:

Q20 **What percentage of your household's annual spend on furniture, carpets and floor coverings was spent via the internet before Covid-19?**
ONE ANSWER ONLY

1 All (100%)
2 Less than all (PLEASE WRITE IN PERCENTAGE)
3 None
4 (Don't know / varies)

Q21 **When your household is shopping for items for the house including household textiles, tableware, glassware and non-electrical household utensils such as saucepans and cutlery, where do you normally go? Please tell us about all the locations you use on a regular basis.**
DO NOT READ OUT. CAN BE MULTI-CODED. PROBE FULLY. Anywhere else?
IF VARIES ASK IF THERE IS A LOCATION THEY USE MORE THAN OTHERS EVEN IF SLIGHTLY, IF STILL VARIES ASK THE PLACE THEY USED LAST .

#Comparison	Comparison List	
500	Other (PLEASE WRITE IN)	GO TO Q22
501	Internet / delivered	GO TO Q22
502	Home catalogue	GO TO Q22
503	TV / Interactive shopping	GO TO Q22
504	(Don't know)	GO TO Q23
505	(Don't do this type of shopping)	GO TO Q23

THOSE WHO SHOP FOR HOUSEHOLD TEXTILES AT Q21:

Q22 **What percentage of your household's annual spend on items for the house including household textiles, tableware, glassware and non-electrical household utensils such as saucepans and cutlery was spent via the internet before Covid-19?**

ONE ANSWER ONLY

1 All (100%)
2 Less than all (PLEASE WRITE IN PERCENTAGE)
3 None
4 (Don't know / varies)

Q23 **When your household is shopping for items for personal use such as jewellery, watches, travel and baby goods, where do you normally go? Please tell us about all the locations you use on a regular basis.**
DO NOT READ OUT. CAN BE MULTI-CODED. PROBE FULLY. Anywhere else?
IF VARIES ASK IF THERE IS A LOCATION THEY USE MORE THAN OTHERS EVEN IF SLIGHTLY, IF STILL VARIES ASK THE PLACE THEY USED LAST .

#Comparison	Comparison List	
500	Other (PLEASE WRITE IN)	GO TO Q24
501	Internet / delivered	GO TO Q24
502	Home catalogue	GO TO Q24
503	TV / Interactive shopping	GO TO Q24
504	(Don't know)	GO TO Q24
505	(Don't do this type of shopping)	GO TO Q25
		GO TO Q25

THOSE WHO SHOP FOR PERSONAL GOODS AT Q23:

Q24 **What percentage of your household's annual spend on items for personal use such as jewellery, watches, travel and baby goods was spent via the internet?**
ONE ANSWER ONLY

1 All (100%)
2 Less than all (PLEASE WRITE IN PERCENTAGE)
3 None
4 (Don't know / varies)

Q25 **When your household is shopping for books and stationery, where do you normally go? Please tell us about all the locations you use on a regular basis.**
DO NOT READ OUT. CAN BE MULTI-CODED. PROBE FULLY. Anywhere else?
IF VARIES ASK IF THERE IS A LOCATION THEY USE MORE THAN OTHERS EVEN IF SLIGHTLY, IF STILL VARIES ASK THE PLACE THEY USED LAST .

#Comparison	Comparison List	
500	Other (PLEASE WRITE IN)	GO TO Q26
501	Internet / delivered	GO TO Q26
502	Home catalogue	GO TO Q26
503	TV / Interactive shopping	GO TO Q26
504	(Don't know)	GO TO Q26
505	(Don't do this type of shopping)	GO TO Q27
		GO TO Q27

THOSE WHO SHOP FOR BOOKS & STATIONERY AT Q25:

Q26 **What percentage of your household's annual spend on books and stationery was spent via the internet before Covid-19?**
ONE ANSWER ONLY

1 All (100%)
2 Less than all (PLEASE WRITE IN PERCENTAGE)
3 None
4 (Don't know / varies)

Q27 **When your household is shopping for household appliances such as washing machines, fridges, cookers and kettles, where do you normally go? Please tell us about all the locations you use on a regular basis.**
DO NOT READ OUT. CAN BE MULTI-CODED. PROBE FULLY. Anywhere else?
IF VARIES ASK IF THERE IS A LOCATION THEY USE MORE THAN OTHERS EVEN IF SLIGHTLY, IF STILL VARIES ASK THE PLACE THEY USED LAST .

#Comparison	Comparison List	
500	Other (PLEASE WRITE IN)	GO TO Q28
501	Internet / delivered	GO TO Q28
502	Home catalogue	GO TO Q28
503	TV / Interactive shopping	GO TO Q28
504	(Don't know)	GO TO Q28
505	(Don't do this type of shopping)	GO TO Q29
		GO TO Q29

THOSE WHO SHOP FOR HOUSEHOLD APPLIANCES AT Q27:

Q28 **What percentage of your household's annual spend on household appliances such as washing machines, fridges, cookers and kettles was spent via the internet before Covid-19?**
ONE ANSWER ONLY

1 All (100%)
2 Less than all (PLEASE WRITE IN PERCENTAGE)
3 None
4 (Don't know / varies)

Q29 **When your household is shopping for DIY goods and equipment, items for the garden including plants and pet and pet-related goods, where do you normally go? Please tell us about all the locations you use on a regular basis.**
DO NOT READ OUT. CAN BE MULTI-CODED. PROBE FULLY. Anywhere else?
IF VARIES ASK IF THERE IS A LOCATION THEY USE MORE THAN OTHERS EVEN IF SLIGHTLY, IF STILL VARIES ASK THE PLACE THEY USED LAST .

#Comparison	Comparison List	
500	Other (PLEASE WRITE IN)	GO TO Q30
501	Internet / delivered	GO TO Q30
502	Home catalogue	GO TO Q30
503	TV / Interactive shopping	GO TO Q30
504	(Don't know)	GO TO Q31
505	(Don't do this type of shopping)	GO TO Q31

THOSE WHO SHOP FOR DIY AT Q29:

Q30 **What percentage of your household's annual spend on DIY goods and equipment, items for the garden including plants and pet and pet-related good was spent via the internet before Covid-19?**
ONE ANSWER ONLY

1 All (100%)
2 Less than all (PLEASE WRITE IN PERCENTAGE)
3 None
4 (Don't know / varies)

Q31 **During the Covid-19 restrictions, have you or members of your household purchased any items online or by mail order that you would previously have purchased in a shop?**
ONE ANSWER ONLY

1	Yes	GO TO Q32
2	No	GO TO Q35
3	(Don't know)	GO TO Q35

Q32 **Which of the following products have you or members of your household purchased online or by mail order that you would previously have purchased in a shop?**
READ OUT. CAN BE MULTI-CODED. CODE ALL THAT APPLY.

1 Clothing
2 Footwear
3 Personal care items such as soap, toothpaste, deodorants etc
4 Medical or pharmaceutical products
5 Recreational goods such as toys, games, sports and recreational equipment and items related to your hobbies
6 Audio-visual goods such as televisions, cameras, computers and recording and recorded material (such as CDs and DVDs)
7 Furniture, carpets and floor coverings
8 Items for the house including household textiles, tableware, glassware and non-electrical household utensils such as saucepans and cutlery

9 Items for personal use such as jewellery, watches, travel and baby goods
A Books and stationery
B Household appliances such as washing machines, fridges, cookers and kettles
C DIY goods and equipment
D Garden plants and equipment
E Pet and pet-related goods

Q33 **Given your recent experiences of purchasing these goods online / by mail order, how likely are you to use this method of shopping, or use it more, in the future?**
READ OUT ONE ANSWER ONLY

1 Very likely
2 Quite likely
3 Not sure
4 Quite unlikely
5 Very unlikely

Q34 **And which of the following product types (if any) are you likely to buy more of online / by mail order in the future?**
READ OUT. CAN BE MULTI-CODED. CODE ALL THAT APPLY.
Yes | No | Don't know

1 Clothing
2 Footwear
3 Personal care items such as soap, toothpaste, deodorants etc
4 Medical or pharmaceutical products
5 Recreational goods such as toys, games, sports and recreational equipment and items related to your hobbies
6 Audio-visual goods such as televisions, cameras, computers and recording and recorded material (such as CDs and DVDs)
7 Furniture, carpets and floor coverings
8 Items for the house including household textiles, tableware, glassware and non-electrical household utensils such as saucepans and cutlery

9 Items for personal use such as jewellery, watches, travel and baby goods
A Books and stationery
B Household appliances such as washing machines, fridges, cookers and kettles
C DIY goods and equipment
D Garden plants and equipment
E Pet and pet-related goods
None of these

READ OUT: I would now like to ask you some questions about your views on nearby Town and City Centres as a place for shopping, leisure activities, and using other services. Again please state how you acted before the Covid lockdown started.

Q35 **How frequently does your household visit the following locations for any purpose?**
ONE ANSWER FOR EACH LOCATION
At least 5 times a week|2-4 times a week|Once a week|Once a fortnight|At least once a month|Less often|Never|(Don't know / varies)

1	Abertillery Town Centre	GO TO Q36
2	Blaina Town Centre	GO TO Q38
3	Brynmawr Town Centre or the Lakeside Retail Park	GO TO Q40
4	Ebbw Vale Town Centre	GO TO Q42
5	Tredegar Town Centre	GO TO Q44
6	Newport City Centre	GO TO Q46
7	Cardiff City Centre	GO TO Q47
8	Cwmbran Town Centre	GO TO Q48
9	Merthyr Tydfil Town Centre	GO TO Q49
A	Festival Park, Ebbw Vale	**GO TO GEN**
B	Elsewhere in Cardiff	**GO TO GEN**
C	Elsewhere in Newport	**GO TO GEN**

THOSE WHO VISIT ABERTILLERY TOWN CENTRE AT Q35 AT LEAST ONCE A MONTH

Q36 **When you visit Abertillery town centre, how frequently do you undertake the following activities?**
READ OUT. CODE ONE RESPONSE FOR EACH ACTIVITY.

At least 5 times a week|2-4 times a week|Once a week|Once a fortnight|At least once a month|Less often|Never|(Don't know / varies)

1 Food or Non-food Shopping
2 Visit Financial and Business Services
3 Visit other service providers such as hairdressers / barbers, beauty salons or travel agents
4 Sports, health & fitness facilities
5 To visit bars / pubs
6 To visit cafes / coffee shops
7 To visit restaurants
8 For work
9 Other (PLEASE WRITE IN)

THOSE WHO VISIT ABERTILLERY TOWN CENTRE AT Q35 AT LEAST ONCE A MONTH

Q37 **Thinking about Abertillery town centre, how do you rate the town centre for the following facilities on a scale of 1 - 5 (where 1 is very poor and 5 is very good)?**
READ OUT. CODE ONE RESPONSE FOR EACH ACTIVITY.

1 very poor | 2 poor | 3 neither good nor poor | 4 good | 5 very good

1 The range and quality of shops
2 The range and quality of places to eat and drink
3 The availability of car parking
4 The ease of moving around the centre
5 The attractiveness and overall experience of visiting the centre

THOSE WHO VISIT BLAINA TOWN CENTRE AT Q35 AT LEAST ONCE A MONTH

Q38 **When you visit Blaina town centre, how frequently do you undertake the following activities?**
READ OUT. CODE ONE RESPONSE FOR EACH ACTIVITY.

At least 5 times a week|2-4 times a week|Once a week|Once a fortnight|At least once a month|Less often|Never|(Don't know / varies)

1 Food or Non-food Shopping
2 Visit Financial and Business Services
3 Visit other service providers such as hairdressers / barbers, beauty salons or travel agents
4 Sports, health & fitness facilities
5 To visit bars / pubs
6 To visit cafes / coffee shops
7 To visit restaurants
8 For work
9 Other (PLEASE WRITE IN)

THOSE WHO VISIT BLAINA TOWN CENTRE AT Q35 AT LEAST ONCE A MONTH

Q39 **Thinking about Blaina town centre, how do you rate the town centre for the following facilities on a scale of 1 - 5 (where 1 is very poor and 5 is very good)?**
READ OUT. CODE ONE RESPONSE FOR EACH ACTIVITY.

1 very poor | 2 poor | 3 neither good nor poor | 4 good | 5 very good

1 The range and quality of shops
2 The range and quality of places to eat and drink
3 The availability of car parking
4 The ease of moving around the centre
5 The attractiveness and overall experience of visiting the centre

THOSE WHO VISIT BRYNMAWR TOWN CENTRE OR LAKESIDE RETAIL PARK AT Q35 AT LEAST ONCE A MONTH

Q40 **When you visit Brynmawr town centre or Lakeside Retail Park, how frequently do you undertake the following activities?**
READ OUT. CODE ONE RESPONSE FOR EACH ACTIVITY.

At least 5 times a week|2-4 times a week|Once a week|Once a fortnight|At least once a month|Less often|Never|(Don't know / varies)

1 Food or Non-food shopping in Brynmawr town centre
2 Food or Non-food shopping at the Lakeside Retail Park
3 Visit Financial and Business Services
4 Visit other service providers such as hairdressers / barbers, beauty salons or travel agents
5 Sports, health & fitness facilities
6 To visit bars / pubs
7 To visit cafes / coffee shops
8 To visit restaurants
9 For work
A Other (PLEASE WRITE IN)

THOSE WHO VISIT BRYNMAWR TOWN CENTRE AT Q35 AT LEAST ONCE A MONTH

Q41 **Thinking about Brynmawr town centre or Lakeside Retail Park, how do you rate the town centre / retail park for the following facilities on a scale of 1 - 5 (where 1 is very poor and 5 is very good)?**
READ OUT. CODE ONE RESPONSE FOR EACH ACTIVITY.

1 very poor | 2 poor | 3 neither good nor poor | 4 good | 5 very good

1 The range and quality of shops
2 The range and quality of places to eat and drink
3 The availability of car parking
4 The ease of moving around the centre
5 The attractiveness and overall experience of visiting the centre

THOSE WHO VISIT EBBW VALE TOWN CENTRE AT Q35 AT LEAST ONCE A MONTH

Q42 **When you visit Ebbw Vale town centre, how frequently do you undertake the following activities?**
READ OUT. CODE ONE RESPONSE FOR EACH ACTIVITY.

At least 5 times a week|2-4 times a week|Once a week|Once a fortnight|At least once a month|Less often|Never|(Don't know / varies)

1 Food or Non-food Shopping
2 Visit Financial and Business Services
3 Visit other service providers such as hairdressers / barbers, beauty salons or travel agents
4 Sports, health & fitness facilities
5 To visit bars / pubs
6 To visit cafes / coffee shops
7 To visit restaurants
8 For work
9 Other (PLEASE WRITE IN)

THOSE WHO VISIT EBBW VALE TOWN CENTRE AT Q35 AT LEAST ONCE A MONTH

Q43 **Thinking about Ebbw Vale town centre, how do you rate the town centre for the following facilities on a scale of 1 - 5 (where 1 is very poor and 5 is very good)?**
READ OUT. CODE ONE RESPONSE FOR EACH ACTIVITY.

1 very poor | 2 poor | 3 neither good nor poor | 4 good | 5 very good

1 The range and quality of shops
2 The range and quality of places to eat and drink
3 The availability of car parking
4 The ease of moving around the centre
5 The attractiveness and overall experience of visiting the centre

THOSE WHO VISIT TREDEGAR TOWN CENTRE AT Q35 AT LEAST ONCE A MONTH

Q44 **When you visit Tredegar town centre, how frequently do you undertake the following activities?**
READ OUT. CODE ONE RESPONSE FOR EACH ACTIVITY.

At least 5 times a week|2-4 times a week|Once a week|Once a fortnight|At least once a month|Less often|Never|(Don't know / varies)

1 Food or Non-food Shopping
2 Visit Financial and Business Services
3 Visit other service providers such as hairdressers / barbers, beauty salons or travel agents
4 Sports, health & fitness facilities
5 To visit bars / pubs
6 To visit cafes / coffee shops
7 To visit restaurants
8 For work
9 Other (PLEASE WRITE IN)

THOSE WHO VISIT TREDEGAR TOWN CENTRE AT Q35 AT LEAST ONCE A MONTH

Q45 **Thinking about Tredegar town centre, how do you rate the town centre for the following facilities on a scale of 1 - 5 (where 1 is very poor and 5 is very good)?**
READ OUT. CODE ONE RESPONSE FOR EACH ACTIVITY.

1 very poor | 2 poor | 3 neither good nor poor | 4 good | 5 very good

1 The range and quality of shops
2 The range and quality of places to eat and drink
3 The availability of car parking
4 The ease of moving around the centre
5 The attractiveness and overall experience of visiting the centre

THOSE WHO VISIT NEWPORT TOWN CENTRE AT Q35 AT LEAST ONCE A MONTH

Q46 **What are the main activites you undertake when you visit Newport town centre**
DO NOY PROMPT CAN BE MULTICODED

1 Food or Non-food Shopping
2 Visit Financial and Business Services
3 Visit other service providers such as hairdressers / barbers, beauty salons or travel agents
4 Public or medical services
5 Sports, health & fitness facilities
6 To visit bars / pubs
7 To visit cafes / coffee shops
8 To visit restaurants
9 For work
A For business
B For education
C Other (PLEASE WRITE IN)

THOSE WHO VISIT CARDIFF CITY CENTRE AT Q35 AT LEAST ONCE A MONTH

Q47 **What are the main activites you undertake when you visit Cardiff city centre**
DO NOY PROMPT CAN BE MULTICODED

1 Food or Non-food Shopping
2 Visit Financial and Business Services
3 Visit other service providers such as hairdressers / barbers, beauty salons or travel agents
4 Public or medical services
5 Sports, health & fitness facilities
6 To visit bars / pubs
7 To visit cafes / coffee shops
8 To visit restaurants
9 For work
A For business
B For education
C Other (PLEASE WRITE IN)

THOSE WHO VISIT CWMBRAN TOWN CENTRE AT Q35 AT LEAST ONCE A MONTH

Q48 **What are the main activites you undertake when you visit Cwmbran town centre**
DO NOY PROMPT CAN BE MULTICODED

1 Food or Non-food Shopping
2 Visit Financial and Business Services
3 Visit other service providers such as hairdressers / barbers, beauty salons or travel agents
4 Public or medical services
5 Sports, health & fitness facilities
6 To visit bars / pubs
7 To visit cafes / coffee shops
8 To visit restaurants
9 For work
A For business
B For education
C Other (PLEASE WRITE IN)

THOSE WHO VISIT MERTHYR TYDFIL TOWN CENTRE AT Q35 AT LEAST ONCE A MONTH

Q49 **What are the main activites you undertake when you visit Merthyr Tydfil town centre**
DO NOY PROMPT CAN BE MULTICODED

1 Food or Non-food Shopping
2 Visit Financial and Business Services
3 Visit other service providers such as hairdressers / barbers, beauty salons or travel agents
4 Public or medical services
5 Sports, health & fitness facilities
6 To visit bars / pubs
7 To visit cafes / coffee shops
8 To visit restaurants
9 For work
A For business
B For education
C Other (PLEASE WRITE IN)

GEN **Gender of respondent.**
CODE FROM OBSERVATION

1 Male
2 Female

AGE **Would you mind telling me how old you are?**
ONE ANSWER ONLY. DO NOT READ OUT

1 18 to 24
2 25 to 34
3 35 to 44
4 45 to 54
5 55 to 64
6 65 +
7 (Refused)

ADU **How many adults, including yourself, live in your household (16 years and above)?**
DO NOT PROMPT. ONE ANSWER ONLY.

1 One
2 Two
3 Three
4 Four
5 Five or more
6 (Refused)

CHI **How many children live in your household, aged 15 and under?**
DO NOT PROMPT. ONE ANSWER ONLY.

1 None
2 One
3 Two
4 Three
5 Four
6 Five or more
7 (Refused)

CAR **How many cars does your household own or have the use of?**
ONE ANSWER ONLY. DO NOT READ OUT

1 None
2 One
3 Two
4 Three or more
5 (Refused)

Thank & close

APPENDIX 2

HOUSEHOLD SURVEY RESULTS (WEIGHTED)

Appendix 2:

Data Tabulations

By Zone

(Weighted)

Q01 Before the restrictions imposed by Covid-19, in which store or shop (including the internet) did you buy most of your household's food and grocery shopping?

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Aldi, Blackwood Gate Retail Park, Blackwood, NP12 2FS	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	5	0.0%	0
Aldi, Interchange, Risca, NP11 6NP	0.4%	3	0.0%	0	0.0%	0	1.2%	1	1.5%	1	0.8%	1	0.0%	0
Aldi, Monmouth Road, Abergavenny, NP7 5HF	0.4%	3	0.0%	0	0.0%	0	0.0%	0	2.3%	1	1.3%	2	0.0%	0
Aldi, The Walk, Ebbw Vale, NP23 6AY	15.5%	99	23.6%	28	26.5%	27	15.1%	14	10.7%	5	10.4%	15	8.0%	11
Asda, Dowlais Top, Merthyr Tydfil	2.3%	15	1.5%	2	2.1%	2	1.7%	2	0.0%	0	0.4%	1	6.0%	8
Asda, High Street, Blackwood	2.0%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.9%	12	0.0%	0
Asda, Lakeside Retail Park, Nanytyglo, Brynmawr, NP23 4SL	19.2%	123	6.5%	8	9.4%	9	54.7%	52	59.2%	26	14.0%	20	5.5%	8
Co-op, 53 High Street, Blaina, NP13 3XB	0.3%	2	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.4%	1	0.0%	0
Farmfoods, Gwent Shopping Centre, Tredegar	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	3
Farmfoods, Lakeside Retail Park, Nanytyglo, Brynmawr	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Iceland, 31 High Street, Abertillery, NP13 1AG	1.5%	10	0.0%	0	0.0%	0	0.0%	0	1.5%	1	6.6%	9	0.0%	0
Iceland, Unit 1, The Walk, Ebbw Vale Retail Park, Ebbw Vale, NP23 6DL	2.0%	13	5.0%	6	5.1%	5	1.9%	2	0.8%	0	0.0%	0	0.0%	0
Lidl, Gelli Road, Tredegar	4.7%	30	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.9%	29
Lidl, Penygarnddu Industrial Estate, Merthyr Tydfil	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.8%	1	1.3%	2
Morrisons, Azalea Road, Rogerstone, Newport, NP10 9HZ	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Morrisons, Beaufort Road, Ebbw Vale, NP23 5WS	15.4%	98	12.4%	15	23.8%	24	10.7%	10	1.6%	1	4.9%	7	30.0%	42
Morrisons, Grange Road, Cwmbran, NP44 1QP	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Morrisons, Park Road, Abergavenny, NP7 5TP	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0
Sainsbury's, Newbridge Road Industrial Estate, Blackwood	0.4%	3	0.5%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0
Tesco Extra, Pontymister Industrial Estate, Risca, NP11 6NP	1.2%	8	0.0%	0	0.0%	0	0.0%	0	1.4%	1	4.9%	7	0.0%	0
Tesco, Castle Street, Abertillery, NP13 1UR	8.1%	51	0.0%	0	0.0%	0	0.0%	0	5.6%	2	34.9%	49	0.0%	0
Tesco, New Road, Hengoed, Merthyr Tydfil, CF82 7DP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Tesco, North West Approach, Ebbw Vale, NP23 6TS	20.1%	128	46.0%	54	29.4%	29	8.3%	8	3.2%	1	3.7%	5	21.4%	30
Waitrose, Merthyr Road, Abergavenny, NP7 9LL	0.4%	3	1.0%	1	0.0%	0	1.1%	1	0.0%	0	0.4%	1	0.0%	0
Internet / delivery	2.5%	16	0.5%	1	3.8%	4	4.1%	4	2.2%	1	1.5%	2	3.2%	4
Marks & Spencer, Cyfarthfa Retail Park, Merthyr Tydfil CF48 1HY	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Aldi, Brecon LD3 7ED	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Home Bargains, Tredegar NP22 3EJ	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Brynmawr	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Merthyr Tydfil	0.3%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rassau	0.2%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Commercial St Gwent Square Shopping Centre, Tredegar NP22 3EJ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120

Column %ges.

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Mean score: [%]														
Q02 What percentage of your household's monthly food and grocery shopping spend is spent at (STORE MENTIONED AT Q01)?														
None	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
1 - 10%	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3
11 - 20%	1.0%	7	0.9%	1	0.0%	0	0.0%	0	4.8%	2	0.0%	0	2.4%	3
21 - 30%	1.2%	8	2.4%	3	1.1%	1	1.2%	1	1.4%	1	0.4%	1	0.9%	1
31 - 40%	2.2%	14	1.6%	2	4.9%	5	2.3%	2	3.2%	1	2.9%	4	0.0%	0
41 - 50%	14.6%	93	19.3%	23	10.2%	10	8.8%	8	9.4%	4	15.5%	22	18.5%	26
51 - 60%	9.6%	61	3.0%	4	14.7%	15	11.5%	11	3.2%	1	8.6%	12	13.2%	19
61 - 70%	10.3%	66	8.8%	10	13.2%	13	8.9%	8	3.8%	2	12.2%	17	10.5%	15
71 - 80%	24.1%	153	18.3%	21	25.5%	25	25.9%	25	33.8%	15	26.9%	38	20.8%	29
81 - 90%	15.6%	99	17.3%	20	14.0%	14	20.9%	20	20.8%	9	9.8%	14	15.8%	22
91 - 99%	5.6%	36	7.2%	8	5.4%	5	7.1%	7	6.8%	3	6.2%	9	2.4%	3
100%	13.2%	84	16.6%	19	11.0%	11	12.7%	12	13.0%	6	17.6%	25	8.1%	11
(Don't know / varies)	2.1%	13	4.5%	5	0.0%	0	0.6%	1	0.0%	0	0.0%	0	5.1%	7
Mean:		*74.62*		*75.79*		*74.07*		*77.88*		*76.40*		*75.94*		*69.79*
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120
Q03 When you visit (STORE MENTIONED AT Q01), do you normally combine your shopping with other activities? [MR] *Not Internet at Q01*														
Yes - non-food shopping	12.1%	75	3.7%	4	12.7%	12	17.4%	16	24.5%	11	16.1%	22	7.5%	10
Yes - other food shopping	9.8%	61	2.5%	3	13.6%	13	12.6%	11	10.4%	5	16.1%	22	5.2%	7
Yes - bars / pubs	0.3%	2	0.0%	0	1.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Yes - bingo	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - cafés	2.5%	15	1.0%	1	5.2%	5	2.5%	2	4.7%	2	2.9%	4	0.5%	1
Yes - cinemas	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - get petrol	2.6%	16	1.0%	1	2.7%	3	2.6%	2	0.8%	0	5.4%	7	1.9%	3
Yes - go to park	0.4%	3	0.0%	0	0.6%	1	2.0%	2	0.8%	0	0.0%	0	0.0%	0
Yes - gyms / health and fitness	0.9%	6	0.0%	0	1.8%	2	1.2%	1	0.0%	0	1.7%	2	0.5%	1
Yes - library	0.2%	1	0.0%	0	0.6%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Yes - markets	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.5%	1
Yes - meeting family	1.0%	6	0.0%	0	1.7%	2	1.8%	2	0.0%	0	2.2%	3	0.0%	0
Yes - meeting friends	1.0%	6	1.6%	2	0.0%	0	1.9%	2	2.4%	1	0.0%	0	1.0%	1
Yes - museums / art gallery	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - other service (e.g. travel agent, estate agent etc.)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - personal service (e.g. hairdressers, beauty salon etc.)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - restaurants	0.5%	3	0.5%	1	0.0%	0	0.6%	1	0.0%	0	0.4%	1	0.9%	1
Yes - swimming	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - theatre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - visiting services such as banks and other financial institutions	0.9%	5	0.0%	0	0.0%	0	2.6%	2	4.1%	2	0.4%	1	0.5%	1
Yes - work	2.6%	16	1.6%	2	2.8%	3	2.3%	2	3.0%	1	6.0%	8	0.0%	0
Yes - other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(No)	73.1%	454	88.2%	103	65.1%	63	61.9%	56	59.8%	26	63.9%	88	86.9%	118
(Don't know)	0.6%	4	0.9%	1	0.0%	0	0.6%	1	0.0%	0	0.8%	1	0.9%	1
Weighted base:		621		117		96		91		44		138		136
Sample:		623		110		97		98		78		123		117

Q04 In addition to (STORE MENTIONED AT Q01), where else would your household buy food and grocery items from during a normal month? This could be large or small purchases and so could include large grocery stores, local shops, farm shops or the internet. [MR]
Not 100% at Q01

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Abertilllery Convenience Store, 51 Somerset Street, Abertillery	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2	0.0%	0
Aldi, Blackwood Gate Retail Park, Blackwood, NP12 2FS	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.5%	1	0.0%	0
Aldi, Interchange, Risca, NP11 6NP	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0
Aldi, Monmouth Road, Abergavenny, NP7 5HF	0.5%	3	0.0%	0	0.6%	1	2.8%	2	0.0%	0	0.0%	0	0.0%	0
Aldi, Plymouth Street, Merthyr Tydfil, CF47 0TP	0.6%	3	0.6%	1	0.6%	1	0.7%	1	0.9%	0	0.0%	0	1.0%	1
Aldi, The Walk, Ebbw Vale, NP23 6AY	20.5%	114	29.7%	29	24.3%	22	26.2%	22	9.7%	4	12.8%	15	17.5%	23
Amphlett Butchers, 24 Church Street, Abertillery	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	0	1.0%	1	0.0%	0
Asda, Dowlais Top, Merthyr Tydfil	4.2%	23	2.3%	2	5.6%	5	0.0%	0	1.7%	1	0.9%	1	11.2%	15
Asda, High Street, Blackwood	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2	0.0%	0
Asda, Lakeside Retail Park, Nanytyglo, Brynmawr, NP23 4SL	15.0%	83	4.0%	4	15.3%	14	25.7%	21	13.4%	5	30.3%	35	3.0%	4
Asda, Llewelyn, Cwmbran	0.9%	5	0.0%	0	0.0%	0	1.3%	1	1.6%	1	2.9%	3	0.0%	0
Brynmawr Mini Market, 3 Beaufort Street, Brynmawr	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, 53 High Street, Blaina, NP13 3XB	3.5%	19	1.9%	2	0.0%	0	2.8%	2	34.4%	13	1.5%	2	0.0%	0
Costcutter, 28-30 Bailey Street, Brynmawr	0.2%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Farmfoods, Gwent Shopping Centre, Tredegar	3.6%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.5%	20
Farmfoods, Lakeside Retail Park, Nanytyglo, Brynmawr	4.8%	27	1.8%	2	4.4%	4	19.1%	16	4.4%	2	3.1%	4	0.0%	0
Fresh & Fruity, 7 Bethcar Street, Ebbw Vale	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Heron Frozen Foods / B&M Express, 32 Bethcar Street, Ebbw Vale, NP23 6HQ	0.2%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Iceland, 15 Graham Way, St Tydfil Square, Merthyr Tydfil, CF47 8EG	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, 31 High Street, Abertillery, NP13 1AG	4.5%	25	0.0%	0	0.0%	0	0.7%	1	6.4%	2	17.0%	20	1.6%	2
Iceland, Cibi Walk, Abergavenny	0.4%	2	0.0%	0	0.6%	1	2.1%	2	0.0%	0	0.0%	0	0.0%	0
Iceland, Unit 1, The Walk, Ebbw Vale Retail Park, Ebbw Vale, NP23 6DL	6.4%	35	21.6%	21	3.7%	3	3.3%	3	5.0%	2	0.0%	0	5.0%	6
Lidl, Gelli Road, Tredegar	6.7%	37	1.2%	1	1.1%	1	0.0%	0	0.9%	0	0.0%	0	26.7%	35
Lidl, Penygarnddu Industrial Estate, Merthyr Tydfil	0.7%	4	1.8%	2	0.0%	0	2.0%	2	0.0%	0	0.5%	1	0.0%	0
M&J Fruit and veg, 36 Church Street, Abertillery	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Meats R Us, 47 Beaufort Street, Brynmawr	0.2%	1	0.0%	0	0.0%	0	0.7%	1	0.9%	0	0.0%	0	0.0%	0
Morrisons, Azalea Road, Rogerstone, Newport, NP10 9HZ	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Morrisons, Beaufort Road, Ebbw Vale, NP23 5WS	20.0%	110	22.5%	22	35.0%	31	19.2%	16	6.3%	2	10.0%	12	21.1%	27
Morrisons, Grange Road, Cwmbran, NP44 1QP	0.2%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Morrisons, Park Road, Abergavenny, NP7 5TP	0.2%	1	0.6%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Orzeek International Shop, 52 Bethcar Street, Ebbw Vale	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Llewelyn Road,	0.3%	2	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Cwmbran														
Sainsbury's, Newbridge Road Industrial Estate, Blackwood	0.8%	4	1.9%	2	0.0%	0	0.0%	0	3.3%	1	1.0%	1	0.0%	0
Smarts Deli, 57 Beaufort Street, Brynmawr	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Tesco Extra, Beacons Place, Merthyr Tydfil, CF47 0AL	0.2%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Pontymister Industrial Estate, Risca, NP11 6NP	1.1%	6	0.0%	0	0.0%	0	1.3%	1	3.3%	1	3.0%	3	0.0%	0
Tesco, Castle Street, Abertillery, NP13 1UR	7.2%	40	0.0%	0	0.0%	0	6.0%	5	8.8%	3	27.1%	31	0.0%	0
Tesco, North West Approach, Ebbw Vale, NP23 6TS	17.5%	97	25.5%	25	29.2%	26	10.3%	8	11.3%	4	4.1%	5	21.7%	28
The Family Shopper, 91-92 High Street, Blaina	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Tutti Fruiti Greengrocers, 80-82 Bailey Street, Brynmawr	0.2%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Tyron Andrews family Butcher, 5 Commercial Street, Tredegar	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Waitrose, Merthyr Road, Abergavenny, NP7 9LL	1.3%	7	0.0%	0	1.9%	2	4.8%	4	0.9%	0	0.9%	1	0.0%	0
Wayne Grist Butchers, 21 Market Street, Ebbw Vale	1.4%	8	3.0%	3	4.3%	4	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Internet / delivery	2.1%	12	1.2%	1	3.0%	3	2.6%	2	3.5%	1	2.1%	2	1.6%	2
Home Bargains, Lakeside Shopping Centre, Ebbw Vale NP23 4SL	3.9%	21	3.6%	3	1.9%	2	7.6%	6	7.1%	3	5.7%	7	0.5%	1
Marks & Spencer, Cyfarthfa Retail Park, Merthyr Tydfil CF48 1HY	1.2%	7	1.2%	1	1.2%	1	0.0%	0	0.9%	0	0.0%	0	3.1%	4
Abergavenny	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0
Ebbw Vale	3.0%	17	7.1%	7	7.5%	7	2.0%	2	0.0%	0	0.5%	1	0.5%	1
Cwm	0.4%	2	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abertillery	1.4%	8	0.0%	0	0.0%	0	1.3%	1	1.6%	1	5.1%	6	0.0%	0
Crickhowell	0.8%	4	2.3%	2	1.1%	1	0.0%	0	2.8%	1	0.0%	0	0.0%	0
Blaina	0.3%	2	0.0%	0	0.0%	0	0.0%	0	4.4%	2	0.0%	0	0.0%	0
Home Bargains, James St, Ebbw Vale NP23 6JG	1.0%	6	5.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Merthyr Tydfil CF48 4TQ	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0
Tredegar	1.3%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	5.1%	7
Home Bargains, Tredegar NP22 3EJ	1.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	6
Brynmawr	1.5%	8	0.0%	0	0.6%	1	9.5%	8	0.0%	0	0.0%	0	0.0%	0
Cwmbran	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
B&M, Rassau, Ebbw Vale NP23 5YD	4.2%	23	8.5%	8	5.9%	5	4.1%	3	1.8%	1	0.9%	1	3.7%	5
Asda, Pontygwindy Rd, Caerphilly CF83 3SX	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Merthyr Tydfil	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llanhilleth	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	3	0.0%	0
CostCo, Capital Retail Park, Leckwith Rd, Cardiff CF11 8EG	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0
Nantyglo	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Rassau	0.2%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Hereford HR1 2AB	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Poundland, Lakeside Retail Park, Brynmawr, Nantyglo, Ebbw Vale NP23 4SL	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Marks & Spencer, Cwmbran NP44 1YD	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberbeeg	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Iceland, Monmouth NP25 3DY	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Lidl, Commercial St, Risca, Newport NP11 6AZ	0.2%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Lidl, Redbrook Rd, Mayhill, Monmouth NP25 3LY	0.2%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.5%	3	0.0%	0	1.9%	2	0.7%	1	0.0%	0	0.0%	0	0.5%	1
(Nowhere else)	0.9%	5	0.0%	0	0.0%	0	1.4%	1	3.7%	1	0.9%	1	0.9%	1
Weighted base:		553		98		89		83		39		115		129
Sample:		557		94		89		89		73		104		108

Q05 During the recent restrictions imposed as a result of Covid-19, where have you been undertaking your food and grocery shopping? [MR]

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Abertilllery Convenience Store, 51 Somerset Street, Abertillery	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0
Aldi, Blackwood Gate Retail Park, Blackwood, NP12 2FS	1.4%	9	1.6%	2	0.0%	0	0.0%	0	0.8%	0	4.6%	6	0.0%	0
Aldi, Interchange, Risca, NP11 6NP	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.8%	1	0.0%	0
Aldi, Monmouth Road, Abergavenny, NP7 5HF	0.6%	4	1.6%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Aldi, Plymouth Street, Merthyr Tydfil, CF47 0TP	0.2%	2	0.5%	1	0.0%	0	0.6%	1	0.8%	0	0.0%	0	0.0%	0
Aldi, The Walk, Ebbw Vale, NP23 6AY	17.4%	111	34.1%	40	30.2%	30	12.4%	12	7.0%	3	6.8%	10	11.5%	16
Aldi, Woodside Road, Cwmbran, NP44 3EW	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Amphlett Butchers, 24 Church Street, Abertillery	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	3	0.0%	0
Asda, Dowlais Top, Merthyr Tydfil	2.2%	14	0.5%	1	2.7%	3	3.5%	3	0.8%	0	0.0%	0	5.1%	7
Asda, High Street, Blackwood	2.0%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	11	0.9%	1
Asda, Lakeside Retail Park, Nanytyglo, Brynmawr, NP23 4SL	19.1%	122	4.9%	6	15.4%	15	51.3%	49	44.6%	20	17.8%	25	5.1%	7
Asda, Llewelyn, Cwmbran	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Co-op, 53 High Street, Blaina, NP13 3XB	2.1%	13	0.0%	0	0.0%	0	1.9%	2	22.1%	10	1.2%	2	0.0%	0
Farmfoods, Gwent Shopping Centre, Tredegar	2.1%	13	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	8.2%	12
Farmfoods, Lakeside Retail Park, Nanytyglo, Brynmawr	1.1%	7	0.0%	0	0.0%	0	6.4%	6	1.6%	1	0.4%	1	0.0%	0
Fresh & Fruity, 7 Bethcar Street, Ebbw Vale	0.4%	3	0.9%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Iceland, 15 Graham Way, St Tydfil Square, Merthyr Tydfil, CF47 8EG	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, 31 High Street, Abertillery, NP13 1AG	3.9%	25	0.0%	0	0.0%	0	0.0%	0	3.8%	2	16.5%	23	0.0%	0
Iceland, Unit 1, The Walk, Ebbw Vale Retail Park, Ebbw Vale, NP23 6DL	3.5%	22	11.0%	13	4.4%	4	0.6%	1	0.0%	0	0.0%	0	3.1%	4
Lidl, Gelli Road, Tredegar	8.5%	54	0.5%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	37.7%	53
Lidl, Penygarnddu Industrial Estate, Merthyr Tydfil	0.8%	5	0.0%	0	0.0%	0	1.8%	2	0.8%	0	0.0%	0	2.2%	3
M&J Fruit and veg, 36 Church Street, Abertillery	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	3	0.0%	0
Meats R Us, 47 Beaufort Street, Brynmawr	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Morrisons, Azalea Road, Rogerstone, Newport, NP10 9HZ	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Morrisons, Beaufort Road, Ebbw Vale, NP23 5WS	21.0%	134	28.2%	33	34.2%	34	10.7%	10	12.1%	5	6.3%	9	30.1%	42
Morrisons, Grange Road, Cwmbran, NP44 1QP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Morrisons, Park Road, Abergavenny, NP7 5TP	0.2%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.5%	1
Orzeek International Shop, 52 Bethcar Street, Ebbw Vale	0.3%	2	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Singh Supermarket, 1-4 Market Square, Ebbw Vale	0.6%	4	0.0%	0	1.7%	2	1.1%	1	0.0%	0	0.0%	0	0.9%	1
Tesco Extra, Beacons Place, Merthyr Tydfil, CF47 0AL	0.3%	2	0.5%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Pontymister Industrial Estate, Risca, NP11 6NP	1.5%	9	0.0%	0	0.0%	0	0.6%	1	1.4%	1	5.4%	7	0.5%	1
Tesco, Castle Street, Abertillery, NP13 1UR	14.1%	90	0.0%	0	0.0%	0	0.6%	1	12.4%	6	59.9%	84	0.0%	0

Column %ges.

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Tesco, New Road, Hengoed, Merthyr Tydfil, CF82 7DP	0.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, North West Approach, Ebbw Vale, NP23 6TS	21.7%	138	46.5%	55	37.8%	38	8.9%	8	11.0%	5	2.8%	4	20.4%	29
Tesco, Top Car Park, Pontypool, NP4 6JU	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
The Family Shopper, 91-92 High Street, Blaina	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Tyron Andrews family Butcher, 5 Commercial Street, Tredegar	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Waitrose, Merthyr Road, Abergavenny, NP7 9LL	1.1%	7	2.1%	2	0.0%	0	0.6%	1	0.0%	0	2.9%	4	0.0%	0
Wayne Grist Butchers, 21 Market Street, Ebbw Vale	0.9%	6	1.6%	2	3.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivery	16.0%	102	8.1%	10	21.8%	22	19.5%	18	16.2%	7	15.8%	22	16.2%	23
Home Bargains, Lakeside Shopping Centre, Ebbw Vale NP23 4SL	1.5%	9	0.0%	0	0.0%	0	4.0%	4	6.9%	3	1.7%	2	0.0%	0
Marks & Spencer, Cyfarthfa Retail Park, Merthyr Tydfil CF48 1HY	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.9%	1
Abergavenny	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0
Ebbw Vale	1.1%	7	2.0%	2	3.8%	4	0.0%	0	0.8%	0	0.0%	0	0.5%	1
Cwm	0.6%	4	3.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abertillery	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Crickhowell	0.5%	3	1.0%	1	1.0%	1	0.0%	0	2.4%	1	0.0%	0	0.0%	0
Blaina	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Home Bargains, James St, Ebbw Vale NP23 6JG	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tredegar	1.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	6
Home Bargains, Tredegar NP22 3EJ	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Brynmawr	1.1%	7	0.0%	0	0.6%	1	7.0%	7	0.0%	0	0.0%	0	0.0%	0
B&M, Rassau, Ebbw Vale NP23 5YD	2.2%	14	6.0%	7	2.1%	2	1.9%	2	0.0%	0	0.8%	1	1.4%	2
Llanhilleth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Nantyglo	0.4%	3	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Rassau	0.4%	3	0.0%	0	2.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Parc Pontypandy Crossways Retail Park, Caerphilly CF83 3NL	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Poundland, Lakeside Retail Park, Brynmawr, Nantyglo, Ebbw Vale NP23 4SL	0.3%	2	1.6%	2	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.4%	9	0.5%	1	1.7%	2	1.9%	2	1.6%	1	0.0%	0	2.7%	4
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120

Mean score: [Definitely change habits = 2, May change baits = 1, Uncertain = 0, Unlikely to change = -1, Definitely won't change = -2]

Q06 As a result of your recent shopping experiences we would be interested in knowing whether this is likely to change how you do your food and grocery shopping in the future. Do you think it will, or will you go back to using the shops [mentioned in Q01 & Q04]? [PR]

Yes, definitely change my habits	8.0%	51	9.7%	11	9.1%	9	10.1%	10	8.3%	4	9.0%	13	3.2%	4
May change some of my shopping habits	11.2%	71	6.1%	7	10.4%	10	14.9%	14	17.6%	8	11.1%	15	11.6%	16
I don't know if my food and grocery shopping habits will change	3.7%	23	4.0%	5	5.8%	6	3.1%	3	3.8%	2	4.6%	6	1.4%	2
Unlikely to change	8.0%	51	6.1%	7	6.8%	7	17.5%	17	12.6%	6	5.9%	8	4.5%	6
Definitely won't change	67.7%	431	70.1%	82	67.9%	68	50.7%	48	55.3%	25	69.4%	97	79.3%	112
(Don't know)	1.5%	9	4.1%	5	0.0%	0	3.7%	4	2.4%	1	0.0%	0	0.0%	0
Mean:		*-1.18*		*-1.26*		*-1.14*		*-0.87*		*-0.91*		*-1.16*		*-1.45*
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	

Mean score: [Disagree strongly = -2, Disagree = -1, Neither = 0, Agree = 1, Agree strongly= 2]

Q07 To help us understand how shopping patterns may change, please can you indicate the extent to which you agree or disagree with the following statements, where 1 = 'Disagree strongly; 2 = Disagree; 3 = Neither Agree nor Disagree; 4 = Agree and 5 = Agree Strongly [PR]
Not those who definitely won't change or don't know at Q06

I will now use the internet / home delivery services for most of my food and grocery shopping.

Disagree strongly	49.0%	96	36.5%	11	57.4%	18	47.9%	21	76.0%	14	42.6%	18	46.2%	13
Disagree	18.4%	36	21.4%	6	10.2%	3	14.1%	6	7.5%	1	27.3%	12	24.5%	7
Neither agree nor disagree	7.1%	14	12.1%	4	13.8%	4	4.9%	2	3.4%	1	5.6%	2	2.3%	1
Agree	13.8%	27	13.9%	4	13.3%	4	13.7%	6	9.4%	2	16.4%	7	13.5%	4
Agree strongly	11.7%	23	16.1%	5	5.3%	2	19.4%	8	3.7%	1	8.1%	3	13.5%	4
Mean:		*-0.79*		*-0.48*		*-1.01*		*-0.58*		*-1.43*		*-0.80*		*-0.76*
Weighted base:		196		30		32		43		19		43		29
Sample:		210		31		31		43		37		41		27

I will now use the internet / home delivery services for more of my food and grocery shopping than previously but will continue to use the shops I did

Disagree strongly	49.0%	96	40.3%	12	56.3%	18	46.6%	20	70.7%	13	38.7%	17	54.7%	16
Disagree	11.2%	22	7.8%	2	8.4%	3	11.5%	5	1.9%	0	19.4%	8	11.6%	3
Neither agree nor disagree	6.6%	13	16.2%	5	8.4%	3	0.0%	0	0.0%	0	1.4%	1	16.3%	5
Agree	21.3%	42	15.9%	5	16.6%	5	28.9%	12	18.4%	3	29.6%	13	10.7%	3
Agree strongly	11.8%	23	19.9%	6	10.2%	3	12.9%	6	9.0%	2	10.9%	5	6.6%	2
Mean:		*-0.64*		*-0.33*		*-0.84*		*-0.50*		*-1.07*		*-0.45*		*-0.97*
Weighted base:		196		30		32		43		19		43		29
Sample:		210		31		31		43		37		41		27

I am likely to shop on a less frequent basis for food and grocery items than I did immediately before Covid-19

Disagree strongly	29.4%	58	17.9%	5	24.8%	8	24.9%	11	40.8%	8	44.1%	19	24.0%	7
Disagree	9.9%	19	2.0%	1	8.4%	3	12.0%	5	14.5%	3	8.3%	4	15.8%	5
Neither agree nor disagree	6.4%	13	7.8%	2	3.2%	1	8.2%	4	7.1%	1	2.5%	1	11.3%	3
Agree	27.1%	53	39.3%	12	24.5%	8	31.8%	14	12.9%	2	17.9%	8	32.9%	10
Agree strongly	27.3%	53	33.0%	10	39.2%	13	23.1%	10	24.6%	5	27.2%	12	16.0%	5
Mean:		*0.13*		*0.68*		*0.45*		*0.16*		*-0.34*		*-0.24*		*0.01*
Weighted base:		196		30		32		43		19		43		29
Sample:		210		31		31		43		37		41		27

I am likely to use my local independent shops more regularly for my food and grocery shopping than I did immediately before Covid-19

Disagree strongly	19.8%	39	13.8%	4	16.9%	5	23.5%	10	30.9%	6	14.5%	6	24.6%	7
Disagree	11.8%	23	11.5%	3	6.7%	2	20.6%	9	5.6%	1	9.7%	4	11.6%	3
Neither agree nor disagree	7.9%	16	21.5%	7	4.9%	2	7.4%	3	13.2%	2	2.5%	1	2.3%	1
Agree	35.1%	69	33.6%	10	36.7%	12	30.4%	13	25.1%	5	42.4%	18	37.4%	11
Agree strongly	25.4%	50	19.5%	6	34.8%	11	18.0%	8	25.2%	5	30.9%	13	24.1%	7
Mean:		*0.34*		*0.34*		*0.66*		*-0.01*		*0.08*		*0.65*		*0.25*
Weighted base:		196		30		32		43		19		43		29
Sample:		210		31		31		43		37		41		27

Q08 Are there any other ways in which you think your food and grocery shopping will differ in the future? [MR]
Not those who definitely won't change or don't know at Q06

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
More trips	1.9%	4	0.0%	0	6.4%	2	0.0%	0	3.5%	1	2.5%	1	0.0%	0
Fewer trips	15.0%	30	13.6%	4	17.0%	5	12.9%	6	21.4%	4	12.0%	5	18.0%	5
Buying more in general on each trip	4.7%	9	2.0%	1	3.3%	1	5.5%	2	0.0%	0	9.2%	4	4.3%	1
Buying less in general on each trip	0.9%	2	2.0%	1	0.0%	0	2.5%	1	0.0%	0	0.0%	0	0.0%	0
Tend to buy everything in the one shop	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0
More planning before each shop	4.7%	9	0.0%	0	3.2%	1	9.8%	4	1.9%	0	8.3%	4	0.0%	0
Stockpiling in case of shortages	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less perishable items	1.8%	3	0.0%	0	5.3%	2	0.0%	0	0.0%	0	4.2%	2	0.0%	0
More long life items	0.5%	1	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0	0.0%	0
Shop nearer to home	1.7%	3	0.0%	0	0.0%	0	0.0%	0	1.9%	0	4.0%	2	4.2%	1
Use smaller shops rather than big supermarkets	8.1%	16	11.9%	4	8.3%	3	7.5%	3	1.9%	0	5.2%	2	13.3%	4
Use bigger shops rather than small shops	0.7%	1	0.0%	0	0.0%	0	2.5%	1	1.9%	0	0.0%	0	0.0%	0
Trading down to the value / budget range	1.1%	2	0.0%	0	0.0%	0	2.5%	1	5.7%	1	0.0%	0	0.0%	0
Trading up the best of / luxury range	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	5.1%	10	15.8%	5	8.5%	3	0.0%	0	3.7%	1	4.2%	2	0.0%	0
(Nothing)	63.0%	124	60.6%	18	56.7%	18	67.2%	29	58.2%	11	66.4%	28	64.6%	19
Weighted base:		196		30		32		43		19		43		29
Sample:		210		31		31		43		37		41		27

Column %ges.

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Q09 Where does your household buy most of its clothing and footwear?														
Asda, Dowlais Top, Merthyr Tydfil	0.7%	4	0.0%	0	1.0%	1	0.6%	1	0.0%	0	0.0%	0	1.8%	3
Asda, High Street, Blackwood	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Asda, Lakeside Retail Park, Nanytyglo, Brynmawr, NP23 4SL	2.4%	15	1.9%	2	1.0%	1	6.6%	6	6.8%	3	2.0%	3	0.0%	0
Marks & Spencer, Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	0.7%	4	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	1.9%	3
Morrisons, Azalea Road, Rogerstone, Newport, NP10 9HZ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Morrisons, Beaufort Road, Ebbw Vale, NP23 5WS	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peacocks, 41/44 Church Street, Abertillery, NP13 1DB	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Peacocks, Lakeside Retail Park, Brynmawr	0.3%	2	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0
Peacocks, Unit 1, Market Street, Ebbw Vale, NP23 6HP	0.4%	2	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Sainsbury's, Newbridge Road Industrial Estate, Blackwood	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Tesco, North West Approach, Ebbw Vale, NP23 6TS	0.5%	3	1.0%	1	0.0%	0	1.2%	1	0.0%	0	0.8%	1	0.0%	0
Abergavenny Town Centre	0.8%	5	1.0%	1	0.6%	1	0.0%	0	2.4%	1	0.4%	1	1.3%	2
Abertillery Town Centre	1.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	6	0.0%	0
Blackwood Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Brynmawr Town Centre	0.4%	2	0.0%	0	0.0%	0	1.9%	2	1.6%	1	0.0%	0	0.0%	0
Cardiff City Centre	8.2%	52	7.1%	8	8.0%	8	4.1%	4	6.0%	3	7.9%	11	13.2%	18
Cwmbran Town Centre	12.8%	81	4.4%	5	7.8%	8	17.4%	16	15.4%	7	28.9%	40	3.4%	5
Ebbw Vale Town Centre	4.3%	28	12.6%	15	6.4%	6	3.0%	3	0.0%	0	2.1%	3	0.5%	1
Merthyr Tydfil Town Centre	1.3%	8	0.9%	1	0.0%	0	1.2%	1	0.8%	0	0.8%	1	3.3%	5
Newport City Centre	1.0%	6	0.0%	0	1.0%	1	1.2%	1	1.5%	1	2.5%	3	0.0%	0
Tredegar Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Cwmbran Retail Park, Cwmbran Drive, Cwmbran (B&Q, Currys, Next, Dreams, Halfords)	1.0%	6	1.6%	2	0.0%	0	3.0%	3	1.4%	1	0.8%	1	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil (B&Q, Matalan, M&S, Boots, Next)	19.1%	122	21.3%	25	27.7%	28	16.8%	16	12.6%	6	2.4%	3	31.3%	44
Dowlais Top Retail Park, Merthyr Tydfil (Carpetright, B&M)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Festival Park Factory Outlet Shopping Centre, Ebbw Vale (Sports Direct, Mountain Warehouse, Holland & Barrett, Claire's, The Works)	6.8%	43	11.2%	13	8.1%	8	5.6%	5	7.6%	3	5.4%	8	4.1%	6
Lakeside Retail Park, Nantyglo, Brynmawr (Asda, Halfords, Pets at Home, Home Bargains)	1.1%	7	0.0%	0	0.0%	0	4.4%	4	6.3%	3	0.0%	0	0.0%	0
Newport Retail Park (Spytty Retail Park), Spytty Road, Newport	0.4%	2	1.0%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	30.1%	192	28.7%	34	31.3%	31	21.5%	20	28.4%	13	36.1%	51	30.7%	43
Home catalogue	1.1%	7	0.5%	1	1.0%	1	0.0%	0	5.3%	2	0.0%	0	2.3%	3
TV / Interactive shopping	0.2%	2	0.0%	0	0.0%	0	1.2%	1	0.8%	0	0.0%	0	0.0%	0
Blackpool	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.5%	1
Marks & Spencer, Culverhouse, Cardiff	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
McArthurGlen Designer Outlet, Bridgend	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontypool	0.3%	2	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Swansea	0.6%	4	0.0%	0	1.7%	2	0.0%	0	0.8%	0	0.0%	0	1.4%	2
(Don't know)	0.6%	4	0.5%	1	1.7%	2	1.2%	1	0.8%	0	0.0%	0	0.0%	0
(Don't do this type of shopping)	1.5%	10	3.0%	3	1.0%	1	1.8%	2	0.8%	0	0.4%	1	1.8%	3
(Nowhere else)	0.3%	2	0.9%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120

Mean score: [%]

Q10 What percentage of your clothing and footwear spend is spent at (LOCATION MENTIONED AT Q09) before the current Covid-19 situation?
Not Don't know and not Don't do at Q09

None	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
1 - 10%	1.4%	8	2.7%	3	2.1%	2	0.6%	1	0.8%	0	0.0%	0	1.8%	2
11 - 20%	3.1%	19	5.7%	7	2.3%	2	6.1%	6	3.1%	1	1.5%	2	1.0%	1
21 - 30%	5.5%	34	5.6%	6	2.8%	3	10.4%	10	4.0%	2	7.1%	10	2.8%	4
31 - 40%	2.4%	15	3.1%	3	1.1%	1	3.0%	3	1.6%	1	2.1%	3	2.8%	4
41 - 50%	21.7%	135	23.2%	26	23.3%	23	17.1%	16	19.5%	9	26.7%	37	18.2%	25
51 - 60%	6.8%	42	3.6%	4	10.0%	10	11.1%	10	5.5%	2	2.9%	4	8.5%	12
61 - 70%	7.5%	46	4.1%	5	9.1%	9	3.6%	3	8.6%	4	8.0%	11	10.6%	15
71 - 80%	17.5%	109	15.8%	18	16.6%	16	14.4%	13	15.8%	7	22.2%	31	17.2%	24
81 - 90%	8.4%	52	8.1%	9	9.5%	9	8.5%	8	12.3%	5	11.6%	16	3.3%	5
91 - 99%	2.3%	14	4.2%	5	1.7%	2	1.8%	2	2.4%	1	3.6%	5	0.0%	0
100%	19.4%	121	18.2%	21	18.6%	18	16.4%	15	25.5%	11	12.9%	18	27.6%	38
(Don't know / varies)	4.2%	26	5.7%	6	2.9%	3	7.0%	6	0.8%	0	1.3%	2	6.2%	9
Mean:		*69.07*		*66.50*		*69.60*		*64.90*		*73.44*		*68.55*		*72.63*
Weighted base:		623		113		97		92		44		139		138
Sample:		619		106		98		96		78		124		117

Q11 Where else does your household use regularly for clothing and footwear purchases? [MR]
Not 100% and not Don't know at Q10

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Asda, Dowlais Top, Merthyr Tydfil	2.1%	10	0.7%	1	0.7%	1	0.0%	0	2.2%	1	0.0%	0	8.7%	8
Asda, High Street, Blackwood	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0
Asda, Lakeside Retail Park, Nanytyglo, Brynmawr, NP23 4SL	6.1%	29	3.4%	3	7.2%	5	7.2%	5	7.1%	2	10.0%	12	1.3%	1
Asda, Llewelyn, Cwmbran	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0
Marks & Spencer, Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	0.3%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.7%	1
Morrisons, Beaufort Road, Ebbw Vale, NP23 5WS	0.5%	2	0.7%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Peacocks, Lakeside Retail Park, Brynmawr	0.6%	3	0.0%	0	2.2%	2	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Peacocks, Unit 1, Market Street, Ebbw Vale, NP23 6HP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Sainsbury's, Newbridge Road Industrial Estate, Blackwood	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Tesco Extra, Pontymister Industrial Estate, Risca, NP11 6NP	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	3	0.0%	0
Tesco, Castle Street, Abertillery, NP13 1UR	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0
Tesco, North West Approach, Ebbw Vale, NP23 6TS	3.2%	15	7.0%	6	2.1%	2	0.0%	0	5.1%	2	2.4%	3	3.4%	3
Abergavenny Town Centre	2.8%	13	0.7%	1	3.7%	3	6.7%	5	2.0%	1	1.8%	2	2.7%	2
Abertillery Town Centre	1.9%	9	0.0%	0	0.0%	0	1.6%	1	2.0%	1	6.3%	8	0.0%	0
Blackwood Town Centre	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	3	0.0%	0
Brynmawr Town Centre	1.3%	6	0.0%	0	0.0%	0	8.1%	6	2.2%	1	0.0%	0	0.0%	0
Cardiff City Centre	17.5%	83	21.3%	18	19.4%	15	12.1%	9	14.6%	5	12.0%	14	24.5%	22
Cwmbran Town Centre	18.8%	90	13.4%	12	17.9%	14	20.6%	14	20.3%	7	29.9%	36	8.5%	8
Ebbw Vale Town Centre	5.4%	26	8.1%	7	6.4%	5	6.2%	4	9.7%	3	1.0%	1	5.7%	5
Merthyr Tydfil Town Centre	2.8%	13	0.7%	1	6.4%	5	0.8%	1	0.0%	0	0.5%	1	7.2%	7
Newport City Centre	3.5%	17	2.6%	2	6.4%	5	4.9%	3	4.4%	1	3.9%	5	0.0%	0
Tredegar Town Centre	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	2.1%	2
Blackwood Gate Retail Park, Blackwood Road, Blackwood (Home Bargains, Aldi, Pet Hut, Sports Direct)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Cwmbran Retail Park, Cwmbran Drive, Cwmbran (B&Q, Currys, Next, Dreams, Halfords)	2.1%	10	0.7%	1	1.4%	1	2.4%	2	8.6%	3	3.3%	4	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil (B&Q, Matalan, M&S, Boots, Next)	20.6%	98	24.2%	21	30.6%	23	18.8%	13	11.9%	4	10.2%	12	27.1%	25
Dowlais Top Retail Park, Merthyr Tydfil (Carpetright, B&M)	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0
Festival Park Factory Outlet Shopping Centre, Ebbw Vale (Sports Direct, Mountain Warehouse, Holland & Barrett, Claire's, The Works)	11.1%	53	13.8%	12	20.6%	16	5.7%	4	10.5%	3	6.1%	7	11.3%	10
Lakeside Retail Park, Nantyglo, Brynmawr (Asda, Halfords, Pets at Home, Home Bargains)	3.8%	18	4.7%	4	2.7%	2	8.9%	6	0.0%	0	3.0%	4	2.2%	2
Trago Mills, Swansea Road, Merthyr Tydfil	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0
Newport Retail Park (Spytty Retail Park), Spytty Road, Newport	1.9%	9	1.3%	1	2.2%	2	1.6%	1	2.0%	1	3.9%	5	0.0%	0
Internet / delivered	31.7%	151	29.6%	25	24.2%	18	29.8%	21	31.8%	10	29.4%	35	44.5%	41

Column %ges.

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Home catalogue	1.6%	8	0.7%	1	2.1%	2	0.8%	1	4.4%	1	2.4%	3	0.7%	1
TV / Interactive shopping	0.1%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Abroad	0.2%	1	0.0%	0	0.0%	0	0.0%	0	3.3%	1	0.0%	0	0.0%	0
Bridgend	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Bristol	0.4%	2	1.3%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cabot Circus, Bristol	0.9%	4	1.3%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	2.2%	2
Cardiff Gate Retail Park, Pontprennau, Cardiff	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Cardigan	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cribbs Causeway, Bristol	0.7%	4	1.3%	1	0.7%	1	0.8%	1	0.0%	0	0.0%	0	1.4%	1
Gloucester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Go Outdoors, Newport Road, Cardiff	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Haverfordwest	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Hereford	0.9%	4	0.0%	0	1.3%	1	0.8%	1	0.0%	0	1.5%	2	0.7%	1
Marks & Spencer, Culverhouse, Cardiff	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0
Monmouth	0.3%	2	0.0%	0	0.0%	0	0.8%	1	1.1%	0	0.0%	0	0.7%	1
Ross-on-Wye	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea	0.2%	1	0.0%	0	0.0%	0	0.8%	1	1.1%	0	0.0%	0	0.0%	0
(Don't know)	1.4%	6	4.7%	4	0.7%	1	0.8%	1	2.2%	1	0.5%	1	0.0%	0
(Nowhere else)	1.8%	9	5.6%	5	0.0%	0	4.8%	3	1.1%	0	0.0%	0	0.0%	0
Weighted base:		476		86		76		70		32		119		91
Sample:		473		77		73		76		60		106		81

Mean score: [%]

Q12 Overall, what percentage of your household's annual spend on clothing and footwear was spent via the internet before Covid-19?

None	33.9%	216	31.2%	37	27.6%	28	44.3%	42	44.7%	20	30.9%	43	33.2%	47
1 - 10%	9.8%	62	13.0%	15	11.1%	11	7.9%	7	10.4%	5	9.6%	13	7.3%	10
11 - 20%	7.3%	47	4.8%	6	4.9%	5	7.0%	7	6.1%	3	8.7%	12	10.3%	14
21 - 30%	4.9%	31	3.9%	5	4.8%	5	2.4%	2	1.6%	1	6.8%	9	6.8%	10
31 - 40%	3.8%	24	1.0%	1	6.0%	6	5.9%	6	6.0%	3	2.9%	4	3.3%	5
41 - 50%	9.5%	61	8.4%	10	14.8%	15	9.0%	8	3.8%	2	12.5%	17	6.0%	8
51 - 60%	2.9%	19	6.6%	8	2.7%	3	1.2%	1	3.2%	1	0.8%	1	3.3%	5
61 - 70%	2.7%	17	3.0%	4	2.7%	3	2.9%	3	0.0%	0	2.1%	3	3.8%	5
71 - 80%	6.3%	40	4.6%	5	8.8%	9	4.1%	4	3.7%	2	10.0%	14	4.3%	6
81 - 90%	4.8%	31	7.8%	9	4.4%	4	5.2%	5	3.8%	2	4.2%	6	3.2%	5
91 - 99%	1.8%	11	3.1%	4	0.0%	0	1.7%	2	2.4%	1	3.6%	5	0.0%	0
100%	8.7%	56	5.0%	6	9.4%	9	4.7%	4	12.7%	6	7.5%	10	13.9%	20
(Don't know / varies)	3.4%	21	7.5%	9	2.7%	3	3.7%	3	1.6%	1	0.4%	1	3.7%	5
Mean:		*34.35*		*34.99*		*37.62*		*27.53*		*30.61*		*36.18*		*35.41*
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120

Q13 Now thinking about other types of non-food shopping. When your household is shopping for personal care, medical and pharmaceutical goods and equipment, such as medicines, soap and toothpaste, make up, plasters and spectacles / contact lenses, where do you normally go? Please tell us about all the locations you use on a regular basis. [MR]

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Aldi, Monmouth Road, Abergavenny, NP7 5HF	0.4%	2	0.0%	0	0.6%	1	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Aldi, The Walk, Ebbw Vale, NP23 6AY	1.7%	11	1.5%	2	0.0%	0	2.9%	3	2.9%	1	3.3%	5	0.5%	1
Asda, Dowlais Top, Merthyr Tydfil	0.4%	3	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Asda, High Street, Blackwood	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	5	0.0%	0
Asda, Lakeside Retail Park, Nanytyglo, Brynmawr, NP23 4SL	10.2%	65	1.9%	2	8.1%	8	24.1%	23	32.9%	15	11.3%	16	0.9%	1
B&M Home Store, Dowlais Top Retail Park, Merthyr Tydfil	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
B&M Home Store, Rhyd-Y-Blew, Ebbw Vale, NP23 5YD	2.4%	15	4.0%	5	6.5%	7	1.1%	1	0.8%	0	2.0%	3	0.0%	0
Co-op, 53 High Street, Blaina, NP13 3XB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Costcutter, 28-30 Bailey Street, Brynmawr	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Farmfoods, Gwent Shopping Centre, Tredegar	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Heron Frozen Foods / B&M Express, 32 Bethcar Street, Ebbw Vale, NP23 6HQ	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Blackwood Gate Retail Park, Blackwood Road, Blackwood	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Home Bargains, Gwent Shopping Centre, Tredegar	1.5%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	10
Home Bargains, James Street, Ebbw Vale	2.7%	17	3.7%	4	8.0%	8	0.0%	0	1.5%	1	2.8%	4	0.0%	0
Home Bargains, Lakeside Retail Park, Brynmawr	4.3%	28	0.0%	0	0.6%	1	12.6%	12	5.4%	2	9.1%	13	0.0%	0
Lidl, Gelli Road, Tredegar	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	4
Lidl, Penygarnddu Industrial Estate, Merthyr Tydfil	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Morrisons, Azalea Road, Rogerstone, Newport, NP10 9HZ	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Morrisons, Beaufort Road, Ebbw Vale, NP23 5WS	6.0%	38	4.1%	5	15.4%	15	6.0%	6	0.8%	0	1.6%	2	6.8%	10
Tesco Extra, Beacons Place, Merthyr Tydfil, CF47 0AL	0.3%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Tesco Extra, Pontymister Industrial Estate, Risca, NP11 6NP	1.3%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	9	0.0%	0
Tesco, Castle Street, Abertillery, NP13 1UR	4.4%	28	0.0%	0	0.0%	0	1.2%	1	2.4%	1	18.7%	26	0.0%	0
Tesco, North West Approach, Ebbw Vale, NP23 6TS	7.4%	47	15.1%	18	14.5%	15	5.3%	5	0.8%	0	2.5%	3	4.3%	6
Waitrose, Merthyr Road, Abergavenny, NP7 9LL	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Abergavenny Town Centre	1.8%	11	2.1%	2	0.0%	0	1.8%	2	3.7%	2	2.1%	3	1.8%	2
Abertillery Town Centre	11.0%	70	0.0%	0	0.0%	0	0.0%	0	6.1%	3	48.1%	67	0.0%	0
Blackwood Town Centre	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	3	0.0%	0
Blaina Town Centre	4.3%	28	0.0%	0	0.0%	0	5.2%	5	49.3%	22	0.4%	1	0.0%	0
Brynmawr Town Centre	9.9%	63	0.0%	0	4.5%	5	55.6%	53	11.6%	5	0.4%	1	0.0%	0
Cardiff City Centre	1.4%	9	1.0%	1	0.0%	0	0.0%	0	0.0%	0	3.8%	5	1.9%	3
Cwmbran Town Centre	4.0%	26	3.6%	4	0.0%	0	2.2%	2	7.9%	4	11.3%	16	0.0%	0
Ebbw Vale Town Centre	28.2%	180	69.9%	82	69.1%	69	5.9%	6	4.5%	2	4.5%	6	10.4%	15
Merthyr Tydfil Town Centre	0.3%	2	0.0%	0	0.6%	1	0.0%	0	2.2%	1	0.0%	0	0.5%	1
Newport City Centre	0.6%	4	0.0%	0	1.0%	1	0.0%	0	0.8%	0	1.2%	2	0.5%	1
Tredegar Town Centre	16.0%	102	0.9%	1	1.0%	1	1.1%	1	0.0%	0	0.0%	0	70.4%	99
Blackwood Gate Retail Park, Blackwood Road, Blackwood (Home	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Bargains, Aldi, Pet Hut, Sports Direct)														
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil (B&Q, Matalan, M&S, Boots, Next)	5.7%	36	5.1%	6	7.6%	8	4.7%	4	5.4%	2	3.3%	5	8.0%	11
Dowlais Top Retail Park, Merthyr Tydfil (Carpetright, B&M)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Festival Park Factory Outlet Shopping Centre, Ebbw Vale (Sports Direct, Mountain Warehouse, Holland & Barrett, Claire's, The Works)	0.4%	2	1.6%	2	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Lakeside Retail Park, Nantyglo, Brynmawr (Asda, Halfords, Pets at Home, Home Bargains)	2.4%	15	1.6%	2	2.3%	2	4.7%	4	6.7%	3	2.8%	4	0.0%	0
Trago Mills, Swansea Road, Merthyr Tydfil	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newport Retail Park (Spytty Retail Park), Spytty Road, Newport	0.3%	2	0.5%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	10.8%	69	8.2%	10	12.5%	13	5.8%	6	9.4%	4	8.2%	11	17.9%	25
Beaufort	1.3%	8	0.5%	1	3.9%	4	1.7%	2	0.0%	0	0.0%	0	1.4%	2
Cwm	1.8%	11	9.6%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llanhilleth	1.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	7	0.0%	0
Nantyglo	0.3%	2	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Rassau	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rhymney	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Screwfix, Waun-Y-Pound Industrial Estate, Ebbw Vale	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swansea	0.3%	2	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't do this type of shopping)	2.4%	15	4.1%	5	0.6%	1	0.6%	1	0.0%	0	2.6%	4	4.2%	6
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120

Mean score: [%]

Q14 What percentage of your household's annual spend on medical and pharmaceutical goods and equipment was spent via the internet before Covid-19?
Not Don't know and not Don't do at Q13

None	84.8%	527	90.5%	102	83.2%	83	87.1%	82	88.4%	40	87.0%	118	76.5%	103
1 - 10%	4.4%	27	1.6%	2	4.9%	5	4.6%	4	1.6%	1	5.5%	7	6.2%	8
11 - 20%	2.0%	13	2.2%	2	2.0%	2	3.7%	3	2.4%	1	1.7%	2	0.9%	1
21 - 30%	0.7%	5	0.0%	0	2.7%	3	0.0%	0	0.0%	0	0.0%	0	1.4%	2
31 - 40%	0.9%	5	0.0%	0	1.7%	2	0.6%	1	0.0%	0	0.8%	1	1.5%	2
41 - 50%	1.8%	11	1.5%	2	1.0%	1	2.3%	2	1.4%	1	1.6%	2	2.4%	3
51 - 60%	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
61 - 70%	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
71 - 80%	0.7%	4	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2
81 - 90%	0.5%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	2
91 - 99%	0.3%	2	0.0%	0	0.0%	0	1.1%	1	1.4%	1	0.0%	0	0.0%	0
100%	3.2%	20	1.6%	2	3.4%	3	0.6%	1	4.8%	2	2.1%	3	6.8%	9
(Don't know / varies)	0.4%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Mean:		*6.85*		*4.29*		*7.11*		*4.23*		*7.41*		*4.83*		*12.51*
Weighted base:		621		112		99		94		45		136		135
Sample:		624		106		99		100		80		123		116

Q15 When your household is shopping for recreational goods such as toys, games, sports and recreational equipment and items related to your hobbies, where do you normally go? Please tell us about all the locations you use on a regular basis. [MR]

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Asda, Dowlais Top, Merthyr Tydfil	0.6%	4	0.0%	0	2.7%	3	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Asda, Lakeside Retail Park, Nanytyglo, Brynmawr, NP23 4SL	2.5%	16	0.0%	0	3.4%	3	5.9%	6	9.4%	4	2.1%	3	0.0%	0
B&M Home Store, Rhyd-Y-Blew, Ebbw Vale, NP23 5YD	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Home Bargains, Lakeside Retail Park, Brynmawr	0.3%	2	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.4%	1	0.0%	0
Marks & Spencer, Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Morrisons, Beaufort Road, Ebbw Vale, NP23 5WS	0.7%	5	0.0%	0	2.7%	3	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Tesco Extra, Beacons Place, Merthyr Tydfil, CF47 0AL	0.3%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Tesco Extra, Pontymister Industrial Estate, Risca, NP11 6NP	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.4%	1	1.2%	2	0.0%	0
Tesco, Castle Street, Abertillery, NP13 1UR	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Tesco, North West Approach, Ebbw Vale, NP23 6TS	0.9%	5	1.0%	1	0.0%	0	0.0%	0	1.4%	1	0.8%	1	1.8%	3
Abergavenny Town Centre	0.6%	4	0.0%	0	0.6%	1	0.6%	1	2.3%	1	0.0%	0	1.3%	2
Abertillery Town Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Blackwood Town Centre	0.7%	5	0.5%	1	0.0%	0	0.0%	0	0.0%	0	3.0%	4	0.0%	0
Brynmawr Town Centre	0.4%	3	0.0%	0	0.0%	0	1.8%	2	2.4%	1	0.0%	0	0.0%	0
Caerphilly Town Centre	0.2%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	6.0%	38	3.4%	4	9.2%	9	3.4%	3	14.4%	6	3.7%	5	7.1%	10
Cwmbran Town Centre	7.1%	45	4.3%	5	1.6%	2	4.0%	4	11.0%	5	20.3%	28	0.9%	1
Ebbw Vale Town Centre	9.5%	61	20.2%	24	13.3%	13	4.8%	5	7.2%	3	5.0%	7	6.4%	9
Merthyr Tydfil Town Centre	0.8%	5	0.9%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	2.2%	3
Newport City Centre	1.1%	7	0.0%	0	1.7%	2	0.0%	0	3.9%	2	2.6%	4	0.0%	0
Tredegar Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Blackwood Gate Retail Park, Blackwood Road, Blackwood (Home Bargains, Aldi, Pet Hut, Sports Direct)	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	3	0.0%	0
Cwmbran Retail Park, Cwmbran Drive, Cwmbran (B&Q, Currys, Next, Dreams, Halfords)	0.6%	4	0.5%	1	0.0%	0	0.0%	0	3.8%	2	1.2%	2	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil (B&Q, Matalan, M&S, Boots, Next)	7.2%	46	4.0%	5	12.0%	12	8.2%	8	1.6%	1	3.3%	5	11.4%	16
Dowlais Top Retail Park, Merthyr Tydfil (Carpetright, B&M)	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Festival Park Factory Outlet Shopping Centre, Ebbw Vale (Sports Direct, Mountain Warehouse, Holland & Barrett, Claire's, The Works)	7.6%	48	7.6%	9	13.7%	14	3.6%	3	0.8%	0	8.2%	11	7.4%	10
Lakeside Retail Park, Nantyglo, Brynmawr (Asda, Halfords, Pets at Home, Home Bargains)	1.5%	9	0.0%	0	1.7%	2	1.1%	1	5.4%	2	3.0%	4	0.0%	0
Trago Mills, Swansea Road, Merthyr Tydfil	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Newport Retail Park (Spytty Retail Park), Spytty Road, Newport	2.2%	14	4.6%	5	0.0%	0	0.0%	0	0.0%	0	6.3%	9	0.0%	0
Internet / delivered	38.6%	246	35.3%	41	39.7%	40	37.9%	36	30.1%	13	41.9%	59	40.5%	57
Home catalogue	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.8%	0	0.0%	0	0.0%	0
B&M Home Store, Rassau, Ebbw Vale	0.3%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Brecon	0.4%	2	0.0%	0	0.0%	0	0.6%	1	0.0%	0	1.3%	2	0.0%	0
Bridgend	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Captial Shopping Park, Cardiff	0.2%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardigan	0.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maesglas Retail Park	0.9%	5	0.0%	0	4.4%	4	0.0%	0	2.2%	1	0.0%	0	0.0%	0
Mendalgief Retail Park, Newport NP20 2NY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Newbridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Pentrebach Retail Park, Pentrebach	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stratford-upon-Avon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Swansea	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Walk Retail Centre, Ebbw Vale	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know)	0.6%	4	1.9%	2	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.9%	1
(Don't do this type of shopping)	37.9%	241	37.2%	44	33.3%	33	46.0%	44	41.4%	19	30.9%	43	42.2%	59
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120

Mean score: [%]

Q16 What percentage of your household's annual spend on recreational goods such as toys, games, sports and recreational equipment and items related to your hobbies was spent via the internet before Covid-19?
Not Don't know and not Don't do at Q15

None	29.5%	115	33.2%	24	24.3%	16	24.7%	12	40.0%	10	35.8%	35	22.5%	18
1 - 10%	4.8%	19	4.1%	3	5.7%	4	4.5%	2	3.8%	1	3.6%	3	6.5%	5
11 - 20%	3.1%	12	0.0%	0	4.0%	3	2.2%	1	13.1%	3	1.7%	2	3.9%	3
21 - 30%	3.6%	14	7.2%	5	4.6%	3	2.1%	1	2.4%	1	3.6%	3	0.8%	1
31 - 40%	1.3%	5	0.0%	0	1.5%	1	0.0%	0	0.0%	0	1.8%	2	3.1%	2
41 - 50%	8.7%	34	6.6%	5	16.6%	11	7.8%	4	5.0%	1	7.4%	7	7.5%	6
51 - 60%	2.0%	8	2.6%	2	0.8%	1	2.1%	1	0.0%	0	3.7%	4	0.8%	1
61 - 70%	3.0%	12	3.1%	2	4.6%	3	5.6%	3	4.1%	1	2.5%	2	0.0%	0
71 - 80%	5.8%	23	6.7%	5	6.4%	4	2.2%	1	3.9%	1	3.7%	4	10.0%	8
81 - 90%	5.0%	19	4.2%	3	4.1%	3	4.2%	2	2.5%	1	8.0%	8	4.1%	3
91 - 99%	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
100%	32.5%	127	29.8%	21	27.3%	18	43.6%	22	25.2%	7	27.2%	26	40.8%	33
(Don't know / varies)	0.9%	3	2.6%	2	0.0%	0	1.2%	1	0.0%	0	1.1%	1	0.0%	0
Mean:		*52.09*		*49.53*		*50.93*		*60.36*		*39.54*		*47.70*		*59.46*
Weighted base:		392		71		67		51		26		97		80
Sample:		352		60		56		49		42		81		64

Q17 When your household is shopping for audio-visual goods such as televisions, cameras, computers and recording and recorded material (such as CDs and DVDs), where do you normally go? Please tell us about all the locations you use on a regular basis. [MR]

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Aldi, Blackwood Gate Retail Park, Blackwood, NP12 2FS	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, The Walk, Ebbw Vale, NP23 6AY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Asda, Dowlais Top, Merthyr Tydfil	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Asda, Lakeside Retail Park, Nanytyglo, Brynmawr, NP23 4SL	3.5%	23	0.5%	1	4.4%	4	11.1%	10	9.3%	4	2.1%	3	0.0%	0
B&Q, Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Curry PC World, Unit 5A, Cwmbran Retail Park, Cwmbran, NP44 3JQ	4.3%	27	1.0%	1	0.0%	0	3.0%	3	0.0%	0	16.7%	23	0.0%	0
Currys / PC World, Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	12.8%	81	7.9%	9	18.1%	18	16.1%	15	11.4%	5	7.0%	10	17.0%	24
Morrisons, Beaufort Road, Ebbw Vale, NP23 5WS	0.6%	4	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0	1.4%	2
Tesco Extra, Beacons Place, Merthyr Tydfil, CF47 0AL	0.6%	4	0.0%	0	2.7%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Tesco Extra, Pontymister Industrial Estate, Risca, NP11 6NP	1.1%	7	0.0%	0	0.0%	0	0.0%	0	1.5%	1	4.6%	6	0.0%	0
Tesco, Castle Street, Abertillery, NP13 1UR	0.5%	3	0.0%	0	0.0%	0	0.0%	0	2.4%	1	1.6%	2	0.0%	0
Tesco, New Road, Hengoed, Merthyr Tydfil, CF82 7DP	0.3%	2	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.5%	1
Tesco, North West Approach, Ebbw Vale, NP23 6TS	2.2%	14	2.0%	2	2.1%	2	4.4%	4	0.0%	0	1.3%	2	2.8%	4
Abergavenny Town Centre	0.4%	2	0.0%	0	0.0%	0	1.9%	2	1.6%	1	0.0%	0	0.0%	0
Abertillery Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Blackwood Town Centre	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	1.4%	2
Cardiff City Centre	1.4%	9	1.9%	2	1.1%	1	0.0%	0	3.2%	1	1.2%	2	1.9%	3
Cwmbran Town Centre	2.5%	16	0.0%	0	1.0%	1	1.9%	2	5.6%	2	7.4%	10	0.0%	0
Ebbw Vale Town Centre	12.7%	81	18.6%	22	18.6%	19	13.7%	13	6.9%	3	7.4%	10	10.3%	14
Merthyr Tydfil Town Centre	0.6%	4	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Newport City Centre	0.6%	4	0.0%	0	0.0%	0	2.5%	2	0.0%	0	1.3%	2	0.0%	0
Tredegar Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Blackwood Gate Retail Park, Blackwood Road, Blackwood (Home Bargains, Aldi, Pet Hut, Sports Direct)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Cwmbran Retail Park, Cwmbran Drive, Cwmbran (B&Q, Currys, Next, Dreams, Halfords)	5.4%	34	0.0%	0	1.7%	2	3.5%	3	5.3%	2	19.1%	27	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil (B&Q, Matalan, M&S, Boots, Next)	25.0%	160	30.2%	35	31.0%	31	25.1%	24	26.3%	12	13.2%	18	27.8%	39
Festival Park Factory Outlet Shopping Centre, Ebbw Vale (Sports Direct, Mountain Warehouse, Holland & Barrett, Claire's, The Works)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	3.2%	1	0.0%	0	0.0%	0
Lakeside Retail Park, Nantyglo, Brynmawr (Asda, Halfords, Pets at Home, Home Bargains)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0
Newport Retail Park (Spytty Retail Park), Spytty Road, Newport	1.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	7	0.0%	0
Internet / delivered	42.6%	271	36.8%	43	43.6%	44	32.9%	31	33.4%	15	57.2%	80	41.7%	59
Home catalogue	0.6%	4	0.9%	1	0.0%	0	1.1%	1	0.8%	0	0.8%	1	0.0%	0

Column %ges.

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
TV / Interactive shopping	0.6%	4	1.6%	2	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Argos, The Walk Retail Park, Ebbw Vale	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
CostCo, Capital Retail Park, Cardiff	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Rassau	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Talbot Green Shopping Park, Pontyclun	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Tesco Extra, Harlech Retail Park, Newport	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
The Walk Retail Centre, Ebbw Vale	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Troy Electrical, Ebbw Vale	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	0.8%	5	0.0%	0	3.4%	3	0.0%	0	1.6%	1	0.8%	1	0.0%	0
(Don't do this type of shopping)	14.2%	91	25.3%	30	4.9%	5	17.6%	17	10.0%	4	8.0%	11	16.8%	24
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120

Mean score: [%]

Q18 What percentage of your household's annual spend on audio-visual goods such as televisions, cameras, computers and recording and recorded material (such as CDs and DVDs) was spent via the internet before Covid-19?
Not Don't know and not Don't do at Q17

None	45.9%	248	41.4%	36	48.8%	45	55.0%	43	60.4%	24	36.4%	46	46.5%	54
1 - 10%	3.3%	18	1.3%	1	2.3%	2	5.3%	4	0.9%	0	5.4%	7	2.8%	3
11 - 20%	3.2%	17	1.3%	1	4.3%	4	5.6%	4	3.6%	1	0.8%	1	4.6%	5
21 - 30%	1.5%	8	2.6%	2	0.0%	0	0.0%	0	0.0%	0	1.9%	2	2.8%	3
31 - 40%	1.1%	6	0.0%	0	1.9%	2	0.0%	0	1.6%	1	1.3%	2	1.7%	2
41 - 50%	8.7%	47	14.4%	13	7.2%	7	5.0%	4	4.5%	2	13.2%	17	4.4%	5
51 - 60%	1.5%	8	0.0%	0	1.1%	1	2.1%	2	0.0%	0	0.5%	1	4.1%	5
61 - 70%	2.3%	13	2.1%	2	5.5%	5	1.4%	1	0.0%	0	2.2%	3	1.7%	2
71 - 80%	3.6%	19	9.7%	8	3.0%	3	1.4%	1	1.6%	1	3.7%	5	1.6%	2
81 - 90%	2.1%	12	2.1%	2	3.7%	3	3.6%	3	0.0%	0	2.7%	3	0.0%	0
91 - 99%	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
100%	26.3%	142	23.8%	21	22.4%	21	20.7%	16	26.4%	10	31.1%	40	29.8%	35
(Don't know / varies)	0.5%	3	1.3%	1	0.0%	0	0.0%	0	0.9%	0	0.8%	1	0.0%	0
Mean:		*39.88*		*43.75*		*37.81*		*31.30*		*31.55*		*46.94*		*39.51*
Weighted base:		541		87		92		78		40		127		117
Sample:		529		79		88		82		69		111		100

Q19 When your household is shopping for furniture, carpets and floor coverings, where do you normally go? Please tell us about all the locations you use on a regular basis. [MR]

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
B&Q, Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	1.8%	11	0.0%	0	2.7%	3	2.9%	3	0.0%	0	0.4%	1	3.8%	5
B&Q, Unit 1, Lockgate Retail Park, Cwmbran	0.3%	2	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.4%	1	0.0%	0
Ikea, Ferry Road, Cardiff	3.3%	21	4.0%	5	2.7%	3	2.2%	2	9.1%	4	3.7%	5	1.4%	2
Next, Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Next, Unit 4B, Cwmbran Retail Park, Cwmbran	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Abergavenny Town Centre	1.1%	7	1.0%	1	1.7%	2	1.7%	2	0.8%	0	1.6%	2	0.0%	0
Abertillery Town Centre	5.5%	35	0.0%	0	0.0%	0	2.3%	2	10.8%	5	20.1%	28	0.0%	0
Blackwood Town Centre	0.9%	6	0.0%	0	0.0%	0	0.6%	1	0.0%	0	3.6%	5	0.0%	0
Blaina Town Centre	1.1%	7	0.0%	0	1.7%	2	2.9%	3	5.4%	2	0.0%	0	0.0%	0
Brynmawr Town Centre	4.3%	27	2.5%	3	6.5%	7	11.7%	11	7.0%	3	1.6%	2	0.9%	1
Cardiff City Centre	6.1%	39	5.9%	7	5.6%	6	4.1%	4	7.5%	3	6.2%	9	7.5%	10
Cwmbran Town Centre	3.0%	19	3.3%	4	2.1%	2	0.0%	0	2.2%	1	8.6%	12	0.0%	0
Ebbw Vale Town Centre	14.6%	93	25.9%	30	26.2%	26	9.5%	9	5.4%	2	7.4%	10	10.6%	15
Merthyr Tydfil Town Centre	2.7%	17	4.8%	6	3.3%	3	1.8%	2	0.0%	0	1.3%	2	3.2%	4
Newport City Centre	0.9%	6	1.9%	2	0.0%	0	0.0%	0	0.8%	0	1.7%	2	0.5%	1
Tredegar Town Centre	6.3%	40	1.5%	2	6.1%	6	1.2%	1	0.0%	0	0.0%	0	22.0%	31
Blackwood Gate Retail Park, Blackwood Road, Blackwood (Home Bargains, Aldi, Pet Hut, Sports Direct)	0.4%	2	0.0%	0	0.0%	0	0.6%	1	0.0%	0	1.3%	2	0.0%	0
Cwmbran Retail Park, Cwmbran Drive, Cwmbran (B&Q, Currys, Next, Dreams, Halfords)	2.8%	18	1.9%	2	0.0%	0	3.5%	3	3.7%	2	7.5%	11	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil (B&Q, Matalan, M&S, Boots, Next)	8.2%	52	7.7%	9	6.5%	6	11.8%	11	8.0%	4	4.9%	7	10.7%	15
Dowlais Top Retail Park, Merthyr Tydfil (Carpetright, B&M)	3.1%	20	3.5%	4	5.9%	6	3.4%	3	3.8%	2	0.0%	0	3.3%	5
Festival Park Factory Outlet Shopping Centre, Ebbw Vale (Sports Direct, Mountain Warehouse, Holland & Barrett, Claire's, The Works)	0.6%	4	0.0%	0	1.0%	1	0.0%	0	1.5%	1	0.0%	0	1.4%	2
Lakeside Retail Park, Nantyglo, Brynmawr (Asda, Halfords, Pets at Home, Home Bargains)	0.7%	4	0.0%	0	1.0%	1	1.8%	2	0.8%	0	0.8%	1	0.0%	0
Trago Mills, Swansea Road, Merthyr Tydfil	1.4%	9	1.0%	1	0.6%	1	3.7%	4	0.8%	0	0.4%	1	1.8%	3
Newport Retail Park (Spytty Retail Park), Spytty Road, Newport	2.6%	16	4.5%	5	1.6%	2	2.9%	3	5.4%	2	2.6%	4	0.5%	1
Internet / delivered	21.8%	139	14.0%	16	30.9%	31	15.2%	14	18.3%	8	35.1%	49	14.4%	20
Home catalogue	0.7%	4	0.9%	1	0.0%	0	1.7%	2	1.4%	1	0.8%	1	0.0%	0
Beaufort	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Brecon	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Bridgend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Bristol	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Cabot Circus, Bristol	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Cardiff Gate Retail Park, Pontprennau, Cardiff	5.4%	34	2.4%	3	5.0%	5	5.4%	5	2.9%	1	8.8%	12	5.5%	8
Cribbs Causeway, Bristol	0.2%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crickhowell	0.4%	2	0.0%	0	1.0%	1	0.0%	0	1.5%	1	0.0%	0	0.5%	1
Cwm	0.6%	4	0.0%	0	0.0%	0	0.0%	0	1.4%	1	2.0%	3	0.5%	1
DFS, Hereford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Doleq Carpets, Noble Square Industrial Estate, Brynmawr	2.9%	18	2.8%	3	7.0%	7	5.9%	6	3.2%	1	0.8%	1	0.0%	0
Dunelm, City Link Retail Park, Cardiff	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Dunelm, Pontypridd	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Retail Park, Newport	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.8%	1	0.0%	0
Hereford	0.2%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Ikea, Eastgate Shopping Centre Eastgate Road, Bristol	0.3%	2	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Llanhilleth	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Llantrisant	0.4%	3	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Maesglas Retail Park	0.6%	4	2.4%	3	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Malpas	0.3%	2	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Culverhouse, Cardiff	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.9%	1
Newbridge	0.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Noble Square Industrial Estate, Brynmawr	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pontypool	0.3%	2	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Swansea	0.3%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
The Walk Retail Centre, Ebbw Vale	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Travis Perkins, Polo Grounds Industrial Estate, Pontypool	0.3%	2	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ystrad Mynach	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know)	3.6%	23	7.0%	8	0.0%	0	4.8%	5	2.4%	1	0.8%	1	5.6%	8
(Don't do this type of shopping)	22.6%	144	29.3%	34	15.1%	15	25.8%	24	23.6%	11	12.6%	18	29.9%	42
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120

Mean score: [%]

Q20 What percentage of your household's annual spend on furniture, carpets and floor coverings was spent via the internet before Covid-19?
Not Don't know and not Don't do at Q19

None	66.9%	314	73.9%	55	62.5%	53	74.1%	49	71.4%	24	58.0%	70	70.2%	64
1 - 10%	2.4%	11	3.0%	2	3.6%	3	1.6%	1	5.0%	2	0.9%	1	2.2%	2
11 - 20%	3.2%	15	1.6%	1	6.0%	5	2.6%	2	3.2%	1	1.5%	2	4.5%	4
21 - 30%	1.5%	7	0.0%	0	1.2%	1	3.3%	2	3.9%	1	2.0%	2	0.0%	0
31 - 40%	0.9%	4	0.8%	1	0.0%	0	1.6%	1	0.0%	0	0.5%	1	2.2%	2
41 - 50%	3.0%	14	1.5%	1	4.0%	3	2.5%	2	0.0%	0	4.7%	6	2.2%	2
51 - 60%	0.4%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
61 - 70%	1.7%	8	0.0%	0	2.4%	2	0.0%	0	0.0%	0	4.4%	5	0.7%	1
71 - 80%	3.2%	15	4.0%	3	0.0%	0	1.6%	1	0.0%	0	4.4%	5	6.3%	6
81 - 90%	0.5%	2	0.0%	0	0.0%	0	0.0%	0	1.9%	1	1.5%	2	0.0%	0
91 - 99%	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
100%	15.3%	72	11.2%	8	18.3%	16	9.5%	6	14.5%	5	22.1%	27	11.5%	10
(Don't know / varies)	1.1%	5	4.1%	3	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0
Mean:		*23.13*		*16.65*		*25.09*		*14.74*		*18.49*		*33.54*		*20.13*
Weighted base:		470		75		85		66		33		121		91
Sample:		459		71		81		70		55		105		77

Q21 When your household is shopping for items for the house including household textiles, tableware, glassware and non-electrical household utensils such as saucepans and cutlery, where do you normally go? Please tell us about all the locations you use on a regular basis. [MR]

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Aldi, Monmouth Road, Abergavenny, NP7 5HF	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Aldi, Plymouth Street, Merthyr Tydfil, CF47 0TP	0.3%	2	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, The Walk, Ebbw Vale, NP23 6AY	0.2%	2	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Dowlais Top, Merthyr Tydfil	2.3%	15	0.5%	1	1.0%	1	0.6%	1	0.8%	0	0.0%	0	8.6%	12
Asda, Lakeside Retail Park, Nanytyglo, Brynmawr, NP23 4SL	9.6%	61	2.5%	3	13.5%	14	26.2%	25	16.9%	8	9.0%	13	0.0%	0
B&M Home Store, Dowlais Top Retail Park, Merthyr Tydfil	0.6%	4	0.9%	1	1.0%	1	0.0%	0	2.4%	1	0.0%	0	0.5%	1
B&M Home Store, Rhyd-Y-Blew, Ebbw Vale, NP23 5YD	7.4%	47	5.4%	6	12.1%	12	1.1%	1	3.8%	2	9.2%	13	9.5%	13
Currys / PC World, Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	0.4%	3	0.0%	0	1.0%	1	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Gwent Shopping Centre, Tredegar	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	4
Home Bargains, James Street, Ebbw Vale	0.8%	5	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.8%	4	0.0%	0
Home Bargains, Lakeside Retail Park, Brynmawr	0.8%	5	0.0%	0	0.0%	0	1.7%	2	1.5%	1	2.0%	3	0.0%	0
Ikea, Ferry Road, Cardiff	2.5%	16	2.5%	3	2.3%	2	0.6%	1	8.6%	4	2.6%	4	1.9%	3
Marks & Spencer, Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	0.2%	2	0.0%	0	0.6%	1	0.0%	0	0.8%	0	0.4%	1	0.0%	0
Morrisons, Azalea Road, Rogerstone, Newport, NP10 9HZ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Morrisons, Beaufort Road, Ebbw Vale, NP23 5WS	3.2%	21	4.6%	5	7.0%	7	1.8%	2	0.0%	0	0.0%	0	4.7%	7
Next, Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	1.0%	6	0.0%	0	1.0%	1	4.1%	4	0.0%	0	0.0%	0	0.9%	1
Next, Unit 4B, Cwmbran Retail Park, Cwmbran	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Peacocks, Unit 1, Market Street, Ebbw Vale, NP23 6HP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Sainsbury's, Newbridge Road Industrial Estate, Blackwood	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Tesco Extra, Beacons Place, Merthyr Tydfil, CF47 0AL	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Pontymister Industrial Estate, Risca, NP11 6NP	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	4	0.0%	0
Tesco, Castle Street, Abertillery, NP13 1UR	1.2%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	7	0.0%	0
Tesco, New Road, Hengoed, Merthyr Tydfil, CF82 7DP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Tesco, North West Approach, Ebbw Vale, NP23 6TS	5.6%	36	8.4%	10	6.3%	6	4.8%	5	1.4%	1	2.0%	3	8.3%	12
Waitrose, Merthyr Road, Abergavenny, NP7 9LL	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Abergavenny Town Centre	1.1%	7	0.0%	0	0.6%	1	2.5%	2	3.8%	2	0.0%	0	1.7%	2
Abertillery Town Centre	1.0%	6	0.0%	0	0.0%	0	0.0%	0	1.4%	1	4.1%	6	0.0%	0
Blackwood Town Centre	1.4%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	9	0.0%	0
Brynmawr Town Centre	0.4%	3	0.0%	0	0.0%	0	2.4%	2	0.8%	0	0.0%	0	0.0%	0
Cardiff City Centre	4.6%	29	2.5%	3	4.4%	4	2.4%	2	0.0%	0	7.6%	11	6.5%	9
Cwmbran Town Centre	4.7%	30	3.0%	4	0.6%	1	3.7%	4	7.1%	3	13.9%	19	0.0%	0
Ebbw Vale Town Centre	8.7%	56	18.9%	22	13.1%	13	5.5%	5	6.1%	3	3.7%	5	5.1%	7
Merthyr Tydfil Town Centre	2.6%	17	2.0%	2	3.3%	3	2.5%	2	3.8%	2	0.0%	0	5.1%	7
Newport City Centre	1.0%	6	1.0%	1	0.0%	0	0.0%	0	5.4%	2	2.0%	3	0.0%	0

Column %ges.

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Tredegar Town Centre	1.5%	9	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	6.3%	9
Blackwood Gate Retail Park, Blackwood Road, Blackwood (Home Bargains, Aldi, Pet Hut, Sports Direct)	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Cwmbran Retail Park, Cwmbran Drive, Cwmbran (B&Q, Currys, Next, Dreams, Halfords)	3.1%	20	1.5%	2	0.0%	0	0.6%	1	5.3%	2	10.6%	15	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil (B&Q, Matalan, M&S, Boots, Next)	11.8%	75	9.7%	11	14.0%	14	13.7%	13	6.1%	3	3.8%	5	20.3%	28
Festival Park Factory Outlet Shopping Centre, Ebbw Vale (Sports Direct, Mountain Warehouse, Holland & Barrett, Claire's, The Works)	5.8%	37	4.0%	5	11.2%	11	6.6%	6	5.3%	2	4.1%	6	4.6%	7
Lakeside Retail Park, Nantyglo, Brynmawr (Asda, Halfords, Pets at Home, Home Bargains)	1.9%	12	0.9%	1	0.0%	0	2.9%	3	0.8%	0	4.3%	6	1.4%	2
Trago Mills, Swansea Road, Merthyr Tydfil	0.7%	4	1.6%	2	0.0%	0	1.9%	2	0.0%	0	0.4%	1	0.0%	0
Newport Retail Park (Spytty Retail Park), Spytty Road, Newport	5.0%	32	5.1%	6	4.5%	5	2.4%	2	4.3%	2	9.2%	13	3.2%	4
Internet / delivered	32.5%	207	27.2%	32	33.8%	34	26.4%	25	32.0%	14	36.6%	51	36.2%	51
Home catalogue	1.3%	8	0.9%	1	0.6%	1	1.8%	2	3.9%	2	0.8%	1	1.4%	2
B&M Home Store, Rassau, Ebbw Vale	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birmingham	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff Gate Retail Park, Pontprennau, Cardiff	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0
CostCo, Capital Retail Park, Cardiff	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
DFS, Hereford	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Dunelm, City Link Retail Park, Cardiff	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.8%	1	0.0%	0
Dunelm, Newport	1.4%	9	0.9%	1	0.0%	0	4.0%	4	3.1%	1	2.0%	3	0.0%	0
Dunelm, Pontypridd	0.9%	5	0.0%	0	1.0%	1	0.0%	0	1.4%	1	0.8%	1	1.9%	3
Dunelm, Swansea	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.5%	1
East Retail Park, Newport	0.6%	4	0.0%	0	1.0%	1	2.3%	2	0.8%	0	0.0%	0	0.0%	0
Ikea, Eastgate Shopping Centre Eastgate Road, Bristol	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Llantrisant	0.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maesglas Retail Park	0.5%	3	0.5%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	3	0.0%	0
Marks & Spencer, Culverhouse, Cardiff	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Screwfix, Waun-Y-Pound Industrial Estate, Ebbw Vale	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Walk Retail Centre, Ebbw Vale	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Troy Electrical, Ebbw Vale	0.3%	2	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0
(Don't know)	2.3%	15	3.9%	5	1.7%	2	2.9%	3	0.0%	0	0.8%	1	3.2%	5
(Don't do this type of shopping)	14.8%	94	22.4%	26	8.7%	9	17.1%	16	15.3%	7	7.4%	10	18.4%	26
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120

Column %ges.

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Mean score: [%]														
Q22 What percentage of your household's annual spend on items for the house including household textiles, tableware, glassware and non-electrical household utensils such as saucepans and cutlery was spent via the internet before Covid-19? *Not Don't know and not Don't do at Q21*														
None	53.5%	282	59.2%	51	56.1%	50	54.8%	41	58.6%	22	53.2%	68	44.3%	49
1 - 10%	5.4%	29	2.7%	2	4.8%	4	7.2%	5	7.9%	3	4.9%	6	6.7%	7
11 - 20%	3.7%	19	0.7%	1	4.8%	4	7.5%	6	1.9%	1	2.7%	3	4.1%	5
21 - 30%	3.9%	21	0.0%	0	3.1%	3	3.7%	3	6.6%	2	2.7%	3	8.3%	9
31 - 40%	1.7%	9	0.0%	0	0.0%	0	0.0%	0	0.9%	0	5.1%	7	1.8%	2
41 - 50%	10.5%	55	14.6%	13	8.0%	7	8.9%	7	5.7%	2	10.2%	13	12.5%	14
51 - 60%	1.6%	8	0.0%	0	0.0%	0	1.4%	1	1.7%	1	3.1%	4	2.5%	3
61 - 70%	1.2%	6	2.1%	2	1.9%	2	3.7%	3	0.0%	0	0.0%	0	0.0%	0
71 - 80%	2.5%	13	0.0%	0	1.8%	2	1.4%	1	1.7%	1	2.7%	3	5.6%	6
81 - 90%	1.9%	10	2.1%	2	1.9%	2	2.3%	2	2.8%	1	1.4%	2	1.8%	2
91 - 99%	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
100%	13.5%	71	17.2%	15	17.8%	16	8.8%	7	12.1%	5	13.2%	17	11.3%	12
(Don't know / varies)	0.7%	3	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.1%	1
Mean:		*27.32*		*28.61*		*28.34*		*23.03*		*23.13*		*27.25*		*30.02*
Weighted base:		528		86		90		76		38		128		110
Sample:		511		77		86		76		68		112		92

Q23 When your household is shopping for items for personal use such as jewellery, watches, travel and baby goods, where do you normally go? Please tell us about all the locations you use on a regular basis. [MR]

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Aldi, Plymouth Street, Merthyr Tydfil, CF47 0TP	0.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Dowlais Top, Merthyr Tydfil	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Asda, Lakeside Retail Park, Nanytyglo, Brynmawr, NP23 4SL	0.5%	3	1.0%	1	0.0%	0	1.9%	2	0.8%	0	0.0%	0	0.0%	0
Morrisons, Beaufort Road, Ebbw Vale, NP23 5WS	0.6%	4	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Next, Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Tesco, North West Approach, Ebbw Vale, NP23 6TS	0.6%	4	0.5%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Abergavenny Town Centre	3.4%	22	0.5%	1	6.0%	6	5.5%	5	3.7%	2	2.5%	3	3.2%	5
Abertillery Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Blackwood Town Centre	1.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	7	0.0%	0
Brynmawr Town Centre	3.5%	23	0.0%	0	0.0%	0	19.8%	19	6.0%	3	0.8%	1	0.0%	0
Cardiff City Centre	11.2%	71	10.6%	12	15.2%	15	5.2%	5	10.4%	5	10.8%	15	13.5%	19
Cwmbran Town Centre	10.7%	68	4.8%	6	5.5%	5	10.7%	10	11.5%	5	29.8%	42	0.0%	0
Ebbw Vale Town Centre	11.7%	75	19.0%	22	24.6%	25	7.9%	7	5.5%	2	4.4%	6	8.3%	12
Merthyr Tydfil Town Centre	4.1%	26	1.9%	2	5.4%	5	4.0%	4	1.6%	1	0.0%	0	10.1%	14
Newport City Centre	1.1%	7	1.9%	2	0.0%	0	0.6%	1	0.8%	0	2.8%	4	0.0%	0
Tredegar Town Centre	5.1%	33	2.4%	3	2.6%	3	0.0%	0	2.4%	1	0.0%	0	18.7%	26
Cwmbran Retail Park, Cwmbran Drive, Cwmbran (B&Q, Currys, Next, Dreams, Halfords)	1.1%	7	0.0%	0	0.6%	1	0.0%	0	0.0%	0	4.5%	6	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil (B&Q, Matalan, M&S, Boots, Next)	4.3%	27	3.6%	4	5.5%	5	1.9%	2	0.0%	0	4.1%	6	7.3%	10
Festival Park Factory Outlet Shopping Centre, Ebbw Vale (Sports Direct, Mountain Warehouse, Holland & Barrett, Claire's, The Works)	1.2%	8	1.0%	1	2.6%	3	0.6%	1	0.0%	0	0.0%	0	2.3%	3
Internet / delivered	25.0%	159	25.1%	29	34.9%	35	19.8%	19	23.8%	11	29.1%	41	17.8%	25
Home catalogue	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	3	0.9%	1
TV / Interactive shopping	0.8%	5	1.0%	1	0.0%	0	0.6%	1	3.2%	1	0.4%	1	0.9%	1
Abroad	0.8%	5	0.0%	0	2.3%	2	1.8%	2	1.6%	1	0.4%	1	0.0%	0
Bristol	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Doleq Carpets, Noble Square Industrial Estate, Brynmawr	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Hereford	0.3%	2	1.0%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
McArthurGlen Designer Outlet, Bridgend	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Swansea	0.3%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Ystrad Mynach	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know)	1.1%	7	2.0%	2	0.0%	0	3.0%	3	0.0%	0	0.0%	0	1.4%	2
(Don't do this type of shopping)	35.5%	226	37.3%	44	26.9%	27	38.5%	36	45.1%	20	32.6%	46	37.8%	53
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Mean score: [%]														
Q24 What percentage of your household's annual spend on items for personal use such as jewellery, watches, travel and baby goods was spent via the internet? *Not Don't know and not Don't do at Q23*														
None	56.8%	229	53.8%	38	47.3%	35	62.2%	34	63.4%	16	53.7%	51	65.4%	56
1 - 10%	2.2%	9	2.5%	2	5.8%	4	3.0%	2	0.0%	0	1.1%	1	0.0%	0
11 - 20%	3.7%	15	1.7%	1	5.9%	4	2.0%	1	2.9%	1	3.8%	4	4.6%	4
21 - 30%	2.4%	10	0.0%	0	2.8%	2	8.4%	5	0.0%	0	1.8%	2	1.4%	1
31 - 40%	0.7%	3	0.0%	0	0.8%	1	3.8%	2	0.0%	0	0.0%	0	0.0%	0
41 - 50%	7.3%	30	4.0%	3	6.0%	4	8.1%	4	11.1%	3	12.4%	12	4.0%	3
51 - 60%	0.7%	3	0.0%	0	2.3%	2	2.0%	1	0.0%	0	0.0%	0	0.0%	0
61 - 70%	0.9%	3	0.0%	0	0.0%	0	0.0%	0	4.4%	1	2.5%	2	0.0%	0
71 - 80%	1.2%	5	3.4%	2	1.4%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
81 - 90%	1.3%	5	2.6%	2	2.3%	2	0.0%	0	0.0%	0	1.9%	2	0.0%	0
91 - 99%	0.5%	2	0.0%	0	0.0%	0	0.0%	0	4.4%	1	1.2%	1	0.0%	0
100%	21.3%	86	27.3%	19	25.4%	19	10.6%	6	13.9%	3	21.6%	20	21.7%	19
(Don't know / varies)	1.1%	5	4.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Mean:		*30.78*		*36.58*		*35.54*		*20.50*		*27.00*		*33.81*		*26.45*
Weighted base:		404		71		73		55		25		94		85
Sample:		381		63		66		61		41		82		68

Q25 When your household is shopping for books and stationery, where do you normally go? Please tell us about all the locations you use on a regular basis. [MR]

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Aldi, Plymouth Street, Merthyr Tydfil, CF47 0TP	0.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, The Walk, Ebbw Vale, NP23 6AY	0.3%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Dowlais Top, Merthyr Tydfil	2.4%	15	0.0%	0	2.7%	3	0.0%	0	0.0%	0	0.0%	0	8.9%	12
Asda, High Street, Blackwood	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	4	0.0%	0
Asda, Lakeside Retail Park, Nanytyglo, Brynmawr, NP23 4SL	7.5%	48	3.4%	4	6.1%	6	19.0%	18	14.7%	7	7.5%	10	1.7%	2
B&M Home Store, Dowlais Top Retail Park, Merthyr Tydfil	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
B&M Home Store, Rhyd-Y-Blew, Ebbw Vale, NP23 5YD	0.8%	5	0.0%	0	4.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Gwent Shopping Centre, Tredegar	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Home Bargains, James Street, Ebbw Vale	0.8%	5	0.5%	1	1.0%	1	1.1%	1	0.0%	0	1.6%	2	0.0%	0
Home Bargains, Lakeside Retail Park, Brynmawr	0.9%	6	0.0%	0	0.0%	0	4.0%	4	0.0%	0	1.6%	2	0.0%	0
Morrisons, Beaufort Road, Ebbw Vale, NP23 5WS	4.8%	30	5.4%	6	9.8%	10	1.8%	2	0.0%	0	0.4%	1	8.5%	12
Peacocks, Unit 1, Market Street, Ebbw Vale, NP23 6HP	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Tesco Extra, Beacons Place, Merthyr Tydfil, CF47 0AL	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Tesco Extra, Pontymister Industrial Estate, Risca, NP11 6NP	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	3	0.0%	0
Tesco, Castle Street, Abertillery, NP13 1UR	1.9%	12	0.0%	0	0.0%	0	0.0%	0	2.4%	1	7.8%	11	0.0%	0
Tesco, North West Approach, Ebbw Vale, NP23 6TS	7.7%	49	12.0%	14	8.7%	9	4.8%	5	3.8%	2	4.2%	6	10.2%	14
Abergavenny Town Centre	6.7%	43	5.5%	6	12.4%	12	7.9%	7	5.9%	3	6.4%	9	3.6%	5
Abertillery Town Centre	1.5%	9	0.0%	0	0.0%	0	0.0%	0	2.4%	1	5.9%	8	0.0%	0
Blackwood Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0
Blaina Town Centre	0.5%	3	0.0%	0	0.0%	0	0.0%	0	6.8%	3	0.0%	0	0.0%	0
Brynmawr Town Centre	2.6%	16	1.6%	2	0.6%	1	13.0%	12	2.4%	1	0.4%	1	0.0%	0
Cardiff City Centre	3.5%	22	4.5%	5	3.1%	3	3.1%	3	2.9%	1	4.2%	6	2.9%	4
Cwmbran Town Centre	5.2%	33	3.4%	4	3.9%	4	3.5%	3	4.7%	2	13.5%	19	0.5%	1
Ebbw Vale Town Centre	7.6%	49	20.5%	24	12.3%	12	4.1%	4	3.8%	2	2.1%	3	2.7%	4
Merthyr Tydfil Town Centre	1.6%	10	0.5%	1	3.1%	3	1.1%	1	0.0%	0	0.0%	0	3.7%	5
Newport City Centre	0.6%	4	0.0%	0	0.0%	0	0.6%	1	1.5%	1	1.7%	2	0.0%	0
Tredegar Town Centre	2.8%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.8%	18
Cwmbran Retail Park, Cwmbran Drive, Cwmbran (B&Q, Currys, Next, Dreams, Halfords)	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	4	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil (B&Q, Matalan, M&S, Boots, Next)	0.6%	4	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.4%	1	1.0%	1
Festival Park Factory Outlet Shopping Centre, Ebbw Vale (Sports Direct, Mountain Warehouse, Holland & Barrett, Claire's, The Works)	4.9%	31	8.4%	10	9.4%	9	3.0%	3	3.8%	2	2.4%	3	2.7%	4
Lakeside Retail Park, Nantyglo, Brynmawr (Asda, Halfords, Pets at Home, Home Bargains)	0.9%	6	0.0%	0	0.0%	0	0.6%	1	0.0%	0	3.8%	5	0.0%	0
Trago Mills, Swansea Road, Merthyr Tydfil	0.3%	2	0.5%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	37.3%	238	34.9%	41	41.4%	41	28.2%	27	36.2%	16	41.1%	57	39.1%	55
Home catalogue	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.5%	1

Column %ges.

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Cwm	0.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Retail Park, Newport	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llanhilleth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Monmouth	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Pontypool	0.3%	2	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Swansea	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	0.2%	1	0.5%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
(Don’t do this type of shopping)	24.3%	155	28.6%	34	18.7%	19	27.3%	26	25.6%	11	20.2%	28	26.3%	37
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120

Mean score: [%]

Q26 What percentage of your household's annual spend on books and stationery was spent via the internet before Covid-19?
Not Don't know and not Don't do at Q25

None	46.4%	223	43.0%	36	46.5%	38	56.7%	39	48.2%	16	44.5%	50	43.9%	46
1 - 10%	4.3%	21	7.7%	6	2.5%	2	3.2%	2	4.9%	2	4.7%	5	3.0%	3
11 - 20%	2.7%	13	0.0%	0	0.0%	0	5.6%	4	3.2%	1	3.6%	4	3.8%	4
21 - 30%	1.3%	6	2.2%	2	1.3%	1	0.0%	0	0.0%	0	3.2%	4	0.0%	0
31 - 40%	0.8%	4	0.0%	0	0.7%	1	0.0%	0	3.0%	1	1.0%	1	1.2%	1
41 - 50%	4.2%	20	4.1%	3	8.0%	6	4.3%	3	4.3%	1	2.6%	3	3.0%	3
51 - 60%	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
61 - 70%	2.1%	10	5.8%	5	1.2%	1	0.0%	0	0.0%	0	0.0%	0	4.3%	4
71 - 80%	4.2%	20	6.2%	5	7.2%	6	2.4%	2	1.1%	0	5.1%	6	1.2%	1
81 - 90%	1.4%	7	1.3%	1	2.5%	2	1.7%	1	1.1%	0	0.0%	0	2.0%	2
91 - 99%	0.4%	2	1.3%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
100%	31.7%	153	26.2%	22	28.8%	23	26.1%	18	34.2%	11	35.3%	39	37.5%	39
(Don’t know / varies)	0.4%	2	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*42.04*		*41.93*		*43.60*		*33.15*		*40.41*		*43.12*		*46.09*
Weighted base:		481		83		81		68		33		112		104
Sample:		471		76		79		73		58		99		86

Q27 When your household is shopping for household appliances such as washing machines, fridges, cookers and kettles, where do you normally go? Please tell us about all the locations you use on a regular basis. [MR]

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Asda, Dowlais Top, Merthyr Tydfil	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.9%	1
Asda, Lakeside Retail Park, Nanytyglo, Brynmawr, NP23 4SL	3.6%	23	1.6%	2	3.3%	3	10.9%	10	9.5%	4	2.5%	3	0.0%	0
B&M Home Store, Rhyd-Y-Blew, Ebbw Vale, NP23 5YD	0.8%	5	0.5%	1	2.3%	2	0.0%	0	0.0%	0	0.0%	0	1.4%	2
B&Q, Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	0.8%	5	2.1%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.5%	1
B&Q, Unit 1, Lockgate Retail Park, Cwmbran	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	5	0.0%	0
Curry PC World, Unit 5A, Cwmbran Retail Park, Cwmbran, NP44 3JQ	4.2%	27	1.0%	1	0.0%	0	4.2%	4	2.3%	1	14.9%	21	0.0%	0
Currys / PC World, Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	14.2%	91	9.4%	11	23.7%	24	20.8%	20	13.1%	6	5.8%	8	15.8%	22
Home Bargains, Gwent Shopping Centre, Tredegar	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Morrisons, Azalea Road, Rogerstone, Newport, NP10 9HZ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Morrisons, Beaufort Road, Ebbw Vale, NP23 5WS	0.9%	6	1.5%	2	1.0%	1	0.0%	0	0.0%	0	1.2%	2	0.9%	1
Sainsbury's, Newbridge Road Industrial Estate, Blackwood	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.8%	1	0.0%	0
Tesco Extra, Pontymister Industrial Estate, Risca, NP11 6NP	0.6%	4	0.0%	0	0.0%	0	0.0%	0	1.5%	1	2.5%	3	0.0%	0
Tesco, Castle Street, Abertillery, NP13 1UR	1.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	7	0.0%	0
Tesco, North West Approach, Ebbw Vale, NP23 6TS	0.9%	6	2.5%	3	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Abergavenny Town Centre	0.7%	5	0.0%	0	1.7%	2	0.6%	1	0.0%	0	1.7%	2	0.0%	0
Abertillery Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Blackwood Town Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0
Brynmawr Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Cardiff City Centre	1.5%	9	2.9%	3	0.6%	1	0.0%	0	0.8%	0	3.6%	5	0.0%	0
Cwmbran Town Centre	1.6%	10	0.0%	0	1.0%	1	0.6%	1	0.0%	0	6.2%	9	0.0%	0
Ebbw Vale Town Centre	18.4%	117	20.9%	24	26.7%	27	20.1%	19	13.1%	6	12.9%	18	16.7%	23
Merthyr Tydfil Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.9%	1
Newport City Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Tredegar Town Centre	0.5%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Cwmbran Retail Park, Cwmbran Drive, Cwmbran (B&Q, Currys, Next, Dreams, Halfords)	4.5%	29	2.0%	2	0.0%	0	2.9%	3	7.7%	3	14.6%	20	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil (B&Q, Matalan, M&S, Boots, Next)	23.4%	149	25.1%	29	20.4%	20	27.2%	26	20.8%	9	9.5%	13	36.1%	51
Dowlais Top Retail Park, Merthyr Tydfil (Carpetright, B&M)	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Festival Park Factory Outlet Shopping Centre, Ebbw Vale (Sports Direct, Mountain Warehouse, Holland & Barrett, Claire's, The Works)	0.3%	2	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Lakeside Retail Park, Nantyglo, Brynmawr (Asda, Halfords, Pets at Home, Home Bargains)	0.2%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Trago Mills, Swansea Road, Merthyr Tydfil	0.3%	2	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.4%	1	0.0%	0

Column %ges.

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Newport Retail Park (Spytty Retail Park), Spytty Road, Newport	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	4	0.0%	0
Internet / delivered	40.5%	258	38.4%	45	39.6%	40	30.6%	29	35.1%	16	52.8%	74	39.0%	55
Home catalogue	1.5%	10	2.9%	3	1.0%	1	3.0%	3	0.8%	0	1.6%	2	0.0%	0
Argos, King St, Abergavenny NP7 5SE	0.3%	2	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Beaufort	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff Gate Retail Park, Pontprennau, Cardiff	0.5%	3	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.4%	1	0.9%	1
CostCo, Capital Retail Park, Cardiff	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Cribbs Causeway, Bristol	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crickhowell	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Currys / PC World, Newport Road, Cardiff	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llantrisant	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Pontypool	0.3%	2	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0
The Walk Retail Centre, Ebbw Vale	0.3%	2	0.5%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Troy Electrical, Ebbw Vale	0.9%	6	1.0%	1	0.6%	1	0.6%	1	2.3%	1	0.8%	1	1.0%	1
(Don't know)	0.8%	5	0.0%	0	1.7%	2	0.0%	0	1.5%	1	2.1%	3	0.0%	0
(Don't do this type of shopping)	9.0%	57	16.4%	19	3.3%	3	8.1%	8	4.7%	2	3.8%	5	13.9%	20
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120

Mean score: [%]

Q28 What percentage of your household's annual spend on household appliances such as washing machines, fridges, cookers and kettles was spent via the internet before Covid-19?
Not Don't know and not Don't do at Q27

None	51.5%	296	46.0%	45	53.0%	50	62.7%	55	60.1%	25	44.0%	58	51.9%	63
1 - 10%	2.0%	11	1.2%	1	0.6%	1	3.8%	3	1.7%	1	2.9%	4	1.6%	2
11 - 20%	2.4%	14	3.5%	3	0.0%	0	4.5%	4	0.8%	0	2.3%	3	2.6%	3
21 - 30%	2.1%	12	0.6%	1	0.0%	0	6.0%	5	0.0%	0	4.0%	5	1.0%	1
31 - 40%	1.4%	8	3.0%	3	1.8%	2	0.0%	0	0.8%	0	1.4%	2	1.0%	1
41 - 50%	8.0%	46	9.4%	9	9.3%	9	6.1%	5	4.7%	2	8.3%	11	8.3%	10
51 - 60%	1.0%	6	1.9%	2	0.0%	0	1.2%	1	2.6%	1	0.0%	0	1.7%	2
61 - 70%	1.1%	6	2.3%	2	1.1%	1	0.0%	0	0.8%	0	2.2%	3	0.0%	0
71 - 80%	2.0%	11	1.9%	2	1.1%	1	0.0%	0	0.0%	0	5.4%	7	1.0%	1
81 - 90%	1.6%	9	3.8%	4	1.1%	1	0.0%	0	0.0%	0	1.7%	2	1.6%	2
91 - 99%	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
100%	26.2%	150	24.2%	24	31.0%	30	15.7%	14	28.5%	12	27.9%	37	28.8%	35
(Don't know / varies)	0.7%	4	2.3%	2	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Mean:		*36.60*		*39.61*		*39.43*		*22.38*		*33.55*		*41.75*		*37.69*
Weighted base:		575		98		95		87		42		132		121
Sample:		571		92		94		92		73		118		102

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Q29 When your household is shopping for DIY goods and equipment, items for the garden including plants and pet and pet-related goods, where do you normally go? Please tell us about all the locations you use on a regular basis. [MR]														
Aldi, Blackwood Gate Retail Park, Blackwood, NP12 2FS	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Aldi, The Walk, Ebbw Vale, NP23 6AY	0.3%	2	0.9%	1	0.0%	0	0.0%	0	0.8%	0	0.4%	1	0.0%	0
Asda, Lakeside Retail Park, Nanytyglo, Brynmawr, NP23 4SL	1.2%	8	0.0%	0	1.7%	2	2.9%	3	0.8%	0	2.0%	3	0.0%	0
B&M Home Store, Dowlais Top Retail Park, Merthyr Tydfil	0.2%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1
B&M Home Store, Rhyd-Y-Blew, Ebbw Vale, NP23 5YD	12.7%	81	11.5%	14	23.1%	23	9.0%	8	4.5%	2	13.4%	19	10.7%	15
B&Q, Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	19.8%	126	16.3%	19	21.7%	22	29.5%	28	25.0%	11	10.0%	14	22.8%	32
B&Q, Unit 1, Lockgate Retail Park, Cwmbran	6.2%	40	1.0%	1	1.0%	1	6.0%	6	1.6%	1	21.4%	30	0.9%	1
Heron Frozen Foods / B&M Express, 32 Bethcar Street, Ebbw Vale, NP23 6HQ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Home Bargains, Gwent Shopping Centre, Tredegar	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Home Bargains, James Street, Ebbw Vale	0.7%	4	0.0%	0	1.0%	1	0.6%	1	0.8%	0	1.2%	2	0.5%	1
Home Bargains, Lakeside Retail Park, Brynmawr	0.8%	5	0.0%	0	0.0%	0	2.9%	3	0.8%	0	1.3%	2	0.0%	0
Morrisons, Beaufort Road, Ebbw Vale, NP23 5WS	1.0%	7	0.0%	0	1.7%	2	1.8%	2	0.0%	0	0.0%	0	2.2%	3
Tesco Extra, Pontymister Industrial Estate, Risca, NP11 6NP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Tesco, Castle Street, Abertillery, NP13 1UR	0.8%	5	0.0%	0	0.0%	0	1.2%	1	0.0%	0	2.8%	4	0.0%	0
Tesco, North West Approach, Ebbw Vale, NP23 6TS	0.8%	5	0.5%	1	0.6%	1	0.0%	0	0.0%	0	2.4%	3	0.5%	1
Abergavenny Town Centre	2.1%	13	0.0%	0	1.7%	2	5.6%	5	7.8%	3	1.2%	2	1.0%	1
Abertillery Town Centre	6.1%	39	0.9%	1	0.0%	0	1.2%	1	5.4%	2	24.4%	34	0.0%	0
Blackwood Town Centre	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	3	0.0%	0
Blaina Town Centre	0.4%	3	0.0%	0	0.0%	0	1.9%	2	2.4%	1	0.0%	0	0.0%	0
Brynmawr Town Centre	6.8%	43	1.6%	2	6.2%	6	32.1%	30	7.8%	3	0.0%	0	0.9%	1
Cardiff City Centre	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cwmbran Town Centre	1.5%	10	0.0%	0	0.0%	0	0.0%	0	0.8%	0	6.6%	9	0.0%	0
Ebbw Vale Town Centre	17.7%	113	38.0%	44	32.0%	32	5.6%	5	14.5%	7	5.6%	8	11.9%	17
Merthyr Tydfil Town Centre	0.8%	5	2.5%	3	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Newport City Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Tredegar Town Centre	3.3%	21	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	13.3%	19
Blackwood Gate Retail Park, Blackwood Road, Blackwood (Home Bargains, Aldi, Pet Hut, Sports Direct)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Cwmbran Retail Park, Cwmbran Drive, Cwmbran (B&Q, Currys, Next, Dreams, Halfords)	3.8%	24	0.0%	0	1.7%	2	1.1%	1	7.0%	3	13.0%	18	0.0%	0
Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil (B&Q, Matalan, M&S, Boots, Next)	13.7%	87	22.0%	26	13.8%	14	9.0%	9	14.5%	7	6.1%	8	17.1%	24
Festival Park Factory Outlet Shopping Centre, Ebbw Vale (Sports Direct, Mountain Warehouse, Holland & Barrett, Claire's, The Works)	0.6%	4	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	1.8%	2
Lakeside Retail Park, Nantyglo, Brynmawr (Asda, Halfords, Pets at	1.5%	10	0.9%	1	0.6%	1	2.9%	3	2.4%	1	0.8%	1	2.3%	3

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Home, Home Bargains)														
Trago Mills, Swansea Road, Merthyr Tydfil	0.9%	6	2.0%	2	0.0%	0	1.9%	2	2.2%	1	0.0%	0	0.5%	1
Internet / delivered	10.7%	68	8.2%	10	6.4%	6	10.0%	9	11.6%	5	17.4%	24	9.5%	13
Home catalogue	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.4%	1	0.5%	1
B&M Home Store, Rassau, Ebbw Vale	1.0%	6	4.5%	5	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1
B&Q, Culverhouse, Cardiff	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
B&Q, Gallagher Retail Park, Caerphilly	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Beaufort	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff Gate Retail Park, Pontprennau, Cardiff	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Crown Business Park, Tredegar	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.9%	1
Cwm	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Llandovery	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llanhilleth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Pontypool	0.3%	2	0.0%	0	0.0%	0	1.9%	2	0.8%	0	0.0%	0	0.0%	0
Rassau	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Rassau Industrial Estate	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rogerstone	0.5%	3	0.0%	0	0.0%	0	0.0%	0	1.5%	1	1.7%	2	0.0%	0
Screwfix, Glandwr Industrial Estate, Aberbeeg, Abertillery	0.7%	5	0.0%	0	0.0%	0	0.0%	0	3.7%	2	2.1%	3	0.0%	0
Screwfix, Waun-Y-Pound Industrial Estate, Ebbw Vale	4.8%	31	1.0%	1	7.0%	7	10.1%	10	3.0%	1	0.8%	1	7.6%	11
Usk	0.3%	2	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Victoria Garden Centre, Tredegar	1.7%	11	3.9%	5	0.6%	1	1.1%	1	0.8%	0	0.0%	0	3.2%	5
(Don't know)	0.5%	3	0.5%	1	0.0%	0	0.0%	0	0.8%	0	1.7%	2	0.0%	0
(Don't do this type of shopping)	16.9%	108	19.5%	23	17.5%	18	13.4%	13	21.8%	10	9.1%	13	22.9%	32
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120

Mean score: [%]

Q30 What percentage of your household's annual spend on DIY goods and equipment, items for the garden including plants and pet and pet-related good was spent via the internet before Covid-19?
Not Don't know and not Don't do at Q29

None	80.6%	424	84.4%	79	86.9%	72	80.3%	66	75.3%	26	75.4%	94	80.1%	87
1 - 10%	3.6%	19	0.6%	1	2.7%	2	4.8%	4	8.5%	3	5.1%	6	2.5%	3
11 - 20%	3.7%	20	2.4%	2	4.6%	4	4.0%	3	5.0%	2	3.7%	5	3.6%	4
21 - 30%	1.4%	8	1.3%	1	3.3%	3	0.7%	1	0.0%	0	1.4%	2	1.2%	1
31 - 40%	0.9%	5	2.0%	2	0.0%	0	3.5%	3	0.0%	0	0.0%	0	0.0%	0
41 - 50%	2.0%	10	3.0%	3	1.3%	1	2.0%	2	0.0%	0	2.2%	3	1.9%	2
51 - 60%	0.4%	2	1.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
61 - 70%	0.4%	2	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
71 - 80%	1.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2	3.6%	4
81 - 90%	0.4%	2	0.0%	0	0.0%	0	0.0%	0	3.1%	1	0.0%	0	1.1%	1
91 - 99%	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
100%	4.7%	25	3.1%	3	0.0%	0	3.4%	3	8.1%	3	8.5%	11	5.4%	6
(Don't know / varies)	0.7%	4	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.6%	1
Mean:		*9.38*		*7.00*		*3.58*		*7.88*		*12.39*		*13.28*		*11.54*
Weighted base:		526		94		82		82		35		125		108
Sample:		514		87		78		88		60		110		91

Q31 Excluding food, during the Covid-19 restrictions, have you or members of your household purchased any items online or by mail order that you would previously have purchased in a shop?

Yes	31.2%	199	32.6%	38	34.3%	34	25.7%	24	27.1%	12	37.1%	52	26.9%	38
No	68.3%	435	65.3%	77	65.7%	66	74.3%	70	71.5%	32	62.9%	88	73.1%	103
(Don't know)	0.5%	3	2.1%	2	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	

Q32 Which of the following products have you or members of your household purchased online or by mail order that you would previously have purchased in a shop? [MR/PR]
Yes at Q31

Clothing	47.5%	94	36.8%	14	59.8%	20	37.5%	9	22.3%	3	51.5%	27	56.2%	21
Footwear	43.6%	86	34.9%	13	49.0%	17	49.5%	12	20.0%	2	43.9%	23	50.5%	19
Personal care items such as soap, toothpaste, deodorants etc	21.8%	43	10.6%	4	19.2%	7	29.5%	7	11.1%	1	32.2%	17	19.7%	7
Medical or pharmaceutical products	13.3%	26	1.6%	1	12.6%	4	11.6%	3	5.8%	1	18.6%	10	22.0%	8
Recreational goods such as toys, games, sports and recreational equipment and items related to your hobbies	34.3%	68	16.5%	6	49.0%	17	39.0%	9	14.1%	2	44.5%	23	28.5%	11
Audio-visual goods such as televisions, cameras, computers and recording and recorded material (such as CDs and DVDs)	19.5%	39	15.2%	6	25.9%	9	31.1%	8	2.9%	0	24.5%	13	8.9%	3
Furniture, carpets and floor coverings	6.1%	12	3.2%	1	7.9%	3	0.0%	0	17.0%	2	9.1%	5	3.5%	1
Items for the house including household textiles, tableware, glassware and non-electrical household utensils such as saucepans and cutlery	24.4%	48	14.2%	5	18.9%	6	22.9%	6	14.1%	2	40.0%	21	22.6%	9
Items for personal use such as jewellery, watches, travel and baby goods	10.7%	21	7.8%	3	15.6%	5	0.0%	0	2.9%	0	19.3%	10	6.5%	2
Books and stationery	23.4%	46	17.4%	7	42.6%	15	18.5%	4	8.7%	1	24.5%	13	18.4%	7
Household appliances such as washing machines, fridges, cookers and kettles	15.3%	30	17.1%	7	11.5%	4	16.1%	4	2.9%	0	12.4%	6	24.1%	9
DIY goods and equipment	35.4%	70	31.1%	12	36.6%	13	27.8%	7	41.2%	5	34.5%	18	42.9%	16
Garden plants and equipment	32.1%	64	23.2%	9	39.7%	14	41.9%	10	28.3%	3	28.0%	15	34.5%	13
Pet and pet-related goods	16.1%	32	12.5%	5	18.8%	6	16.6%	4	0.0%	0	14.3%	7	24.4%	9
(Don't know / other)	1.5%	3	0.0%	0	0.0%	0	6.9%	2	0.0%	0	0.0%	0	3.2%	1
Weighted base:		199		38		34		24		12		52		38
Sample:		175		33		30		23		18		41		30

Mean score: [Very likely = 2, Quite likely = 1, Not sure = 0, Quite unlikely = -1, Very unlikely = -2]

Q33 Given your recent experiences of purchasing these goods online / by mail order, how likely are you to use this method of shopping, or use it more, in the future? [PR]
Yes at Q31

Very likely	28.3%	56	26.5%	10	30.4%	10	41.1%	10	43.5%	5	28.0%	15	15.5%	6
Quite likely	35.2%	70	29.2%	11	33.2%	11	25.9%	6	20.0%	2	53.3%	28	29.4%	11
Not sure	13.5%	27	15.2%	6	16.0%	5	16.4%	4	17.0%	2	8.0%	4	14.1%	5
Quite unlikely	6.5%	13	12.3%	5	4.6%	2	6.9%	2	5.5%	1	2.1%	1	8.4%	3
Very unlikely	16.5%	33	16.9%	6	15.8%	5	9.7%	2	14.0%	2	8.6%	4	32.7%	12
Mean:		*0.52*		*0.36*		*0.58*		*0.82*		*0.74*		*0.90*		*-0.14*
Weighted base:		199		38		34		24		12		52		38
Sample:		175		33		30		23		18		41		30

Q34 And which of the following product types (if any) are you likely to buy more of online / by mail order in the future? [PR]
Yes at Q31

Clothing

Yes	50.9%	101	42.8%	16	55.1%	19	60.1%	15	40.0%	5	57.9%	30	43.1%	16
No	47.7%	95	57.2%	22	41.8%	14	39.9%	10	51.2%	6	42.1%	22	55.1%	21
(Don't know)	1.4%	3	0.0%	0	3.1%	1	0.0%	0	8.8%	1	0.0%	0	1.8%	1
Weighted base:		199		38		34		24		12		52		38
Sample:		175		33		30		23		18		41		30

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Footwear														
Yes	47.8%	95	47.3%	18	45.4%	16	60.8%	15	42.9%	5	56.9%	30	31.1%	12
No	50.3%	100	52.7%	20	54.6%	19	39.2%	10	48.2%	6	43.1%	22	61.8%	23
(Don't know)	1.9%	4	0.0%	0	0.0%	0	0.0%	0	8.8%	1	0.0%	0	7.1%	3
Weighted base:		199		38		34		24		12		52		38
Sample:		175		33		30		23		18		41		30
Personal care items such as soap, toothpaste, deodorants etc														
Yes	21.0%	42	4.6%	2	20.6%	7	11.4%	3	34.7%	4	32.2%	17	24.4%	9
No	77.6%	154	95.4%	36	76.3%	26	88.6%	22	56.4%	7	67.8%	35	73.8%	28
(Don't know)	1.4%	3	0.0%	0	3.1%	1	0.0%	0	8.8%	1	0.0%	0	1.8%	1
Weighted base:		199		38		34		24		12		52		38
Sample:		175		33		30		23		18		41		30
Medical or pharmaceutical products														
Yes	14.3%	28	3.0%	1	8.0%	3	4.5%	1	29.4%	4	18.0%	9	27.7%	10
No	84.8%	168	97.0%	37	92.0%	32	95.5%	23	61.7%	7	82.0%	43	70.6%	27
(Don't know)	0.9%	2	0.0%	0	0.0%	0	0.0%	0	8.8%	1	0.0%	0	1.8%	1
Weighted base:		199		38		34		24		12		52		38
Sample:		175		33		30		23		18		41		30
Recreational goods such as toys, games, sports and recreational equipment and items related to your hobbies														
Yes	49.3%	98	30.8%	12	55.9%	19	57.8%	14	60.6%	7	60.7%	31	37.5%	14
No	49.3%	98	69.2%	26	41.1%	14	42.2%	10	30.6%	4	39.3%	20	60.7%	23
(Don't know)	1.4%	3	0.0%	0	3.1%	1	0.0%	0	8.8%	1	0.0%	0	1.8%	1
Weighted base:		199		38		34		24		12		52		38
Sample:		175		33		30		23		18		41		30
Audio-visual goods such as televisions, cameras, computers and recording and recorded material (such as CDs and DVDs)														
Yes	40.8%	81	29.4%	11	39.5%	14	58.3%	14	43.5%	5	52.1%	27	25.8%	10
No	58.3%	116	70.6%	27	60.5%	21	41.7%	10	47.6%	6	47.9%	25	72.4%	27
(Don't know)	0.9%	2	0.0%	0	0.0%	0	0.0%	0	8.8%	1	0.0%	0	1.8%	1
Weighted base:		199		38		34		24		12		52		38
Sample:		175		33		30		23		18		41		30
Furniture, carpets and floor coverings														
Yes	17.0%	34	7.5%	3	12.7%	4	20.8%	5	38.2%	5	22.5%	12	13.7%	5
No	80.2%	159	87.7%	33	87.3%	30	79.2%	19	52.9%	6	77.5%	40	79.2%	30
(Don't know)	2.8%	6	4.8%	2	0.0%	0	0.0%	0	8.8%	1	0.0%	0	7.1%	3
Weighted base:		199		38		34		24		12		52		38
Sample:		175		33		30		23		18		41		30
Items for the house including household textiles, tableware, glassware and non-electrical household utensils such as saucepans and cutlery														
Yes	32.5%	65	23.4%	9	30.1%	10	35.1%	9	46.5%	6	38.5%	20	29.4%	11
No	63.8%	127	71.8%	27	64.9%	22	64.9%	16	44.7%	5	61.5%	32	63.4%	24
(Don't know)	3.7%	7	4.8%	2	4.9%	2	0.0%	0	8.8%	1	0.0%	0	7.1%	3
Weighted base:		199		38		34		24		12		52		38
Sample:		175		33		30		23		18		41		30
Items for personal use such as jewellery, watches, travel and baby goods														
Yes	24.5%	49	20.4%	8	37.9%	13	28.1%	7	25.9%	3	26.0%	13	11.9%	5
No	73.0%	145	79.6%	30	62.1%	21	67.6%	16	65.3%	8	74.0%	38	80.9%	31
(Don't know)	2.4%	5	0.0%	0	0.0%	0	4.4%	1	8.8%	1	0.0%	0	7.1%	3
Weighted base:		199		38		34		24		12		52		38
Sample:		175		33		30		23		18		41		30

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Books and stationery														
Yes	42.4%	84	36.6%	14	40.7%	14	44.9%	11	49.4%	6	45.9%	24	41.1%	16
No	56.1%	111	63.4%	24	59.3%	20	55.1%	13	41.8%	5	54.1%	28	53.6%	20
(Don't know)	1.6%	3	0.0%	0	0.0%	0	0.0%	0	8.8%	1	0.0%	0	5.4%	2
Weighted base:		199		38		34		24		12		52		38
Sample:		175		33		30		23		18		41		30
Household appliances such as washing machines, fridges, cookers and kettles														
Yes	43.1%	86	43.4%	17	35.0%	12	48.6%	12	32.3%	4	54.5%	28	34.6%	13
No	55.0%	109	56.6%	22	63.4%	22	51.4%	12	58.8%	7	45.5%	24	60.0%	23
(Don't know)	1.8%	4	0.0%	0	1.6%	1	0.0%	0	8.8%	1	0.0%	0	5.4%	2
Weighted base:		199		38		34		24		12		52		38
Sample:		175		33		30		23		18		41		30
DIY goods and equipment														
Yes	32.7%	65	31.1%	12	17.2%	6	46.4%	11	46.5%	6	30.3%	16	38.5%	15
No	64.6%	128	68.9%	26	77.9%	27	53.6%	13	44.7%	5	69.7%	36	54.4%	21
(Don't know)	2.8%	5	0.0%	0	4.9%	2	0.0%	0	8.8%	1	0.0%	0	7.1%	3
Weighted base:		199		38		34		24		12		52		38
Sample:		175		33		30		23		18		41		30
Garden plants and equipment														
Yes	32.6%	65	39.8%	15	23.6%	8	44.0%	11	41.2%	5	29.1%	15	28.0%	11
No	65.4%	130	60.2%	23	76.4%	26	56.0%	14	47.1%	6	70.9%	37	64.9%	25
(Don't know)	2.1%	4	0.0%	0	0.0%	0	0.0%	0	11.8%	1	0.0%	0	7.1%	3
Weighted base:		199		38		34		24		12		52		38
Sample:		175		33		30		23		18		41		30
Pet and pet-related goods														
Yes	27.2%	54	17.1%	7	25.7%	9	41.6%	10	29.4%	4	25.4%	13	31.2%	12
No	72.3%	144	82.9%	32	74.3%	25	58.4%	14	61.7%	7	74.6%	39	68.8%	26
(Don't know)	0.5%	1	0.0%	0	0.0%	0	0.0%	0	8.8%	1	0.0%	0	0.0%	0
Weighted base:		199		38		34		24		12		52		38
Sample:		175		33		30		23		18		41		30
Mean score: [Number of visits per week]														
Q35 How frequently does your household visit the following locations for any purpose? [PR]														
Abertillery Town Centre														
At least 5 times a week	4.2%	27	0.0%	0	1.7%	2	1.2%	1	3.1%	1	12.5%	17	3.8%	5
2-4 times a week	5.6%	36	0.0%	0	0.0%	0	2.9%	3	2.4%	1	22.7%	32	0.0%	0
Once a week	7.2%	46	2.1%	2	1.7%	2	3.4%	3	6.9%	3	24.1%	34	1.4%	2
Once a fortnight	1.5%	9	0.0%	0	0.0%	0	0.0%	0	4.0%	2	4.9%	7	0.5%	1
At least once a month	4.3%	28	6.2%	7	0.0%	0	1.9%	2	10.5%	5	7.1%	10	2.9%	4
Less often	12.5%	79	9.2%	11	9.2%	9	13.0%	12	28.3%	13	21.3%	30	3.3%	5
Never	64.4%	410	81.0%	95	87.4%	87	77.6%	73	45.0%	20	7.5%	11	88.2%	124
(Don't know / varies)	0.3%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.49*		*0.05*		*0.11*		*0.20*		*0.37*		*1.61*		*0.22*
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Blaina Town Centre														
At least 5 times a week	2.4%	15	0.0%	0	2.7%	3	4.7%	4	15.2%	7	0.0%	0	0.9%	1
2-4 times a week	2.6%	16	0.0%	0	1.7%	2	3.0%	3	18.8%	8	2.4%	3	0.0%	0
Once a week	3.1%	20	1.6%	2	0.6%	1	1.7%	2	26.1%	12	2.8%	4	0.0%	0
Once a fortnight	1.8%	11	2.5%	3	0.0%	0	2.4%	2	8.8%	4	1.7%	2	0.0%	0
At least once a month	1.2%	8	0.0%	0	1.0%	1	1.8%	2	5.4%	2	1.7%	2	0.0%	0
Less often	6.1%	39	4.1%	5	3.3%	3	9.6%	9	15.5%	7	9.3%	13	1.4%	2
Never	82.8%	528	91.8%	108	90.7%	91	76.7%	73	10.2%	5	82.1%	115	97.7%	137
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.25*		*0.03*		*0.20*		*0.37*		*1.66*		*0.12*		*0.05*
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120
Brynmawr Town Centre or the Lakeside Retail Park														
At least 5 times a week	4.1%	26	1.6%	2	6.2%	6	16.4%	16	0.0%	0	0.8%	1	0.9%	1
2-4 times a week	12.5%	80	2.5%	3	11.2%	11	32.1%	30	15.2%	7	15.1%	21	5.2%	7
Once a week	17.5%	112	6.5%	8	12.3%	12	33.5%	32	47.4%	21	24.3%	34	3.4%	5
Once a fortnight	8.1%	51	8.3%	10	11.5%	11	1.7%	2	4.8%	2	16.5%	23	2.4%	3
At least once a month	8.1%	52	12.6%	15	10.6%	11	6.4%	6	9.9%	4	5.3%	7	6.1%	9
Less often	22.5%	143	34.2%	40	35.2%	35	8.1%	8	12.6%	6	15.9%	22	23.0%	32
Never	27.2%	174	34.3%	40	13.1%	13	1.7%	2	10.0%	4	22.2%	31	59.1%	83
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.84*		*0.33*		*0.89*		*2.15*		*1.00*		*0.85*		*0.29*
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120
Ebbw Vale Town Centre														
At least 5 times a week	2.8%	18	5.9%	7	8.8%	9	0.6%	1	0.0%	0	0.0%	0	0.9%	1
2-4 times a week	11.5%	73	30.3%	36	21.8%	22	8.2%	8	1.4%	1	2.5%	4	2.8%	4
Once a week	21.4%	137	30.2%	35	31.1%	31	18.7%	18	11.6%	5	17.0%	24	16.6%	23
Once a fortnight	9.9%	63	13.8%	16	11.4%	11	5.3%	5	5.3%	2	10.0%	14	10.3%	14
At least once a month	10.4%	66	6.5%	8	9.6%	10	16.8%	16	19.2%	9	4.2%	6	13.5%	19
Less often	24.9%	159	6.6%	8	13.6%	14	20.3%	19	36.2%	16	33.7%	47	39.0%	55
Never	18.4%	117	5.8%	7	2.1%	2	30.0%	28	26.3%	12	32.7%	46	16.0%	22
(Don't know / varies)	0.6%	4	0.9%	1	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Mean:		*0.81*		*1.62*		*1.53*		*0.56*		*0.28*		*0.34*		*0.43*
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120
Tredegar Town Centre														
At least 5 times a week	2.4%	16	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.8%	14
2-4 times a week	7.5%	48	0.5%	1	1.7%	2	1.1%	1	0.0%	0	0.0%	0	31.5%	44
Once a week	9.0%	57	3.1%	4	3.2%	3	0.0%	0	2.4%	1	0.0%	0	35.1%	49
Once a fortnight	2.2%	14	1.5%	2	1.0%	1	1.9%	2	0.0%	0	0.0%	0	6.8%	10
At least once a month	3.5%	23	7.9%	9	3.8%	4	1.9%	2	0.0%	0	0.0%	0	5.5%	8
Less often	12.8%	81	19.5%	23	22.4%	22	12.4%	12	10.7%	5	8.7%	12	5.2%	7
Never	62.2%	396	65.4%	77	66.3%	66	82.7%	78	86.9%	39	91.3%	128	6.2%	9
(Don't know / varies)	0.4%	2	0.5%	1	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.47*		*0.18*		*0.12*		*0.06*		*0.04*		*0.01*		*1.84*
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120
Cwmbran Town Centre														
At least 5 times a week	0.3%	2	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	0.7%	5	0.0%	0	0.6%	1	0.0%	0	1.6%	1	2.5%	3	0.0%	0
Once a week	7.8%	50	3.0%	3	2.7%	3	7.0%	7	11.7%	5	20.4%	29	2.3%	3
Once a fortnight	9.7%	62	7.1%	8	7.3%	7	14.3%	14	2.4%	1	20.5%	29	2.3%	3
At least once a month	20.3%	130	16.8%	20	24.1%	24	22.4%	21	25.8%	12	24.4%	34	13.5%	19
Less often	29.0%	184	37.2%	44	32.7%	33	27.0%	25	36.1%	16	16.2%	23	31.2%	44
Never	31.8%	202	35.5%	42	29.2%	29	29.4%	28	22.4%	10	16.1%	23	50.7%	71
(Don't know / varies)	0.4%	2	0.5%	1	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.25*		*0.15*		*0.28*		*0.24*		*0.29*		*0.47*		*0.11*
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Merthyr Tydfil Town Centre														
At least 5 times a week	0.4%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
2-4 times a week	0.9%	6	0.5%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	2.8%	4
Once a week	4.6%	29	3.6%	4	6.0%	6	4.7%	4	1.6%	1	2.1%	3	7.6%	11
Once a fortnight	5.9%	38	9.4%	11	7.7%	8	8.2%	8	5.6%	2	0.8%	1	5.4%	8
At least once a month	12.1%	77	7.2%	8	16.8%	17	6.1%	6	17.5%	8	8.7%	12	18.8%	26
Less often	28.2%	180	27.8%	33	39.2%	39	32.5%	31	10.6%	5	16.4%	23	35.4%	50
Never	47.6%	303	50.6%	59	27.5%	27	48.5%	46	64.8%	29	72.0%	101	29.2%	41
(Don't know / varies)	0.3%	2	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.19*		*0.20*		*0.23*		*0.14*		*0.11*		*0.07*		*0.32*
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120
Festival Park, Ebbw Vale														
At least 5 times a week	0.3%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	2.2%	14	4.6%	5	2.1%	2	3.4%	3	0.0%	0	1.7%	2	0.5%	1
Once a week	11.1%	70	19.6%	23	20.1%	20	6.4%	6	8.6%	4	5.0%	7	7.5%	10
Once a fortnight	12.2%	77	16.3%	19	17.7%	18	5.5%	5	11.4%	5	14.3%	20	7.3%	10
At least once a month	18.2%	116	16.7%	20	19.9%	20	21.3%	20	12.1%	5	21.5%	30	14.9%	21
Less often	34.3%	219	18.9%	22	29.0%	29	39.9%	38	47.6%	21	40.7%	57	36.7%	52
Never	21.3%	136	21.3%	25	9.4%	9	23.5%	22	20.3%	9	16.9%	24	33.1%	47
(Don't know / varies)	0.5%	3	1.0%	1	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.34*		*0.57*		*0.45*		*0.30*		*0.23*		*0.28*		*0.21*
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120

Mean score: [Number of visits per week]

Q36 When you visit Abertillery town centre, how frequently do you undertake the following activities? [PR]
Abertillery at least monthly at Q35

Food or Non-food Shopping														
At least 5 times a week	5.1%	7	0.0%	0	50.0%	2	0.0%	0	0.0%	0	5.8%	6	0.0%	0
2-4 times a week	23.2%	34	0.0%	0	0.0%	0	12.0%	1	8.9%	1	29.7%	30	16.9%	2
Once a week	32.3%	47	6.3%	1	50.0%	2	43.7%	4	28.7%	3	36.3%	36	10.1%	1
Once a fortnight	7.6%	11	0.0%	0	0.0%	0	12.0%	1	14.4%	2	8.3%	8	0.0%	0
At least once a month	16.7%	24	68.4%	7	0.0%	0	32.4%	3	30.7%	4	7.1%	7	33.7%	4
Less often	4.9%	7	0.0%	0	0.0%	0	0.0%	0	11.4%	1	5.8%	6	0.0%	0
Never	10.2%	15	25.3%	2	0.0%	0	0.0%	0	5.9%	1	7.0%	7	39.3%	5
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*1.37*		*0.27*		*3.00*		*0.95*		*0.73*		*1.61*		*0.71*
Weighted base:		145		10		3		9		12		100		12
Sample:		138		7		2		8		25		89		7
Visit Financial and Business Services														
At least 5 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0
Once a week	9.1%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.3%	13	0.0%	0
Once a fortnight	3.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	5	0.0%	0
At least once a month	3.5%	5	0.0%	0	0.0%	0	0.0%	0	5.5%	1	2.4%	2	16.9%	2
Less often	3.9%	6	19.0%	2	0.0%	0	0.0%	0	3.0%	0	3.6%	4	0.0%	0
Never	78.8%	115	81.0%	8	100.0%	3	100.0%	9	91.5%	11	73.9%	74	83.1%	10
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.17*		*0.02*		*0.00*		*0.00*		*0.02*		*0.24*		*0.05*
Weighted base:		145		10		3		9		12		100		12
Sample:		138		7		2		8		25		89		7

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Visit other service providers such as hairdressers / barbers, beauty salons or travel agents														
At least 5 times a week	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.9%	2
2-4 times a week	2.0%	3	0.0%	0	0.0%	0	12.4%	1	0.0%	0	1.8%	2	0.0%	0
Once a week	7.5%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.0%	11	0.0%	0
Once a fortnight	3.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	5	0.0%	0
At least once a month	22.6%	33	0.0%	0	0.0%	0	12.4%	1	14.2%	2	28.1%	28	16.9%	2
Less often	13.5%	20	0.0%	0	0.0%	0	12.4%	1	17.0%	2	16.6%	17	0.0%	0
Never	48.2%	70	100.0%	10	100.0%	3	62.9%	6	68.8%	8	35.4%	35	66.3%	8
(Don't know / varies)	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0
Mean:		*0.31*		*0.00*		*0.00*		*0.42*		*0.06*		*0.30*		*0.90*
Weighted base:		145		10		3		9		12		100		12
Sample:		138		7		2		8		25		89		7
Sports, health & fitness facilities														
At least 5 times a week	2.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	4	0.0%	0
2-4 times a week	8.8%	13	0.0%	0	0.0%	0	12.4%	1	8.3%	1	10.8%	11	0.0%	0
Once a week	12.0%	17	0.0%	0	50.0%	2	0.0%	0	0.0%	0	11.7%	12	33.7%	4
Once a fortnight	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
At least once a month	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Less often	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Never	74.4%	108	100.0%	10	50.0%	2	87.6%	8	91.7%	11	70.5%	70	66.3%	8
(Don't know / varies)	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0
Mean:		*0.52*		*0.00*		*0.50*		*0.37*		*0.25*		*0.63*		*0.34*
Weighted base:		145		10		3		9		12		100		12
Sample:		138		7		2		8		25		89		7
To visit bars / pubs														
At least 5 times a week	0.6%	1	0.0%	0	0.0%	0	0.0%	0	3.0%	0	0.6%	1	0.0%	0
2-4 times a week	5.8%	8	0.0%	0	0.0%	0	0.0%	0	8.5%	1	7.4%	7	0.0%	0
Once a week	9.4%	14	0.0%	0	0.0%	0	0.0%	0	3.0%	0	13.4%	13	0.0%	0
Once a fortnight	6.3%	9	0.0%	0	0.0%	0	0.0%	0	9.0%	1	8.2%	8	0.0%	0
At least once a month	15.0%	22	19.0%	2	0.0%	0	0.0%	0	16.3%	2	18.1%	18	0.0%	0
Less often	9.6%	14	0.0%	0	0.0%	0	0.0%	0	3.0%	0	9.5%	10	33.7%	4
Never	52.1%	76	81.0%	8	100.0%	3	100.0%	9	57.4%	7	41.0%	41	66.3%	8
(Don't know / varies)	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0
Mean:		*0.39*		*0.06*		*0.00*		*0.00*		*0.53*		*0.50*		*0.03*
Weighted base:		145		10		3		9		12		100		12
Sample:		138		7		2		8		25		89		7
To visit cafes / coffee shops														
At least 5 times a week	1.2%	2	0.0%	0	50.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	7.3%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.7%	9	16.9%	2
Once a week	10.9%	16	6.3%	1	0.0%	0	6.6%	1	0.0%	0	14.7%	15	0.0%	0
Once a fortnight	6.3%	9	19.0%	2	0.0%	0	0.0%	0	0.0%	0	7.3%	7	0.0%	0
At least once a month	7.6%	11	19.0%	2	0.0%	0	0.0%	0	8.3%	1	7.1%	7	10.1%	1
Less often	9.0%	13	0.0%	0	0.0%	0	0.0%	0	8.5%	1	10.0%	10	16.9%	2
Never	56.5%	82	55.7%	5	50.0%	2	93.4%	8	83.2%	10	50.4%	50	56.1%	7
(Don't know / varies)	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0
Mean:		*0.46*		*0.22*		*2.50*		*0.07*		*0.03*		*0.48*		*0.55*
Weighted base:		145		10		3		9		12		100		12
Sample:		138		7		2		8		25		89		7
To visit restaurants														
At least 5 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0
Once a week	10.5%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.4%	15	0.0%	0
Once a fortnight	5.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.3%	8	0.0%	0
At least once a month	8.5%	12	0.0%	0	0.0%	0	0.0%	0	5.4%	1	11.7%	12	0.0%	0
Less often	9.1%	13	0.0%	0	0.0%	0	24.3%	2	0.0%	0	11.2%	11	0.0%	0
Never	63.3%	92	100.0%	10	100.0%	3	75.7%	7	94.6%	11	49.2%	49	100.0%	12
(Don't know / varies)	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0
Mean:		*0.22*		*0.00*		*0.00*		*0.02*		*0.02*		*0.32*		*0.00*
Weighted base:		145		10		3		9		12		100		12
Sample:		138		7		2		8		25		89		7

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
For work														
At least 5 times a week	11.9%	17	0.0%	0	50.0%	2	0.0%	0	0.0%	0	10.3%	10	43.9%	5
2-4 times a week	2.7%	4	0.0%	0	0.0%	0	12.0%	1	8.9%	1	1.8%	2	0.0%	0
Once a week	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	5.6%	1
Once a fortnight	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
At least once a month	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less often	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Never	81.5%	119	100.0%	10	50.0%	2	88.0%	8	91.1%	11	82.8%	82	50.6%	6
(Don't know / varies)	2.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	3	0.0%	0
Mean:		*0.70*		*0.00*		*2.50*		*0.36*		*0.27*		*0.60*		*2.25*
Weighted base:		145		10		3		9		12		100		12
Sample:		138		7		2		8		25		89		7

Mean score: [Very poor = 1, Poor = 2, Neither = 0, Good = 1, Very good = 2]

Q37 Thinking about Abertillery town centre, how do you rate the town centre for the following facilities on a scale of 1 - 5 (where 1 is very poor and 5 is very good)? [PR]
Abertillery at least monthly at Q35

The range and quality of shops														
1 Very poor	27.1%	39	0.0%	0	0.0%	0	12.4%	1	25.3%	3	32.8%	33	22.4%	3
2 Poor	33.1%	48	19.0%	2	50.0%	2	12.4%	1	14.2%	2	38.7%	39	27.0%	3
3 Neither good nor poor	28.1%	41	55.7%	5	50.0%	2	62.9%	6	37.6%	4	19.7%	20	33.7%	4
4 Good	8.3%	12	19.0%	2	0.0%	0	12.4%	1	17.0%	2	5.2%	5	16.9%	2
5 Very good	3.4%	5	6.3%	1	0.0%	0	0.0%	0	5.9%	1	3.6%	4	0.0%	0
Mean:		*2.28*		*3.13*		*2.50*		*2.75*		*2.64*		*2.08*		*2.45*
Weighted base:		145		10		3		9		12		100		12
Sample:		138		7		2		8		25		89		7
The range and quality of places to eat and drink														
1 Very poor	14.4%	21	0.0%	0	50.0%	2	12.4%	1	8.3%	1	15.2%	15	16.9%	2
2 Poor	24.9%	36	49.5%	5	0.0%	0	12.4%	1	22.9%	3	25.8%	26	15.7%	2
3 Neither good nor poor	35.8%	52	44.3%	4	50.0%	2	75.3%	7	46.3%	6	32.0%	32	16.9%	2
4 Good	14.1%	20	0.0%	0	0.0%	0	0.0%	0	17.0%	2	16.5%	16	16.9%	2
5 Very good	10.9%	16	6.3%	1	0.0%	0	0.0%	0	5.5%	1	10.5%	10	33.7%	4
Mean:		*2.82*		*2.63*		*2.00*		*2.63*		*2.89*		*2.81*		*3.35*
Weighted base:		145		10		3		9		12		100		12
Sample:		138		7		2		8		25		89		7
The availability of car parking														
1 Very poor	18.3%	27	19.0%	2	50.0%	2	32.4%	3	8.5%	1	17.3%	17	16.9%	2
2 Poor	10.4%	15	0.0%	0	0.0%	0	24.7%	2	5.5%	1	12.4%	12	0.0%	0
3 Neither good nor poor	30.2%	44	25.3%	2	0.0%	0	6.6%	1	39.5%	5	32.4%	32	32.6%	4
4 Good	27.3%	40	49.4%	5	0.0%	0	36.3%	3	22.7%	3	27.1%	27	16.9%	2
5 Very good	13.8%	20	6.3%	1	50.0%	2	0.0%	0	23.7%	3	10.9%	11	33.7%	4
Mean:		*3.08*		*3.24*		*3.00*		*2.47*		*3.48*		*3.02*		*3.51*
Weighted base:		145		10		3		9		12		100		12
Sample:		138		7		2		8		25		89		7
The ease of moving around the centre														
1 Very poor	6.7%	10	0.0%	0	0.0%	0	0.0%	0	8.5%	1	8.8%	9	0.0%	0
2 Poor	6.5%	9	0.0%	0	0.0%	0	37.1%	3	8.3%	1	5.2%	5	0.0%	0
3 Neither good nor poor	26.2%	38	44.3%	4	0.0%	0	12.0%	1	17.2%	2	24.9%	25	49.4%	6
4 Good	35.5%	52	49.4%	5	0.0%	0	32.0%	3	33.8%	4	36.1%	36	33.7%	4
5 Very good	25.1%	36	6.3%	1	100.0%	3	19.0%	2	32.2%	4	25.0%	25	16.9%	2
Mean:		*3.66*		*3.62*		*5.00*		*3.33*		*3.73*		*3.63*		*3.67*
Weighted base:		145		10		3		9		12		100		12
Sample:		138		7		2		8		25		89		7

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
The attractiveness and overall experience of visiting the centre														
1 Very poor	23.6%	34	0.0%	0	50.0%	2	0.0%	0	25.7%	3	24.9%	25	39.3%	5
2 Poor	31.0%	45	30.4%	3	0.0%	0	43.7%	4	27.7%	3	31.9%	32	27.0%	3
3 Neither good nor poor	29.5%	43	63.3%	6	50.0%	2	32.0%	3	22.9%	3	27.7%	28	16.9%	2
4 Good	12.4%	18	0.0%	0	0.0%	0	24.3%	2	17.8%	2	13.8%	14	0.0%	0
5 Very good	3.5%	5	6.3%	1	0.0%	0	0.0%	0	5.9%	1	1.7%	2	16.9%	2
Mean:		*2.41*		*2.82*		*2.00*		*2.81*		*2.51*		*2.36*		*2.28*
Weighted base:		145		10		3		9		12		100		12
Sample:		138		7		2		8		25		89		7

Mean score: [Number of visits per week]

Q38 When you visit Blaina town centre, how frequently do you undertake the following activities? [PR]
Blaina at least monthly at Q35

Food or Non-food Shopping														
At least 5 times a week	9.2%	6	0.0%	0	0.0%	0	12.8%	2	14.4%	5	0.0%	0	0.0%	0
2-4 times a week	21.1%	15	38.5%	2	28.2%	2	8.2%	1	24.0%	8	18.4%	2	0.0%	0
Once a week	23.9%	17	0.0%	0	0.0%	0	40.5%	5	25.7%	9	14.8%	2	100.0%	1
Once a fortnight	11.4%	8	23.1%	1	9.3%	1	17.3%	2	10.6%	4	4.9%	1	0.0%	0
At least once a month	13.4%	9	38.4%	2	0.0%	0	13.0%	2	9.5%	3	23.0%	3	0.0%	0
Less often	0.5%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0
Never	20.0%	14	0.0%	0	62.5%	4	8.2%	1	13.7%	5	38.9%	5	0.0%	0
(Don't know / varies)	0.5%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0
Mean:		*1.44*		*1.39*		*0.89*		*1.42*		*1.80*		*0.79*		*1.00*
Weighted base:		70		5		6		13		33		12		1
Sample:		93		3		5		13		61		10		1
Visit Financial and Business Services														
At least 5 times a week	0.9%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
2-4 times a week	1.0%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0
Once a week	10.0%	7	0.0%	0	0.0%	0	0.0%	0	21.1%	7	0.0%	0	0.0%	0
Once a fortnight	0.9%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0
At least once a month	6.5%	5	0.0%	0	0.0%	0	8.5%	1	7.1%	2	9.2%	1	0.0%	0
Less often	5.0%	4	0.0%	0	0.0%	0	13.8%	2	5.2%	2	0.0%	0	0.0%	0
Never	75.6%	53	100.0%	5	100.0%	6	77.8%	10	60.5%	20	90.8%	11	100.0%	1
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.21*		*0.00*		*0.00*		*0.04*		*0.41*		*0.03*		*0.00*
Weighted base:		70		5		6		13		33		12		1
Sample:		93		3		5		13		61		10		1
Visit other service providers such as hairdressers / barbers, beauty salons or travel agents														
At least 5 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	0.8%	1	0.0%	0	0.0%	0	4.5%	1	0.0%	0	0.0%	0	0.0%	0
Once a fortnight	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
At least once a month	10.1%	7	0.0%	0	0.0%	0	30.5%	4	9.5%	3	0.0%	0	0.0%	0
Less often	6.4%	4	0.0%	0	0.0%	0	0.0%	0	13.4%	4	0.0%	0	0.0%	0
Never	82.7%	58	100.0%	5	100.0%	6	65.0%	8	77.1%	26	100.0%	12	100.0%	1
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.05*		*0.00*		*0.00*		*0.14*		*0.04*		*0.00*		*0.00*
Weighted base:		70		5		6		13		33		12		1
Sample:		93		3		5		13		61		10		1

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Sports, health & fitness facilities														
At least 5 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	0.5%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0
Once a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a fortnight	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
At least once a month	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less often	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Never	99.5%	70	100.0%	5	100.0%	6	100.0%	13	98.9%	33	100.0%	12	100.0%	1
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.02*		*0.00*		*0.00*		*0.00*		*0.03*		*0.00*		*0.00*
Weighted base:		70		5		6		13		33		12		1
Sample:		93		3		5		13		61		10		1
To visit bars / pubs														
At least 5 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	2.9%	2	0.0%	0	0.0%	0	0.0%	0	6.1%	2	0.0%	0	0.0%	0
Once a week	3.4%	2	0.0%	0	0.0%	0	8.2%	1	4.1%	1	0.0%	0	0.0%	0
Once a fortnight	1.3%	1	0.0%	0	9.3%	1	0.0%	0	1.1%	0	0.0%	0	0.0%	0
At least once a month	1.5%	1	0.0%	0	0.0%	0	0.0%	0	3.2%	1	0.0%	0	0.0%	0
Less often	7.6%	5	38.4%	2	0.0%	0	8.2%	1	4.0%	1	9.2%	1	0.0%	0
Never	83.3%	58	61.6%	3	90.7%	5	83.5%	11	81.6%	27	90.8%	11	100.0%	1
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.14*		*0.04*		*0.05*		*0.09*		*0.24*		*0.01*		*0.00*
Weighted base:		70		5		6		13		33		12		1
Sample:		93		3		5		13		61		10		1
To visit cafes / coffee shops														
At least 5 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	7.0%	5	38.5%	2	45.7%	3	0.0%	0	1.1%	0	0.0%	0	0.0%	0
Once a fortnight	0.8%	1	0.0%	0	9.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
At least once a month	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.9%	1	0.0%	0
Less often	2.5%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	1	9.2%	1	0.0%	0
Never	88.1%	62	61.5%	3	45.1%	3	100.0%	13	96.9%	32	81.9%	10	100.0%	1
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.08*		*0.39*		*0.50*		*0.00*		*0.01*		*0.04*		*0.00*
Weighted base:		70		5		6		13		33		12		1
Sample:		93		3		5		13		61		10		1
To visit restaurants														
At least 5 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	4.5%	3	0.0%	0	17.4%	1	8.2%	1	3.2%	1	0.0%	0	0.0%	0
Once a fortnight	2.3%	2	0.0%	0	9.3%	1	0.0%	0	3.2%	1	0.0%	0	0.0%	0
At least once a month	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less often	2.6%	2	38.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Never	90.5%	64	61.6%	3	73.3%	4	91.8%	12	93.6%	31	100.0%	12	100.0%	1
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.06*		*0.04*		*0.22*		*0.08*		*0.05*		*0.00*		*0.00*
Weighted base:		70		5		6		13		33		12		1
Sample:		93		3		5		13		61		10		1
For work														
At least 5 times a week	8.4%	6	0.0%	0	45.1%	3	0.0%	0	5.9%	2	0.0%	0	100.0%	1
2-4 times a week	3.1%	2	0.0%	0	0.0%	0	8.2%	1	0.0%	0	9.2%	1	0.0%	0
Once a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a fortnight	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
At least once a month	4.1%	3	38.4%	2	0.0%	0	0.0%	0	3.2%	1	0.0%	0	0.0%	0
Less often	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Never	84.4%	59	61.6%	3	54.9%	3	91.8%	12	90.9%	30	90.8%	11	0.0%	0
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.53*		*0.12*		*2.25*		*0.25*		*0.31*		*0.28*		*5.00*
Weighted base:		70		5		6		13		33		12		1
Sample:		93		3		5		13		61		10		1

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	

Mean score: [Very poor = 1, Poor = 2, Neither = 0, Good = 1, Very good = 2]

Q39 Thinking about Blaina town centre, how do you rate the town centre for the following facilities on a scale of 1 - 5 (where 1 is very poor and 5 is very good)? [PR]
Blaina at least monthly at Q35

The range and quality of shops

1 Very poor	43.5%	31	0.0%	0	45.6%	3	31.3%	4	53.7%	18	38.9%	5	100.0%	1
2 Poor	29.1%	20	0.0%	0	28.2%	2	34.7%	4	22.6%	8	56.2%	7	0.0%	0
3 Neither good nor poor	21.7%	15	76.9%	4	26.2%	2	29.5%	4	18.5%	6	0.0%	0	0.0%	0
4 Good	4.2%	3	23.1%	1	0.0%	0	4.5%	1	2.1%	1	4.9%	1	0.0%	0
5 Very good	1.4%	1	0.0%	0	0.0%	0	0.0%	0	3.1%	1	0.0%	0	0.0%	0
Mean:		*1.91*		*3.23*		*1.81*		*2.07*		*1.78*		*1.71*		*1.00*
Weighted base:		70		5		6		13		33		12		1
Sample:		93		3		5		13		61		10		1

The range and quality of places to eat and drink

1 Very poor	49.0%	34	0.0%	0	28.2%	2	52.2%	7	65.7%	22	24.1%	3	100.0%	1
2 Poor	23.9%	17	76.9%	4	17.4%	1	13.8%	2	12.4%	4	51.3%	6	0.0%	0
3 Neither good nor poor	21.8%	15	23.1%	1	54.4%	3	25.8%	3	15.6%	5	19.7%	2	0.0%	0
4 Good	2.0%	1	0.0%	0	0.0%	0	8.2%	1	1.1%	0	0.0%	0	0.0%	0
5 Very good	3.3%	2	0.0%	0	0.0%	0	0.0%	0	5.2%	2	4.9%	1	0.0%	0
Mean:		*1.87*		*2.23*		*2.26*		*1.90*		*1.68*		*2.10*		*1.00*
Weighted base:		70		5		6		13		33		12		1
Sample:		93		3		5		13		61		10		1

The availability of car parking

1 Very poor	22.0%	15	0.0%	0	0.0%	0	8.5%	1	27.6%	9	33.0%	4	100.0%	1
2 Poor	20.0%	14	38.4%	2	9.3%	1	40.2%	5	14.4%	5	14.1%	2	0.0%	0
3 Neither good nor poor	24.5%	17	0.0%	0	73.3%	4	25.0%	3	18.0%	6	29.7%	4	0.0%	0
4 Good	16.7%	12	38.5%	2	17.4%	1	4.5%	1	21.6%	7	9.2%	1	0.0%	0
5 Very good	16.7%	12	23.1%	1	0.0%	0	21.8%	3	18.4%	6	14.1%	2	0.0%	0
Mean:		*2.86*		*3.46*		*3.08*		*2.91*		*2.89*		*2.57*		*1.00*
Weighted base:		70		5		6		13		33		12		1
Sample:		93		3		5		13		61		10		1

The ease of moving around the centre

1 Very poor	7.8%	5	0.0%	0	0.0%	0	0.0%	0	9.4%	3	9.2%	1	100.0%	1
2 Poor	21.2%	15	38.4%	2	28.2%	2	16.7%	2	15.7%	5	33.0%	4	0.0%	0
3 Neither good nor poor	22.2%	16	0.0%	0	26.2%	2	38.7%	5	16.3%	5	29.7%	4	0.0%	0
4 Good	30.0%	21	38.5%	2	45.6%	3	18.3%	2	34.0%	11	23.3%	3	0.0%	0
5 Very good	18.9%	13	23.1%	1	0.0%	0	26.3%	3	24.6%	8	4.9%	1	0.0%	0
Mean:		*3.31*		*3.46*		*3.17*		*3.54*		*3.49*		*2.82*		*1.00*
Weighted base:		70		5		6		13		33		12		1
Sample:		93		3		5		13		61		10		1

The attractiveness and overall experience of visiting the centre

1 Very poor	45.2%	32	0.0%	0	45.6%	3	31.0%	4	57.6%	19	38.1%	5	100.0%	1
2 Poor	25.6%	18	0.0%	0	0.0%	0	51.7%	7	25.7%	9	23.0%	3	0.0%	0
3 Neither good nor poor	19.1%	13	100.0%	5	16.9%	1	4.5%	1	7.1%	2	38.9%	5	0.0%	0
4 Good	7.0%	5	0.0%	0	28.2%	2	8.2%	1	6.4%	2	0.0%	0	0.0%	0
5 Very good	3.2%	2	0.0%	0	9.3%	1	4.5%	1	3.2%	1	0.0%	0	0.0%	0
Mean:		*1.97*		*3.00*		*2.56*		*2.04*		*1.72*		*2.01*		*1.00*
Weighted base:		70		5		6		13		33		12		1
Sample:		93		3		5		13		61		10		1

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	

Mean score: [Number of visits per week]

Q40 When you visit Brynmawr town centre or Lakeside Retail Park, how frequently do you undertake the following activities? [PR]
Brynmawr or Lakeside Retail Park at least monthly at Q35

Food or Non-food shopping in Brynmawr town centre

At least 5 times a week	2.3%	7	5.0%	2	3.3%	2	4.4%	4	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	11.6%	37	0.0%	0	13.1%	7	19.8%	17	8.6%	3	8.2%	7	13.1%	3
Once a week	19.5%	62	12.4%	5	17.1%	9	38.1%	33	19.2%	7	10.5%	9	2.7%	1
Once a fortnight	8.0%	26	10.6%	4	10.0%	5	5.1%	4	11.8%	4	6.2%	5	10.7%	3
At least once a month	12.5%	40	16.0%	6	11.6%	6	11.4%	10	15.7%	5	8.8%	8	21.0%	5
Less often	8.1%	26	7.6%	3	7.0%	4	3.2%	3	14.9%	5	13.6%	12	0.0%	0
Never	37.0%	118	43.5%	16	37.9%	20	17.9%	15	29.8%	10	50.7%	44	52.6%	13
(Don't know / varies)	1.1%	4	5.0%	2	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0
Mean:		*0.75*		*0.51*		*0.82*		*1.26*		*0.57*		*0.43*		*0.54*
Weighted base:		320		37		52		85		35		87		25
Sample:		322		32		44		92		62		75		17

Food or Non-food shopping at the Lakeside Retail Park

At least 5 times a week	4.7%	15	5.0%	2	9.6%	5	7.7%	7	0.0%	0	2.1%	2	0.0%	0
2-4 times a week	23.4%	75	6.6%	2	18.1%	9	44.1%	38	16.7%	6	17.9%	16	16.1%	4
Once a week	35.3%	113	29.7%	11	26.7%	14	33.5%	29	51.7%	18	39.9%	35	28.6%	7
Once a fortnight	16.2%	52	15.6%	6	26.9%	14	6.0%	5	13.8%	5	23.3%	20	7.7%	2
At least once a month	13.3%	42	32.1%	12	12.5%	6	5.9%	5	7.7%	3	11.4%	10	26.1%	7
Less often	4.5%	15	10.9%	4	4.0%	2	2.1%	2	1.0%	0	2.6%	2	16.1%	4
Never	2.1%	7	0.0%	0	2.2%	1	0.7%	1	9.1%	3	0.7%	1	5.3%	1
(Don't know / varies)	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0
Mean:		*1.42*		*0.93*		*1.47*		*2.09*		*1.11*		*1.22*		*0.90*
Weighted base:		320		37		52		85		35		87		25
Sample:		322		32		44		92		62		75		17

Visit Financial and Business Services

At least 5 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	1.1%	3	5.0%	2	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Once a week	6.0%	19	4.6%	2	0.0%	0	16.4%	14	1.9%	1	3.4%	3	0.0%	0
Once a fortnight	1.9%	6	0.0%	0	1.1%	1	4.0%	3	0.0%	0	0.0%	0	8.1%	2
At least once a month	5.7%	18	8.0%	3	0.0%	0	9.9%	8	9.8%	3	2.7%	2	5.0%	1
Less often	4.3%	14	0.0%	0	3.3%	2	5.9%	5	2.0%	1	7.5%	6	0.0%	0
Never	79.8%	256	82.4%	30	95.6%	49	59.8%	51	86.3%	30	84.3%	73	86.9%	22
(Don't know / varies)	1.1%	4	0.0%	0	0.0%	0	2.1%	2	0.0%	0	2.1%	2	0.0%	0
Mean:		*0.13*		*0.22*		*0.01*		*0.28*		*0.05*		*0.05*		*0.06*
Weighted base:		320		37		52		85		35		87		25
Sample:		322		32		44		92		62		75		17

Visit other service providers such as hairdressers / barbers, beauty salons or travel agents

At least 5 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	2.0%	6	1.6%	1	0.0%	0	4.8%	4	0.0%	0	2.1%	2	0.0%	0
Once a fortnight	2.2%	7	5.0%	2	4.4%	2	1.2%	1	0.0%	0	2.1%	2	0.0%	0
At least once a month	10.4%	33	12.7%	5	5.2%	3	28.4%	24	4.9%	2	0.0%	0	0.0%	0
Less often	11.0%	35	6.0%	2	16.2%	8	21.8%	19	6.0%	2	0.7%	1	13.1%	3
Never	73.1%	234	74.7%	28	74.2%	38	41.7%	36	87.2%	30	93.1%	81	86.9%	22
(Don't know / varies)	1.3%	4	0.0%	0	0.0%	0	2.1%	2	1.9%	1	2.1%	2	0.0%	0
Mean:		*0.07*		*0.09*		*0.05*		*0.17*		*0.02*		*0.03*		*0.01*
Weighted base:		320		37		52		85		35		87		25
Sample:		322		32		44		92		62		75		17

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Sports, health & fitness facilities														
At least 5 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	1.5%	5	5.0%	2	0.0%	0	3.4%	3	0.0%	0	0.0%	0	0.0%	0
Once a week	1.0%	3	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	8.1%	2
Once a fortnight	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
At least once a month	0.8%	2	5.0%	2	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0
Less often	1.3%	4	0.0%	0	2.0%	1	3.2%	3	1.0%	0	0.0%	0	0.0%	0
Never	94.4%	302	90.0%	33	98.0%	51	90.1%	77	97.1%	34	97.9%	85	91.9%	23
(Don't know / varies)	1.1%	4	0.0%	0	0.0%	0	2.1%	2	0.0%	0	2.1%	2	0.0%	0
Mean:		*0.06*		*0.17*		*0.00*		*0.12*		*0.01*		*0.00*		*0.08*
Weighted base:		320		37		52		85		35		87		25
Sample:		322		32		44		92		62		75		17
To visit bars / pubs														
At least 5 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	2.6%	8	8.1%	3	0.0%	0	4.0%	3	0.0%	0	2.1%	2	0.0%	0
Once a week	4.3%	14	5.0%	2	5.2%	3	10.0%	9	2.0%	1	0.0%	0	0.0%	0
Once a fortnight	3.6%	12	10.0%	4	2.0%	1	5.7%	5	6.0%	2	0.0%	0	0.0%	0
At least once a month	8.1%	26	16.1%	6	5.4%	3	10.4%	9	4.8%	2	5.4%	5	8.1%	2
Less often	8.0%	26	4.6%	2	15.8%	8	7.9%	7	6.0%	2	5.2%	5	10.0%	3
Never	72.3%	232	56.2%	21	71.6%	37	59.9%	51	81.3%	28	85.3%	74	81.9%	21
(Don't know / varies)	1.1%	4	0.0%	0	0.0%	0	2.1%	2	0.0%	0	2.1%	2	0.0%	0
Mean:		*0.17*		*0.40*		*0.09*		*0.30*		*0.07*		*0.09*		*0.03*
Weighted base:		320		37		52		85		35		87		25
Sample:		322		32		44		92		62		75		17
To visit cafes / coffee shops														
At least 5 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	1.8%	6	5.0%	2	1.1%	1	3.9%	3	0.0%	0	0.0%	0	0.0%	0
Once a week	3.2%	10	9.2%	3	0.0%	0	5.5%	5	1.0%	0	2.0%	2	0.0%	0
Once a fortnight	2.6%	8	6.6%	2	2.0%	1	4.5%	4	1.0%	0	0.7%	1	0.0%	0
At least once a month	4.1%	13	5.0%	2	0.0%	0	4.7%	4	3.8%	1	5.4%	5	5.0%	1
Less often	5.6%	18	1.6%	1	13.8%	7	4.7%	4	1.9%	1	4.8%	4	5.0%	1
Never	81.2%	260	72.6%	27	83.1%	43	72.5%	62	92.3%	32	85.1%	74	90.0%	23
(Don't know / varies)	1.7%	5	0.0%	0	0.0%	0	4.1%	4	0.0%	0	2.1%	2	0.0%	0
Mean:		*0.12*		*0.29*		*0.06*		*0.22*		*0.03*		*0.05*		*0.02*
Weighted base:		320		37		52		85		35		87		25
Sample:		322		32		44		92		62		75		17
To visit restaurants														
At least 5 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	0.3%	1	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	2.9%	9	5.0%	2	3.3%	2	4.6%	4	0.0%	0	2.1%	2	0.0%	0
Once a fortnight	4.8%	15	16.6%	6	4.0%	2	6.6%	6	4.1%	1	0.0%	0	0.0%	0
At least once a month	9.5%	30	8.0%	3	7.6%	4	8.5%	7	6.7%	2	15.4%	13	2.7%	1
Less often	7.0%	22	7.6%	3	7.3%	4	4.0%	3	8.1%	3	9.8%	8	5.0%	1
Never	74.4%	238	59.8%	22	77.8%	40	74.3%	63	81.1%	28	70.7%	61	92.3%	23
(Don't know / varies)	1.1%	4	0.0%	0	0.0%	0	2.1%	2	0.0%	0	2.1%	2	0.0%	0
Mean:		*0.10*		*0.25*		*0.08*		*0.11*		*0.05*		*0.08*		*0.01*
Weighted base:		320		37		52		85		35		87		25
Sample:		322		32		44		92		62		75		17
For work														
At least 5 times a week	4.8%	15	0.0%	0	3.3%	2	5.0%	4	0.0%	0	9.5%	8	4.8%	1
2-4 times a week	2.7%	9	0.0%	0	3.3%	2	5.8%	5	0.0%	0	0.0%	0	8.1%	2
Once a week	0.3%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Once a fortnight	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.1%	2
At least once a month	2.4%	8	10.0%	4	3.3%	2	0.0%	0	1.9%	1	2.1%	2	0.0%	0
Less often	0.8%	3	3.0%	1	3.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Never	86.8%	278	87.0%	32	87.1%	45	85.8%	73	98.1%	34	85.1%	74	79.0%	20
(Don't know / varies)	1.5%	5	0.0%	0	0.0%	0	2.1%	2	0.0%	0	3.3%	3	0.0%	0
Mean:		*0.34*		*0.03*		*0.28*		*0.45*		*0.01*		*0.50*		*0.53*
Weighted base:		320		37		52		85		35		87		25
Sample:		322		32		44		92		62		75		17

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	

Mean score: [Very poor = 1, Poor = 2, Neither = 0, Good = 1, Very good = 2]

Q41 Thinking about Brynmawr town centre or Lakeside Retail Park, how do you rate the town centre / retail park for the following facilities on a scale of 1 - 5 (where 1 is very poor and 5 is very good)? [PR]
Brynmawr or Lakeside Retail Park at least monthly at Q35

The range and quality of shops

1 Very poor	5.2%	17	4.6%	2	6.4%	3	6.5%	6	5.0%	2	0.7%	1	15.6%	4
2 Poor	15.7%	50	5.0%	2	21.2%	11	14.3%	12	11.8%	4	11.4%	10	44.9%	11
3 Neither good nor poor	39.6%	127	31.2%	12	34.6%	18	52.0%	44	39.2%	14	42.6%	37	10.7%	3
4 Good	27.3%	88	45.0%	17	31.6%	16	12.8%	11	28.8%	10	33.0%	29	20.7%	5
5 Very good	12.1%	39	14.1%	5	6.3%	3	14.5%	12	15.2%	5	12.3%	11	8.1%	2
Mean:		*3.25*		*3.59*		*3.10*		*3.14*		*3.38*		*3.45*		*2.61*
Weighted base:		320		37		52		85		35		87		25
Sample:		322		32		44		92		62		75		17

The range and quality of places to eat and drink

1 Very poor	16.7%	53	7.6%	3	17.1%	9	17.9%	15	21.5%	7	16.0%	14	20.6%	5
2 Poor	28.1%	90	32.6%	12	39.0%	20	23.4%	20	11.5%	4	27.6%	24	39.2%	10
3 Neither good nor poor	36.4%	117	30.7%	11	25.2%	13	40.6%	35	47.8%	17	43.6%	38	13.4%	3
4 Good	14.2%	46	29.1%	11	13.4%	7	10.6%	9	10.1%	3	12.2%	11	18.8%	5
5 Very good	4.6%	15	0.0%	0	5.2%	3	7.4%	6	9.1%	3	0.7%	1	8.1%	2
Mean:		*2.62*		*2.81*		*2.51*		*2.66*		*2.74*		*2.54*		*2.55*
Weighted base:		320		37		52		85		35		87		25
Sample:		322		32		44		92		62		75		17

The availability of car parking

1 Very poor	10.1%	32	9.0%	3	6.6%	3	11.2%	10	9.1%	3	7.4%	6	26.0%	7
2 Poor	17.5%	56	21.0%	8	20.4%	11	22.9%	20	18.6%	6	13.0%	11	2.7%	1
3 Neither good nor poor	26.3%	84	6.4%	2	16.0%	8	35.5%	30	26.6%	9	30.0%	26	31.9%	8
4 Good	24.7%	79	33.4%	12	21.4%	11	19.9%	17	16.7%	6	32.7%	28	18.8%	5
5 Very good	21.3%	68	30.3%	11	35.6%	18	10.5%	9	29.0%	10	16.9%	15	20.7%	5
Mean:		*3.30*		*3.55*		*3.59*		*2.96*		*3.38*		*3.39*		*3.06*
Weighted base:		320		37		52		85		35		87		25
Sample:		322		32		44		92		62		75		17

The ease of moving around the centre

1 Very poor	2.8%	9	3.0%	1	0.0%	0	3.8%	3	5.9%	2	1.4%	1	4.8%	1
2 Poor	8.3%	27	12.6%	5	11.8%	6	10.6%	9	4.0%	1	3.9%	3	8.1%	2
3 Neither good nor poor	33.3%	107	15.6%	6	30.5%	16	32.6%	28	37.1%	13	43.6%	38	26.5%	7
4 Good	34.1%	109	36.5%	13	28.2%	15	35.0%	30	24.8%	9	36.2%	31	44.9%	11
5 Very good	21.6%	69	32.3%	12	29.5%	15	18.1%	15	28.3%	10	14.9%	13	15.7%	4
Mean:		*3.64*		*3.82*		*3.76*		*3.53*		*3.66*		*3.60*		*3.59*
Weighted base:		320		37		52		85		35		87		25
Sample:		322		32		44		92		62		75		17

The attractiveness and overall experience of visiting the centre

1 Very poor	8.0%	26	3.0%	1	0.0%	0	8.0%	7	8.8%	3	7.8%	7	31.3%	8
2 Poor	17.5%	56	10.6%	4	13.6%	7	22.3%	19	15.5%	5	21.4%	19	8.1%	2
3 Neither good nor poor	40.1%	128	38.3%	14	45.4%	23	47.2%	40	35.7%	12	36.5%	32	26.1%	7
4 Good	24.3%	78	35.4%	13	32.6%	17	11.8%	10	30.8%	11	24.7%	21	23.8%	6
5 Very good	10.1%	32	12.7%	5	8.4%	4	10.8%	9	9.2%	3	9.6%	8	10.7%	3
Mean:		*3.11*		*3.44*		*3.36*		*2.95*		*3.16*		*3.07*		*2.75*
Weighted base:		320		37		52		85		35		87		25
Sample:		322		32		44		92		62		75		17

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Mean score: [Number of visits per week]														
Q42 When you visit Ebbw Vale town centre, how frequently do you undertake the following activities? [PR] *Ebbw Vale at least monthly at Q35*														
Food or Non-food Shopping														
At least 5 times a week	3.2%	11	4.0%	4	6.1%	5	1.2%	1	0.0%	0	3.8%	2	0.0%	0
2-4 times a week	20.0%	71	41.5%	42	21.4%	18	5.8%	3	0.0%	0	6.3%	3	9.5%	6
Once a week	36.5%	130	31.8%	32	43.8%	36	41.5%	19	26.8%	4	28.2%	13	39.4%	24
Once a fortnight	13.2%	47	13.4%	14	11.8%	10	11.1%	5	11.6%	2	16.2%	8	14.6%	9
At least once a month	13.2%	47	0.0%	0	7.3%	6	21.3%	10	22.3%	4	29.4%	14	22.0%	14
Less often	6.2%	22	5.2%	5	5.0%	4	3.6%	2	18.7%	3	9.9%	5	5.2%	3
Never	6.3%	23	4.0%	4	4.7%	4	11.8%	6	20.6%	3	2.5%	1	7.3%	5
(Don't know / varies)	1.3%	5	0.0%	0	0.0%	0	3.8%	2	0.0%	0	3.8%	2	2.0%	1
Mean:		*1.25*		*1.84*		*1.47*		*0.80*		*0.41*		*0.87*		*0.84*
Weighted base:		357		102		83		47		17		47		62
Sample:		352		97		83		49		30		41		52
Visit Financial and Business Services														
At least 5 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	4.0%	14	7.5%	8	7.2%	6	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Once a week	14.9%	53	21.6%	22	25.8%	21	5.0%	2	6.4%	1	5.9%	3	6.3%	4
Once a fortnight	5.6%	20	6.4%	6	5.1%	4	2.5%	1	3.8%	1	16.0%	8	0.0%	0
At least once a month	12.8%	46	13.2%	13	14.8%	12	12.2%	6	16.2%	3	10.8%	5	10.4%	6
Less often	9.2%	33	10.1%	10	8.4%	7	13.0%	6	10.1%	2	12.4%	6	3.0%	2
Never	51.7%	185	38.2%	39	38.7%	32	63.6%	30	63.4%	11	51.0%	24	79.2%	49
(Don't know / varies)	1.9%	7	3.0%	3	0.0%	0	3.8%	2	0.0%	0	3.8%	2	0.0%	0
Mean:		*0.35*		*0.54*		*0.55*		*0.12*		*0.14*		*0.19*		*0.13*
Weighted base:		357		102		83		47		17		47		62
Sample:		352		97		83		49		30		41		52
Visit other service providers such as hairdressers / barbers, beauty salons or travel agents														
At least 5 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	1.3%	5	1.8%	2	2.7%	2	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Once a fortnight	3.0%	11	5.9%	6	5.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
At least once a month	12.3%	44	23.2%	24	15.7%	13	0.0%	0	10.2%	2	3.8%	2	6.4%	4
Less often	13.1%	47	18.1%	18	19.2%	16	12.9%	6	16.2%	3	1.3%	1	5.1%	3
Never	68.7%	246	49.2%	50	56.6%	47	83.3%	39	73.5%	12	89.9%	42	88.5%	55
(Don't know / varies)	1.5%	5	1.8%	2	0.0%	0	3.8%	2	0.0%	0	3.8%	2	0.0%	0
Mean:		*0.08*		*0.14*		*0.12*		*0.01*		*0.05*		*0.03*		*0.02*
Weighted base:		357		102		83		47		17		47		62
Sample:		352		97		83		49		30		41		52
Sports, health & fitness facilities														
At least 5 times a week	2.0%	7	2.8%	3	5.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	3.0%	11	3.6%	4	6.0%	5	4.5%	2	0.0%	0	0.0%	0	0.0%	0
Once a week	4.5%	16	3.3%	3	5.2%	4	2.3%	1	6.4%	1	7.6%	4	4.4%	3
Once a fortnight	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	2.0%	1
At least once a month	4.6%	16	7.2%	7	1.2%	1	7.5%	4	3.8%	1	3.8%	2	3.3%	2
Less often	1.8%	7	1.2%	1	4.5%	4	1.2%	1	2.1%	0	0.0%	0	1.1%	1
Never	82.0%	293	80.1%	81	77.7%	64	80.7%	38	87.7%	15	83.6%	39	89.2%	55
(Don't know / varies)	1.5%	5	1.8%	2	0.0%	0	3.8%	2	0.0%	0	3.8%	2	0.0%	0
Mean:		*0.26*		*0.31*		*0.51*		*0.19*		*0.08*		*0.10*		*0.07*
Weighted base:		357		102		83		47		17		47		62
Sample:		352		97		83		49		30		41		52

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
To visit bars / pubs														
At least 5 times a week	0.5%	2	1.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	2.1%	7	2.9%	3	5.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	7.5%	27	9.8%	10	12.4%	10	2.5%	1	0.0%	0	1.3%	1	7.5%	5
Once a fortnight	5.1%	18	6.0%	6	7.8%	6	3.8%	2	0.0%	0	0.0%	0	6.3%	4
At least once a month	6.2%	22	10.5%	11	4.0%	3	7.3%	3	3.8%	1	6.1%	3	2.0%	1
Less often	9.1%	32	13.3%	14	12.2%	10	3.5%	2	4.2%	1	12.1%	6	1.1%	1
Never	68.6%	245	56.3%	57	57.6%	48	79.2%	37	92.0%	15	76.7%	36	83.1%	52
(Don't know / varies)	1.0%	4	0.0%	0	0.0%	0	3.8%	2	0.0%	0	3.8%	2	0.0%	0
Mean:		*0.22*		*0.32*		*0.38*		*0.07*		*0.02*		*0.05*		*0.11*
Weighted base:		357		102		83		47		17		47		62
Sample:		352		97		83		49		30		41		52
To visit cafes / coffee shops														
At least 5 times a week	0.5%	2	0.0%	0	1.3%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	2.9%	10	4.8%	5	6.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	9.7%	35	16.5%	17	7.3%	6	1.2%	1	8.5%	1	8.6%	4	9.4%	6
Once a fortnight	4.4%	16	3.3%	3	5.3%	4	0.0%	0	8.2%	1	4.8%	2	7.2%	4
At least once a month	5.7%	20	7.4%	8	3.1%	3	6.2%	3	3.8%	1	2.5%	1	8.7%	5
Less often	4.9%	18	4.6%	5	7.5%	6	3.5%	2	4.2%	1	0.0%	0	7.0%	4
Never	70.4%	251	61.5%	63	69.0%	57	84.0%	39	75.3%	13	80.3%	38	67.6%	42
(Don't know / varies)	1.5%	5	1.8%	2	0.0%	0	3.8%	2	0.0%	0	3.8%	2	0.0%	0
Mean:		*0.26*		*0.36*		*0.38*		*0.10*		*0.14*		*0.12*		*0.16*
Weighted base:		357		102		83		47		17		47		62
Sample:		352		97		83		49		30		41		52
To visit restaurants														
At least 5 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	3.3%	12	5.3%	5	3.1%	3	0.0%	0	0.0%	0	3.8%	2	3.3%	2
Once a week	4.0%	14	7.7%	8	3.3%	3	1.2%	1	0.0%	0	0.0%	0	5.3%	3
Once a fortnight	3.5%	12	3.3%	3	3.1%	3	2.3%	1	2.1%	0	2.3%	1	6.3%	4
At least once a month	6.6%	23	6.5%	7	6.6%	5	7.3%	3	0.0%	0	9.9%	5	5.3%	3
Less often	7.0%	25	9.2%	9	10.1%	8	0.0%	0	4.2%	1	9.9%	5	3.0%	2
Never	74.2%	265	66.2%	67	73.7%	61	85.5%	40	93.7%	16	70.4%	33	76.8%	48
(Don't know / varies)	1.5%	5	1.8%	2	0.0%	0	3.8%	2	0.0%	0	3.8%	2	0.0%	0
Mean:		*0.19*		*0.29*		*0.17*		*0.05*		*0.02*		*0.17*		*0.20*
Weighted base:		357		102		83		47		17		47		62
Sample:		352		97		83		49		30		41		52
For work														
At least 5 times a week	7.6%	27	9.2%	9	7.5%	6	2.3%	1	10.3%	2	7.6%	4	8.6%	5
2-4 times a week	2.7%	10	1.8%	2	3.3%	3	4.5%	2	0.0%	0	4.6%	2	1.1%	1
Once a week	1.7%	6	1.8%	2	2.0%	2	0.0%	0	3.9%	1	3.8%	2	0.0%	0
Once a fortnight	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
At least once a month	1.0%	3	1.1%	1	0.0%	0	5.0%	2	0.0%	0	0.0%	0	0.0%	0
Less often	0.9%	3	1.1%	1	1.3%	1	0.0%	0	2.1%	0	0.0%	0	1.1%	1
Never	84.1%	300	83.2%	85	85.9%	71	82.2%	39	83.6%	14	77.9%	37	89.2%	55
(Don't know / varies)	2.1%	8	1.8%	2	0.0%	0	6.0%	3	0.0%	0	6.1%	3	0.0%	0
Mean:		*0.49*		*0.54*		*0.49*		*0.28*		*0.56*		*0.59*		*0.46*
Weighted base:		357		102		83		47		17		47		62
Sample:		352		97		83		49		30		41		52

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	

Mean score: [Very poor = 1, Poor = 2, Neither = 0, Good = 1, Very good = 2]

Q43 Thinking about Ebbw Vale town centre, how do you rate the town centre for the following facilities on a scale of 1 - 5 (where 1 is very poor and 5 is very good)? [PR]
Ebbw Vale at least monthly at Q35

The range and quality of shops

1 Very poor	13.0%	46	20.0%	20	18.1%	15	7.5%	4	6.0%	1	0.0%	0	10.6%	7
2 Poor	22.3%	80	29.7%	30	33.8%	28	14.3%	7	12.1%	2	0.0%	0	20.5%	13
3 Neither good nor poor	40.3%	144	34.0%	35	31.1%	26	41.9%	20	38.0%	6	54.1%	25	51.9%	32
4 Good	18.1%	65	10.1%	10	13.9%	11	33.8%	16	31.4%	5	32.4%	15	10.6%	7
5 Very good	6.3%	23	6.3%	6	3.2%	3	2.5%	1	12.4%	2	13.5%	6	6.4%	4
Mean:		*2.83*		*2.53*		*2.50*		*3.10*		*3.32*		*3.59*		*2.82*
Weighted base:		357		102		83		47		17		47		62
Sample:		352		97		83		49		30		41		52

The range and quality of places to eat and drink

1 Very poor	12.8%	46	16.2%	16	20.7%	17	9.8%	5	9.9%	2	0.0%	0	9.6%	6
2 Poor	27.0%	96	37.4%	38	31.9%	26	12.9%	6	14.1%	2	7.3%	3	32.5%	20
3 Neither good nor poor	40.3%	144	29.7%	30	24.4%	20	56.7%	27	50.9%	9	71.6%	34	40.0%	25
4 Good	11.9%	43	8.0%	8	15.9%	13	16.8%	8	14.8%	2	11.2%	5	9.3%	6
5 Very good	7.9%	28	8.7%	9	7.2%	6	3.7%	2	10.3%	2	9.9%	5	8.5%	5
Mean:		*2.75*		*2.56*		*2.57*		*2.92*		*3.02*		*3.24*		*2.75*
Weighted base:		357		102		83		47		17		47		62
Sample:		352		97		83		49		30		41		52

The availability of car parking

1 Very poor	9.6%	34	11.6%	12	8.1%	7	13.5%	6	16.0%	3	6.3%	3	6.3%	4
2 Poor	17.0%	61	20.9%	21	16.4%	14	9.4%	4	10.0%	2	9.7%	5	24.8%	15
3 Neither good nor poor	35.1%	126	27.6%	28	37.5%	31	37.3%	18	36.5%	6	54.6%	26	27.7%	17
4 Good	23.3%	83	16.6%	17	25.8%	21	33.8%	16	16.2%	3	19.6%	9	27.6%	17
5 Very good	14.9%	53	23.3%	24	12.2%	10	6.0%	3	21.3%	4	9.7%	5	13.6%	8
Mean:		*3.17*		*3.19*		*3.18*		*3.09*		*3.17*		*3.17*		*3.17*
Weighted base:		357		102		83		47		17		47		62
Sample:		352		97		83		49		30		41		52

The ease of moving around the centre

1 Very poor	1.1%	4	1.1%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	1
2 Poor	7.9%	28	6.3%	6	12.2%	10	9.6%	5	4.2%	1	0.0%	0	10.3%	6
3 Neither good nor poor	23.1%	82	20.2%	21	15.1%	12	31.2%	15	38.6%	6	35.8%	17	18.4%	11
4 Good	42.1%	150	38.8%	39	43.7%	36	41.2%	19	36.3%	6	48.2%	23	43.0%	27
5 Very good	25.8%	92	33.6%	34	27.0%	22	18.0%	8	20.9%	4	16.0%	8	26.3%	16
Mean:		*3.84*		*3.97*		*3.81*		*3.68*		*3.74*		*3.80*		*3.81*
Weighted base:		357		102		83		47		17		47		62
Sample:		352		97		83		49		30		41		52

The attractiveness and overall experience of visiting the centre

1 Very poor	8.9%	32	12.8%	13	13.7%	11	5.0%	2	10.0%	2	0.0%	0	5.3%	3
2 Poor	19.8%	71	22.0%	22	27.1%	22	15.7%	7	19.7%	3	7.4%	3	18.9%	12
3 Neither good nor poor	45.3%	162	39.9%	41	45.3%	37	49.2%	23	36.6%	6	52.6%	25	48.2%	30
4 Good	19.2%	69	20.2%	21	9.9%	8	27.6%	13	18.7%	3	25.2%	12	19.2%	12
5 Very good	6.8%	24	5.1%	5	3.9%	3	2.5%	1	14.9%	2	14.8%	7	8.4%	5
Mean:		*2.95*		*2.83*		*2.63*		*3.07*		*3.09*		*3.47*		*3.07*
Weighted base:		357		102		83		47		17		47		62
Sample:		352		97		83		49		30		41		52

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	

Mean score: [Number of visits per week]

Q44 When you visit Tredegar town centre, how frequently do you undertake the following activities? [PR]
Tredegar at least monthly at Q35

Food or Non-food Shopping

At least 5 times a week	8.7%	14	10.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.4%	12
2-4 times a week	28.1%	44	0.0%	0	17.6%	2	23.0%	1	0.0%	0	0.0%	0	33.1%	41
Once a week	35.6%	56	21.4%	4	26.9%	3	0.0%	0	0.0%	0	0.0%	0	39.8%	50
Once a fortnight	10.2%	16	13.6%	2	10.6%	1	0.0%	0	100.0%	1	0.0%	0	9.3%	12
At least once a month	9.6%	15	26.7%	5	16.4%	2	38.5%	2	0.0%	0	0.0%	0	5.7%	7
Less often	2.5%	4	16.7%	3	10.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Never	4.4%	7	10.8%	2	17.6%	2	0.0%	0	0.0%	0	0.0%	0	2.6%	3
(Don't know / varies)	1.1%	2	0.0%	0	0.0%	0	38.5%	2	0.0%	0	0.0%	0	0.0%	0
Mean:		*1.73*		*0.92*		*0.91*		*1.31*		*0.50*		*0.00*		*1.93*
Weighted base:		157		17		10		5		1		0		125
Sample:		136		17		9		3		1		0		106

Visit Financial and Business Services

At least 5 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	5.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	8
Once a week	12.7%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.0%	20
Once a fortnight	8.5%	13	0.0%	0	28.5%	3	0.0%	0	0.0%	0	0.0%	0	8.5%	11
At least once a month	5.1%	8	0.0%	0	10.6%	1	0.0%	0	0.0%	0	0.0%	0	5.6%	7
Less often	6.8%	11	0.0%	0	10.6%	1	0.0%	0	100.0%	1	0.0%	0	6.9%	9
Never	60.7%	95	100.0%	17	50.4%	5	61.5%	3	0.0%	0	0.0%	0	56.6%	70
(Don't know / varies)	1.1%	2	0.0%	0	0.0%	0	38.5%	2	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.35*		*0.00*		*0.19*		*0.00*		*0.10*		*0.00*		*0.42*
Weighted base:		157		17		10		5		1		0		125
Sample:		136		17		9		3		1		0		106

Visit other service providers such as hairdressers / barbers, beauty salons or travel agents

At least 5 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-4 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	2.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	4
Once a fortnight	5.5%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	9
At least once a month	16.2%	25	3.6%	1	5.8%	1	0.0%	0	0.0%	0	0.0%	0	19.5%	24
Less often	25.1%	39	17.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	29.3%	36
Never	49.3%	77	79.2%	14	94.2%	9	61.5%	3	100.0%	1	0.0%	0	40.8%	51
(Don't know / varies)	1.1%	2	0.0%	0	0.0%	0	38.5%	2	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.13*		*0.03*		*0.02*		*0.00*		*0.00*		*0.00*		*0.16*
Weighted base:		157		17		10		5		1		0		125
Sample:		136		17		9		3		1		0		106

Sports, health & fitness facilities

At least 5 times a week	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2
2-4 times a week	14.3%	22	0.0%	0	10.6%	1	0.0%	0	0.0%	0	0.0%	0	17.2%	21
Once a week	2.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	4
Once a fortnight	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
At least once a month	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2
Less often	3.5%	6	10.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4
Never	75.1%	118	89.2%	15	89.4%	9	61.5%	3	100.0%	1	0.0%	0	72.4%	90
(Don't know / varies)	1.1%	2	0.0%	0	0.0%	0	38.5%	2	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.54*		*0.01*		*0.32*		*0.00*		*0.00*		*0.00*		*0.64*
Weighted base:		157		17		10		5		1		0		125
Sample:		136		17		9		3		1		0		106

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
To visit bars / pubs														
At least 5 times a week	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
2-4 times a week	5.3%	8	0.0%	0	17.6%	2	0.0%	0	0.0%	0	0.0%	0	5.3%	7
Once a week	12.2%	19	0.0%	0	16.4%	2	0.0%	0	0.0%	0	0.0%	0	14.1%	18
Once a fortnight	13.3%	21	0.0%	0	0.0%	0	38.5%	2	0.0%	0	0.0%	0	15.3%	19
At least once a month	15.9%	25	21.6%	4	5.8%	1	0.0%	0	0.0%	0	0.0%	0	16.7%	21
Less often	10.0%	16	0.0%	0	10.6%	1	0.0%	0	100.0%	1	0.0%	0	10.9%	14
Never	41.7%	65	78.5%	13	49.6%	5	23.0%	1	0.0%	0	0.0%	0	37.1%	46
(Don't know / varies)	1.1%	2	0.0%	0	0.0%	0	38.5%	2	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.43*		*0.07*		*0.72*		*0.31*		*0.10*		*0.00*		*0.47*
Weighted base:		157		17		10		5		1		0		125
Sample:		136		17		9		3		1		0		106
To visit cafes / coffee shops														
At least 5 times a week	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
2-4 times a week	3.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	5
Once a week	5.8%	9	0.0%	0	5.8%	1	0.0%	0	0.0%	0	0.0%	0	6.9%	9
Once a fortnight	3.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	6
At least once a month	10.1%	16	21.6%	4	10.6%	1	0.0%	0	0.0%	0	0.0%	0	8.9%	11
Less often	8.5%	13	0.0%	0	10.6%	1	0.0%	0	100.0%	1	0.0%	0	9.0%	11
Never	66.6%	105	78.5%	13	73.1%	7	61.5%	3	0.0%	0	0.0%	0	65.3%	81
(Don't know / varies)	1.1%	2	0.0%	0	0.0%	0	38.5%	2	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.26*		*0.07*		*0.10*		*0.00*		*0.10*		*0.00*		*0.31*
Weighted base:		157		17		10		5		1		0		125
Sample:		136		17		9		3		1		0		106
To visit restaurants														
At least 5 times a week	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
2-4 times a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	4.0%	6	0.0%	0	16.4%	2	0.0%	0	0.0%	0	0.0%	0	3.8%	5
Once a fortnight	4.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	6
At least once a month	12.5%	20	21.6%	4	10.6%	1	0.0%	0	0.0%	0	0.0%	0	12.0%	15
Less often	12.0%	19	6.7%	1	10.6%	1	0.0%	0	0.0%	0	0.0%	0	13.4%	17
Never	65.5%	103	71.8%	12	62.5%	6	61.5%	3	100.0%	1	0.0%	0	64.8%	81
(Don't know / varies)	1.1%	2	0.0%	0	0.0%	0	38.5%	2	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.15*		*0.07*		*0.21*		*0.00*		*0.00*		*0.00*		*0.16*
Weighted base:		157		17		10		5		1		0		125
Sample:		136		17		9		3		1		0		106
For work														
At least 5 times a week	6.8%	11	21.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	7
2-4 times a week	2.0%	3	0.0%	0	0.0%	0	23.0%	1	0.0%	0	0.0%	0	1.6%	2
Once a week	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Once a fortnight	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2
At least once a month	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less often	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2
Never	86.7%	136	78.5%	13	100.0%	10	38.5%	2	100.0%	1	0.0%	0	88.5%	110
(Don't know / varies)	1.1%	2	0.0%	0	0.0%	0	38.5%	2	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.42*		*1.08*		*0.00*		*1.12*		*0.00*		*0.00*		*0.35*
Weighted base:		157		17		10		5		1		0		125
Sample:		136		17		9		3		1		0		106

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	

Mean score: [Very poor = 1, Poor = 2, Neither = 0, Good = 1, Very good = 2]

Q45 Thinking about Tredegar town centre, how do you rate the town centre for the following facilities on a scale of 1 - 5 (where 1 is very poor and 5 is very good)? [PR]
Tredegar at least monthly at Q35

The range and quality of shops

1 Very poor	25.3%	40	20.8%	4	5.8%	1	0.0%	0	0.0%	0	0.0%	0	28.6%	36
2 Poor	39.3%	62	20.7%	4	42.2%	4	0.0%	0	0.0%	0	0.0%	0	43.4%	54
3 Neither good nor poor	24.7%	39	41.0%	7	17.6%	2	100.0%	5	100.0%	1	0.0%	0	19.6%	24
4 Good	8.7%	14	17.5%	3	34.3%	3	0.0%	0	0.0%	0	0.0%	0	5.9%	7
5 Very good	2.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	3
Mean:		*2.23*		*2.55*		*2.81*		*3.00*		*3.00*		*0.00*		*2.10*
Weighted base:		157		17		10		5		1		0		125
Sample:		136		17		9		3		1		0		106

The range and quality of places to eat and drink

1 Very poor	9.8%	15	7.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.3%	14
2 Poor	28.6%	45	27.5%	5	21.1%	2	0.0%	0	0.0%	0	0.0%	0	30.6%	38
3 Neither good nor poor	34.1%	54	48.0%	8	52.0%	5	100.0%	5	0.0%	0	0.0%	0	28.7%	36
4 Good	22.8%	36	17.4%	3	16.4%	2	0.0%	0	100.0%	1	0.0%	0	24.2%	30
5 Very good	4.8%	8	0.0%	0	10.6%	1	0.0%	0	0.0%	0	0.0%	0	5.2%	7
Mean:		*2.84*		*2.76*		*3.16*		*3.00*		*4.00*		*0.00*		*2.81*
Weighted base:		157		17		10		5		1		0		125
Sample:		136		17		9		3		1		0		106

The availability of car parking

1 Very poor	1.2%	2	3.6%	1	5.8%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1
2 Poor	13.5%	21	17.3%	3	10.6%	1	0.0%	0	0.0%	0	0.0%	0	13.8%	17
3 Neither good nor poor	28.5%	45	38.1%	7	10.9%	1	77.0%	4	0.0%	0	0.0%	0	27.1%	34
4 Good	32.9%	52	20.3%	3	62.2%	6	23.0%	1	100.0%	1	0.0%	0	32.2%	40
5 Very good	23.8%	37	20.8%	4	10.6%	1	0.0%	0	0.0%	0	0.0%	0	26.3%	33
Mean:		*3.65*		*3.38*		*3.61*		*3.23*		*4.00*		*0.00*		*3.70*
Weighted base:		157		17		10		5		1		0		125
Sample:		136		17		9		3		1		0		106

The ease of moving around the centre

1 Very poor	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2 Poor	4.9%	8	6.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	7
3 Neither good nor poor	19.5%	31	24.6%	4	26.9%	3	38.5%	2	0.0%	0	0.0%	0	17.8%	22
4 Good	48.8%	77	61.8%	11	62.5%	6	61.5%	3	100.0%	1	0.0%	0	45.0%	56
5 Very good	26.8%	42	7.1%	1	10.6%	1	0.0%	0	0.0%	0	0.0%	0	32.0%	40
Mean:		*3.98*		*3.70*		*3.84*		*3.62*		*4.00*		*0.00*		*4.04*
Weighted base:		157		17		10		5		1		0		125
Sample:		136		17		9		3		1		0		106

The attractiveness and overall experience of visiting the centre

1 Very poor	22.0%	35	13.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.9%	32
2 Poor	26.8%	42	10.8%	2	16.4%	2	0.0%	0	0.0%	0	0.0%	0	31.0%	39
3 Neither good nor poor	35.8%	56	55.4%	9	55.4%	5	61.5%	3	0.0%	0	0.0%	0	30.9%	39
4 Good	11.4%	18	13.8%	2	28.2%	3	38.5%	2	100.0%	1	0.0%	0	8.0%	10
5 Very good	4.0%	6	6.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	5
Mean:		*2.49*		*2.89*		*3.12*		*3.39*		*4.00*		*0.00*		*2.33*
Weighted base:		157		17		10		5		1		0		125
Sample:		136		17		9		3		1		0		106

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
Q48 What are the main activities you undertake when you visit Cwmbran town centre? [MR] *Cwmbran at least monthly at Q35*														
Food or Non-food Shopping	97.9%	243	100.0%	31	91.4%	33	100.0%	41	92.3%	17	99.4%	94	100.0%	25
Visit Financial and Business Services	6.6%	16	1.9%	1	0.0%	0	2.6%	1	20.8%	4	11.3%	11	0.0%	0
Visit other service providers such as hairdressers / barbers, beauty salons or travel agents	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Public or medical services	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sports, health & fitness facilities	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2	0.0%	0
To visit bars / pubs	5.6%	14	3.6%	1	1.5%	1	1.4%	1	9.6%	2	10.5%	10	0.0%	0
To visit cafes / coffee shops	22.3%	55	24.3%	8	13.5%	5	13.2%	5	35.2%	7	29.7%	28	9.9%	3
To visit restaurants	24.3%	60	31.7%	10	29.2%	11	19.3%	8	29.8%	6	22.0%	21	20.9%	5
For work	3.5%	9	0.0%	0	2.8%	1	2.6%	1	11.5%	2	2.5%	2	8.0%	2
For business	0.4%	1	0.0%	0	0.0%	0	0.0%	0	5.8%	1	0.0%	0	0.0%	0
For education	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leisure (e.g. theatre, cinema, bowling)	8.8%	22	12.9%	4	13.7%	5	1.4%	1	5.4%	1	11.7%	11	0.0%	0
Visit family / friends	0.6%	2	0.0%	0	1.5%	1	0.0%	0	1.9%	0	0.6%	1	0.0%	0
Weighted base:		248		31		36		41		19		95		25
Sample:		233		29		32		39		32		82		19
Q49 What are the main activities you undertake when you visit Merthyr Tydfil town centre? [MR] *Merthyr Tydfil at least monthly at Q35*														
Food or Non-food Shopping	96.3%	146	91.2%	23	98.2%	31	100.0%	18	96.8%	11	100.0%	16	95.0%	47
Visit Financial and Business Services	8.6%	13	0.0%	0	10.2%	3	0.0%	0	18.9%	2	0.0%	0	15.5%	8
Visit other service providers such as hairdressers / barbers, beauty salons or travel agents	0.4%	1	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Public or medical services	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sports, health & fitness facilities	0.4%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
To visit bars / pubs	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1
To visit cafes / coffee shops	8.9%	14	6.8%	2	6.7%	2	21.3%	4	18.7%	2	0.0%	0	7.6%	4
To visit restaurants	11.6%	18	9.1%	2	20.4%	6	21.3%	4	22.6%	2	0.0%	0	5.0%	2
For work	8.8%	13	8.8%	2	0.0%	0	0.0%	0	9.7%	1	6.8%	1	18.1%	9
For business	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
For education	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leisure (e.g. theatre, cinema, bowling)	8.0%	12	0.0%	0	5.4%	2	9.8%	2	9.7%	1	11.0%	2	11.6%	6
Visit family / friends	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Market	1.4%	2	0.0%	0	3.5%	1	0.0%	0	3.2%	0	0.0%	0	1.3%	1
Weighted base:		152		25		32		18		11		16		50
Sample:		149		26		31		20		18		14		40
GEN Gender of respondent.														
Male	27.1%	173	20.0%	23	23.6%	24	27.4%	26	27.3%	12	28.6%	40	33.9%	48
Female	72.9%	464	80.0%	94	76.4%	76	72.6%	69	72.7%	33	71.4%	100	66.1%	93
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120
AGE Would you mind telling me how old you are?														
18 to 24	6.6%	42	6.3%	7	5.1%	5	1.9%	2	9.6%	4	5.1%	7	11.6%	16
25 to 34	14.5%	92	11.0%	13	13.6%	14	16.8%	16	12.0%	5	21.7%	30	10.1%	14
35 to 44	17.8%	114	17.3%	20	20.3%	20	11.2%	11	9.6%	4	24.2%	34	17.4%	24
45 to 54	18.1%	115	19.8%	23	19.3%	19	19.0%	18	17.2%	8	14.5%	20	19.1%	27
55 to 64	18.3%	116	22.3%	26	19.9%	20	19.6%	19	17.8%	8	14.2%	20	17.0%	24
65 +	24.7%	157	23.3%	27	21.8%	22	31.4%	30	33.9%	15	20.2%	28	24.8%	35
(Refused)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120

Column %ges.

	Total		Zone 1 - Ebbw Vale South		Zone 2 - Ebbw Vale North		Zone 3 - Brynmawr		Zone 4 - Blaina		Zone 5 - Abertillery		Zone 6 - Tredegar	
ADU How many adults, including yourself, live in your household (16 years and above)?														
One	19.9%	127	17.9%	21	23.6%	24	16.4%	15	25.7%	12	21.9%	31	17.3%	24
Two	51.5%	328	51.3%	60	58.9%	59	50.9%	48	46.8%	21	45.6%	64	54.1%	76
Three	18.8%	120	16.3%	19	11.1%	11	21.6%	20	16.5%	7	23.4%	33	20.7%	29
Four	4.0%	25	7.0%	8	2.1%	2	0.6%	1	6.2%	3	3.3%	5	5.1%	7
Five or more	1.2%	8	2.8%	3	1.0%	1	1.9%	2	0.0%	0	1.3%	2	0.0%	0
(Refused)	4.7%	30	4.7%	6	3.4%	3	8.6%	8	4.8%	2	4.6%	6	2.9%	4
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120
CHI How many children live in your household, aged 15 and under?														
None	69.6%	443	66.9%	78	67.5%	67	77.9%	74	78.0%	35	65.8%	92	69.0%	97
One	13.0%	83	13.3%	16	17.0%	17	4.1%	4	5.3%	2	15.6%	22	16.0%	22
Two	9.0%	57	7.2%	8	8.8%	9	9.3%	9	7.2%	3	10.2%	14	9.8%	14
Three	2.4%	15	4.7%	6	3.4%	3	0.0%	0	2.4%	1	3.8%	5	0.0%	0
Four	0.7%	5	3.1%	4	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0
Five or more	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	5.2%	33	4.7%	6	3.4%	3	8.6%	8	4.8%	2	4.6%	6	5.2%	7
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120
CAR How many cars does your household own or have the use of?														
None	10.9%	69	9.9%	12	15.4%	15	8.7%	8	8.5%	4	13.6%	19	8.1%	11
One	38.6%	246	40.8%	48	39.2%	39	41.3%	39	39.0%	17	34.9%	49	38.0%	53
Two	33.9%	216	28.3%	33	35.3%	35	26.6%	25	30.1%	13	35.8%	50	41.8%	59
Three or more	11.9%	76	16.2%	19	6.7%	7	14.8%	14	16.1%	7	11.1%	15	9.3%	13
(Refused)	4.8%	30	4.7%	6	3.4%	3	8.6%	8	6.3%	3	4.6%	6	2.9%	4
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120
ZON Zone:														
Zone 1 - Ebbw Vale South	18.4%	117	100.0%	117	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2 - Ebbw Vale North	15.7%	100	0.0%	0	100.0%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3 - Brynmawr	14.9%	95	0.0%	0	0.0%	0	100.0%	95	0.0%	0	0.0%	0	0.0%	0
Zone 4 - Blaina	7.0%	45	0.0%	0	0.0%	0	0.0%	0	100.0%	45	0.0%	0	0.0%	0
Zone 5 - Abertillery	21.9%	140	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	140	0.0%	0
Zone 6 - Tredegar	22.1%	141	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	141
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120
PC Postcode sector:														
NP13 1	13.0%	83	0.0%	0	0.0%	0	0.0%	0	0.0%	0	59.1%	83	0.0%	0
NP13 2	9.0%	57	0.0%	0	0.0%	0	0.0%	0	0.0%	0	40.9%	57	0.0%	0
NP13 3	7.0%	45	0.0%	0	0.0%	0	0.0%	0	100.0%	45	0.0%	0	0.0%	0
NP22 3	10.3%	66	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	46.7%	66
NP22 4	11.8%	75	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	53.3%	75
NP23 4	14.9%	95	0.0%	0	0.0%	0	100.0%	95	0.0%	0	0.0%	0	0.0%	0
NP23 5	15.7%	100	0.0%	0	100.0%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0
NP23 6	13.5%	86	73.6%	86	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
NP23 7	3.2%	21	17.6%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
NP23 8	1.6%	10	8.8%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		637		117		100		95		45		140		141
Sample:		637		111		100		101		80		125		120

WILLIAMS GALLAGHER

Reeves Retail Planning Consultancy

APPENDIX 3

EBBW VALE HEALTH CHECK

Blaenau Gwent Town Centre Audits and Health Checks

Centre Ebbw Vale	Current Status Principal Town Centre
Centre Description	Ebbw Vale is the largest town centre in Blaenau Gwent in terms of its retail (Class A1) floorspace and the number of units and it is focused along Bethcar Street / Market Street which run north /south parallel to the A4046. These streets provide mainly small retail units in older shop units, although more modern mixed use development has occurred to the north, where the centre's main multi-storey car park is located as part of the Ebbw Vale Shopping Centre development and to the south around The Walk. This area contains the larger, more modern retail units.
Catchment Area	Ebbw Vale is located in Zone 1 of the survey area but as the Principal shopping centre in the County Borough draws trade from across the study area.
Use of the Centre	Ebbw Vale is the most visited centre in Blaenau Gwent as would be expected given its role in the retail hierarchy, with 36% of all respondents visiting at least weekly and 56% visiting at least monthly. Within the home zones (Zones 1 and 2) 66% and 53% of respondents visit at least weekly and less than 10% of respondents in each zone indicate they never visit. Shopping is the main reason for visiting the centre, with 60% of all those visiting shopping there at least once a week and 86% shopping at least once a month. The financial services offer is also an important draw with just over a third of all visitors using these facilities at least once a month. The centre attracts 14.6% of all comparison spend in the study area, with the primary draws being its personal care/medical goods offer and household appliances. It has a limited draw for clothing and footwear. Aldi is a key anchor in terms of its convenience offer, but the out-of-centre Tesco and Morrisons stores area also very popular.

Town Centre Composition 2013 - 2020 (see attached tables)

Trends 2013 2020	In 2013 Ebbw Vale contained 116 units of which 61 were in A1 retail use (53%); 17 were in A3 use (15%) and 10 (9%) were vacant. By 2016 the total number of units had increased by 1 to 117. The number of A1 units had fallen by 4 to 57 (49% of the total) and vacancies had increased to 15 (13%). This was largely reversed by 2019 when A1 uses were up to 60 (51%) and vacancies down to 11 (9%). In the following 12 months, the reconfiguration of the former Store 21 unit at Market Street, resulted in 7 additional retail units being added to the stock, only 1 of which was let at the time of the survey. As a result of this and other closures, vacancies increased to 21 (17%), whilst A1 uses declined to 56 (45%).
Key Changes 2013 2016	Whilst overall numbers changed very little during this period, a degree of 'churn' was evident with 13 new vacancies seen but 12 previously vacant units let. The former included 3 vacant units within 10 Market Street which was sub-divided. The other three units were let. The closures included 6 comparison uses including Blockbusters and Barnardo's but openings included Savers and Bright House, with no resulting change to the number of national multiples represented in the centre.
Key Changes 2016 2019	This period saw the closure of 7 businesses, including a national bank (NatWest), Store 21 and Thomas Cook. The number of closures was more than offset by the 10 openings seen, including 2 new A1 convenience shops and 4 comparison outlets.
Changes 2019 2020	2020 has also seen the redevelopment of the former Store 21 unit at the Ebbw Vale Shopping Centre. The vacant unit has been converted into 8 smaller units one of which has been let to a comparison retailer. The other 7 remain vacant. This has contributed to an increase in the number of vacancies, with other closures including a convenience store and 4 comparison units including Shoe Zone. A number of other units have changed hands but remain trading.
Summary of changes in representation and vacancy levels	Up until 2019 the centre appears to have seen regular changes in occupancy but limited change in the overall offer or mix of uses. Comparison retail remains an important element of the offer occupying around half of the units. However, the number of national multiples represented in the centre is in decline. The centre has also seen the closure of a bank, which is typical of the national trend.

Long Term Vacancy	Just 1 unit, at 66 Bethcar Street has been vacant throughout the 2013 – 2020 period, although 2 units within the reconfigured development at 10 Market Street appear to have remained empty since their creation in 2016. A unit at 44 Bethcar Street has also been vacant since 2016. This suggests there is on-going interest in the centre, consistent with the investments seen during the period.

2019 Town Centre Composition (Goad Categories)

Use	No of Units	% of Units			Gross Floorspace (building footprint) (sqm) *	% Floorspace	
			UK Average (April 2019)				UK Average (April 2019)
Convenience (A1)	9	8.0%	9.2%		4,379	19.3%	15.4%
Comparison (A1)	41	36.3%	29.4%		10,296	45.4%	33.8%
Retail Service (A1)	13	11.5%	15.0%		1,292	5.7%	7.0%
Financial/Business (A2)	14	12.4%	9.9%		1,431	6.3%	7.4%
Food and Drink (A3)	17	15.0%	19.8%		2,007	8.8%	15.4%
Other Leisure Services	2	1.8%	4.6%		305	1.3%	10.1%
Miscellaneous/Other	6	5.3%	0.1%		1,932	8.5%	0.1%
Vacant (A Class)	11	9.7%	11.8%		1,049	4.6%	10.4%
Total	**113**	**100.0%**	**100.0%**		**22,691**	**100.0%**	**100.0%**

** Based on available / estimated floorspace data*

Multiple Retailers / Operators (9+ shops)	Convenience Multiples	Comparison Multiples
Total = 30	Aldi B&M Express Greggs Iceland Marshalls Newsagents	Argos Extra Boots Bright House Home Bargains Lloyds Pharmacy Peacocks Poundstretcher Savers Shoe Zone (now closed)

Food & Drink Offer	Ebbw Vale		UK Average	
	% A3 Units	% A3 Floorspace	% A3 Units	% A3 Floorspace
Café	29%	20%	9%	17%
Restaurant	0%	0%	24%	28%
Public House / Bar	18%	35%	43%	37%
Fast Food & Takeaway	53%	45%	24%	19%
Total	100%	100%	100%	100%

Diversity of Uses	Ebbw Vale has a strong comparison offer with a good range of national multiples and independent retailers. The centre also offers a good range of financial and business services. However, there is a limited leisure services offer within the centre and food & drink provision is considerably below the UK average in terms of floorspace. Nearly half of what is provided however comprises fast food & takeaway outlets, double the UK average. Restaurant provision is particularly limited.

2020 Turnover

2020 Turnover (£m) (2018 prices)	Convenience	Comparison	Total
Town Centre	£27.13m	£19.83m	£46.96m

Markets	The Ebbw Vale market operates on a Friday in the town centre.
Community Facilities	Community facilities are relatively limited within the town centre but include the library and the Ebbw Vale Learning Action Centre. Other community uses in relatively close proximity include the Civic Centre. There is also significant investment being made in the nearby site known as The Works which includes a Museum, Learning Centre, Sports Centre and hospital. This is linked to the town centre by the Cableway.
Visitor Provision	Attracting tourist trade to Ebbw Vale and Blaenau Gwent is a clear and on-going policy ambition. The Ebbw Vale Museum within The Works represents an important draw close to the town centre, but visitor provision within the centre is very limited.
Customer Views	Views on the centre are mixed with fairly even splits between those who think the centre has a good offer and those that consider it poor, and approximately half of respondents considering it to be neither. Despite the high use of the centre for shopping, slightly more respondents consider the offer to be poor rather than good. The ease of moving around the centre is highly rated and the availability of car parking is considered at least good by 38% of respondents compared with 27% who consider it poor.

Accessibility	The town centre is easily accessible off the A4046 for car borne visitors. The bus station also provides easy access. Since 2015 the town centre has also been served by trains to the Ebbw Vale Town Station approximately 300m (as the crow flies) from the town centre, with pedestrian access between the two benefitting from the cableway link. A one-way system operates through the centre.
Car Parking Provision	The town centre is served by a range of car parks, with surface charged parking available at The Walk and in small car parks at James Street / Market Street in the north and off Armoury Terrace in the south. There is also a multi-storey car park at the north of the town centre (part of Ebbw Vale Shopping Centre) and on-street parking along Bethcar and Market Streets. However, the multi-storey car park is dated and unwelcoming.
Pedestrian Provision	The centre makes good provision for pedestrians with wide pavements provided within the historic centre and linking to the newer stores at The Walk. Paving is generally in good condition and many parts provide level or sloping access across the road. Pedestrian provision within The Walk area however is less welcoming, with the McDonalds and Aldi stores separated from the rest of the retail offer by the main vehicular access along The Walk.
Conclusions on Accessibility	Ebbw Vale town centre benefits from good accessibility from the A4046 and within the historic centre there is a good balance between pedestrian and vehicular requirements as a result of previous investment in street surfaces. The multi-storey car park provides a good quantum of parking spaces but is dated and in need of investment. The more modern development around The Walk also benefits from good accessibility from the A4046 and provides the main area for surface car

	parking. It also has pedestrian links to the rest of the centre, but the layout favours the car.

Crime	Statistics from UKCrimeStats.com indicate 1,263 crimes in the year December 2019 – November 2020, for a daytime population of 9,192 in postcode sector NP23 6 which covers most of Ebbw Vale including Hilltop and extending southwards to Ebbw Vale Parkway. This equates to an overall rate of 13.7% compared to a UK crime rate of 10.6% over the same period. 0.4% of these crimes related to shoplifting, the same as the UK average and 3.9% to Anti-social behaviour (UK average 2.9%). Violent crimes accounted for 4.9% of crimes (UK average 3.1%). Crime data for the immediate town centre area is shown below. **NP23 6HQ Between December 2019 and November 2020** | ASB	Burglary	Other	Robbery	Vehicle	Violent	PD&W	Shoplifting	CD&A	Other Theft	Drugs	Bike Theft	Theft From the Person	Weapons	Public Order	Total Selected
---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---
101	8		1	10	130	0	25	5	10	3	1	1	1	78	374	 © Copyright UKCrimeStats.com 2011 Mobile Responsive conversion by TigaMedia *Crime in Ebbw Vale December 2019 – November 2020* *Source ukcrimestats.com*
Environmental Quality	The quality of the environment within the centre is mixed, with many of the historic areas benefitting from previous investment including attractive street furniture and buildings such as the Library. The clock and dragon sculpture provide particularly attractive focal points. The majority of buildings are in relatively good repair.

Development Opportunities	Development opportunities have previously been identified at Southern Gateway, Market Square (Site Allocations AA1.1, AA1.2 and R1.4) but have not been developed to date.

Evening and Night time Economy	There is limited provision within the town centre for evening and night-time activities. The Picture House is a large, prominently located Wetherspoons public house in the northern part of the centre, with Morgans Wine Bar and Level 14 providing food and drink and a nightclub in the south. The majority of other A3 uses however are takeaways.

Current View of Centre

Strengths	Strong comparison offer. High proportion of national multiples. Aldi store within town centre. Relatively low vacancy rate. Attractive streetscape. Recent investment.	Weaknesses/Gaps	Limited food and drink offer other than fast food/takeaways. Limited draw from outside Blaenau Gwent. Elongated nature of centre and separateness of Aldi.
Opportunities	Improved evening /night-time draws. Closure of Festival Park freeing up retail expenditure. Development of more varied A3 offer including restaurants.	Threats	Further loss of national multiples, especially within The Walk. Closure of Bank. Closure of Festival Park – reducing trade inflows to area.
Conclusions on Health of Centre	Ebbw Vale is a generally healthy town centre with a good convenience and comparison offer and below average vacancies. The streetscape along Bethcar and Market Streets is generally of a high quality and the buildings are relatively well maintained. The centre has a higher proportion of national multiples than the other centres in Blaenau Gwent but is unable to provide the same offer as either Cwmbran town centre or Cyfarthfa Retail Park in Merthyr Tydfil. Further losses within The Walk have the potential to reduce the draw through this area weakening the potential for linked shopping trips from Aldi, the key draw to the centre.		

Ebbw Vale Summary by Year

Year	A1	A2	A3	B1	B8	C3	D1	D2	SG	Vacant	Total Units
2012	49% (68)	10.8% (15)	14.4% (20)	0.7% (1)	0.7% (1)	5.0% (7)	2.9% (4)	0% (0)	7.9% (11)	8.6% (12)	139
2013	53% (61)	12.1% (14)	14.6% (17)	0.8% (1)	0.8% (1)	0	3.4% (4)	0% (0)	6.8% (8)	8.6% (10)	116
2014	49% (57)	12% (14)	16% (18)	1% (1)	1% (1)	0% (0)	3% (4)	0% (0)	7% (8)	11% (13)	116
2015	50% (58)	11% (13)	16% (18)	1% (1)	1% (1)	0% (0)	3% (3)	0% (0)	7% (8)	11% (13)	115
2016	49% (57)	13% (15)	13% (16)	1% (1)	1% (1)	0% (0)	3% (3)	0% (0)	7% (9)	13% (15)	117
2017	49.2% (58)	11.9% (14)	15.3% (18)	1.6% (2)	0% (0)	0% (0)	2.5% (3)	0% (0)	7.6% (9)	11.9% (14)	118
2018	51% (60)	13.5% (16)	14.4% (17)	0.8% (1)	0% (0)	0% (0)	3.4% (4)	0% (0)	5% (6)	11.9% (14)	118
2019	51.3% (60)	13.5% (16)	14.5% (17)	0.9% (1)	2% (2)	0% (0)	3.4% (4)	0% (0)	5% (6)	9.4% (11)	117
2020	45% (56)	12% (15)	12% (15)	2.4% (3)	1.6% (2)	0% (0)	3% (4)	0% (0)	7% (8)	17% (21)	124

Notes

7 more units created in 2020 at Shopping Mall (units M2 - M8) total of 8 units 1 already existing (was Store 21)

WILLIAMS GALLAGHER

Reeves Retail Planning Consultancy

APPENDIX 4

ABERTILLERY HEALTH CHECK

Blaenau Gwent Town Centre Audits and Health Checks

Centre Abertillery	Current Status District Town Centre
Centre Description	The defined town centre for Abertillery comprises two distinct areas, with the Primary Retail Area covering Church Street and including a range of historic and more modern retail units. The northernmost properties adjoining Division Street / Foundry Bridge include the recently refurbished former Trinity Church and the entrance to the Anvil Court office premises, which has been developed to the rear of the historic shop units. The town centre to the south comprises a small area of historic streets (Somerset Street, Market Street and High Street) including the Victorian Arcade and a number of historic buildings. The area also includes an Iceland foodstore in a more modern unit and The Met a community arts, culture and business centre. Immediately adjoining the town centre boundary is the main decked car park for the town centre. Further west and separated from the town centre by changes in levels are a number of community and service buildings, including the library, and then beyond Castle Street and at a lower level again, is the modern Tesco store and petrol station with its own surface parking.
Catchment Area	Abertillery is located in the south of the County Borough and primarily serves its local catchment (Zone 5). There is a small inflow of trade from Zone 4 and areas to the south (outside the study area).
Use of the Centre	Overall, 35% of all respondents indicated they visited Abertillery at least on an occasional basis, with 71% of respondents in the home zone (Zone 5) visiting at least once a month. Shopping is the main reason for visiting the centre, with 61% of all those visiting shopping there at least once a week and 85% shopping at least once a month. The service providers, bars / restaurants and cafes / coffee shops are also important attractors with just over a third of all visitors using these facilities at least once a month. The centre attracts 3.8% of all comparison spend in the study area, with the primary draw being its personal care/medical goods offer. It also has an important furniture/carpets, DIY/garden /pets and books/stationery offer. The centre has a limited draw in terms of its convenience offer, but the edge-of-centre Tesco attracts nearly a third of total convenience expenditure in the home zone.

Town Centre Composition 2013 - 2020 (see attached tables)

Trends 2013 2020	In 2013 Abertillery contained 132 units of which 51 were in A1 retail use (39%), 24 were in A3 use (18%) and 25 (19%) were vacant. By 2016 the total number of units in the centre had decreased by 2 to 130. Vacancies had also declined by 2 to 23 (18%) and sui generis uses by 3 to 6 (5%). There had been no change in the number of A1 or A2 units but A3 uses had increased by 1 and D1 uses by 2. By 2019 the number of units in the centre had declined further to 127, with the main change being in A2 uses – down from 15 to 11. A1 uses had increased by 1 and represented 41% of all units. Vacancies remained at 23 (18%). Sui Generis uses had increased to 9 and represented 7% of all units. By 2020, 1 new unit had been recorded in the centre but other changes were limited. Vacancies increased by 2 units (19%) including the loss of 1 A2 unit (8%).
Key Changes 2013 2016	Whilst overall numbers changed very little during this period, a degree of 'churn' was evident with 7 units becoming vacant and 9 vacant units being let. Two units were also removed from the market having been converted to residential use and a car park. New openings included just 1 convenience store, 1 comparison outlet and 1 comparison expansion, with most new businesses providing a service offer (retail, leisure or financial).
Key Changes 2016 2019	This period saw the closure of 10 businesses, including the Post Office at Anvil Court and a national bank (Barclays), as well as 2 other A2 uses. There was also a continued trend for A1 convenience and comparison uses to be replaced by service uses.
Changes 2019 2020	The 2019- 2020 period has seen the closure of 5 businesses and the opening of 5 new ones with an overall change in provision of 1 additional retail service use and the closure of an A2 use. However, one of the A1 comparison closures was of the national retailer Peacocks.
Summary of changes in representation and vacancy levels	The changes seen in the 2013 – 2019 period are typical of those seen across the UK, with a decline in the number of convenience and comparison retail uses and an increase in the importance of retail and leisure services. The closure of a standalone Post Office and the relocation of the service to an existing retail outlet, and a bank closure are also consistent with national trends. However overall, the centre appears to be relatively stable with the market adjusting to the changing needs of its customer base. In the 2019 – 2020 period there has been very little overall change, although the closure of Peacocks, a national multiple is of note, albeit such closures are being seen in many similar sized towns.

Long Term Vacancy	A total of 10 units have been vacant throughout the 2013 – 2020 period, which represents a relatively high proportion of long terms vacancies. This includes two clusters of units at the northern end of Church Street and the southern end of Somerset Street.

2019 Town Centre Composition (Goad Categories)

Use	No of Units	% of Units			Gross Floorspace (building footprint) (sqm) *	% Floorspace	
			UK Average (April 2019)				UK Average (April 2019)
Convenience (A1)	12	10.4%	9.2%		1,375	13.5%	15.4%
Comparison (A1)	21	18.3%	29.4%		2,986	29.3%	33.8%
Retail Service (A1)	24	20.9%	15.0%		1,386	13.6%	7.0%
Financial/Business (A2)	8	7.0%	9.9%		751	7.4%	7.4%
Food and Drink (A3)	24	20.9%	19.8%		2,126	20.9%	15.4%
Other Leisure Services	3	2.6%	4.6%		344	3.4%	10.1%
Miscellaneous/Other	0	0.0%	0.1%		0	0.0%	0.1%
Vacant (A Class)	23	20.0%	11.8%		1,213	11.9%	10.4%
Total	**115**	**100.0%**	**100.0%**		**10,181**	**100.0%**	**100.0%**

** Based on available floorspace data (not all available)*

Multiple Retailers (9+ shops)	Convenience Multiples	Comparison Multiples
Total 12	Greggs Iceland Premier Stores (franchise)	Boots Martins Newsagents The Original Factory Shop Tui (now closed)

Food & Drink Offer	Abertillery		UK Average	
	% A3 Units	% A3 Floorspace	% A3 Units	% A3 Floorspace
Café	25%	16%	9%	17%
Restaurant	0%	0%	24%	28%
Public House / Bar	29%	53%	43%	37%
Fast Food & Takeaway	46%	31%	24%	19%
Total	100%	100%	100%	100%

Diversity of Uses	The centre has a relatively balanced offer, similar to the UK average, but with unit sizes generally slightly above average. The Retail Service sector is particularly strong. The centre's retail provision is dominated by independent retailers, with only limited national multiple representation. Both the A2 Financial / Business and the A3 Food & Drink offer are also close to the UK average, with the latter also being more balanced than seen elsewhere in Blaenau Gwent. The Fast Food /Takeaway sector is however still over-represented, whilst restaurant provision is poor.

2020 Turnover

2020 Turnover (£m) (2018 prices)	Convenience	Comparison	Total
Town Centre	£3.29	£4.57	£7.86
Edge of Centre	£10.77	N/a	£10.77

Markets	The Abertillery market operates on a Thursday in Church Street.
Community Facilities	The Council Offices in Anvil Court and the Arts and Business hub provided at the Metropole provide important community facilities. The library is in an edge-of-centre location.
Visitor Provision	The Abertillery and District Museum at the Met, the Victorian Arcade and St Peter's church provide limited visitor interest in the centre and the Ebbw Fach trail passes close by. However, there is little provision aimed specifically at visitors within the centre.
Customer Views	Views on the town centre are mixed, with the ease of movement within the centre appreciated by the majority. The availability of car parking is also ranked positively. In contrast the range and quality of shops, is seen as poor and the attractiveness and overall experience of visiting the centre is only considered to be good by 16% of respondents.

Accessibility	The accessibility of the centre is reduced by the changes in levels within the area and its distance from the A467. The one way system which operates through the centre also presents challenges for those unfamiliar with it. Bus stops are provided on High Street close to St Peter's church allowing easy access to all parts of the town centre.
Car Parking Provision	The centre offers a good range of parking with on-street parking along Church Street complemented by surface car parks at Carmel Street to the south and off Foundry Bridge to the north. There is also a large, decked car park off High Street. Additional car parking is provided at the edge of centre Tesco store, although the pedestrian route between the store and the centre is not obvious.
Pedestrian Provision	Within the PRA pedestrian provision is good with traffic levels reduced by the one way system. The widened and levelled pavements are well generally maintained but the number of bollards installed to prevent car parking is noticeable. Within the rest of the town centre, pavements are generally narrower but well maintained with dropped kerbs provided throughout, aiding pedestrian movement. The use of different materials to aid pedestrians crossing roads is also helpful.
Conclusions on Accessibility	Within the centre accessibility is generally good with good quality provision for pedestrians. Car parking provision is also good both within and on the edge of the centre. The key issues arise as a result of the local topography.

Crime	Statistics from UKCrimeStats.com indicate 1,023 crimes in the year December 2019 – November 2020, for a daytime population of 7,774 in postcode sector NP13 1 which covers the northern part of Abertillery and Cwmtillery as well as the town centre. This equates to an overall rate of 13.2% compared to a UK crime rate of 10.6% over the same period. 0.4% of these crimes related to shoplifting, the same as the UK average and 4.9% to

Anti-social behaviour (UK average 2.9%). Violent crimes accounted for 3.7% of crimes (UK average 3.1%).

Crime data for the immediate town centre area is shown below.

NP13 1DA Between December 2019 and November 2020

ASB	Burglary	Other	Robbery	Vehicle	Violent	PD&W	Shoplifting	CD&A	Other Theft	Drugs	Bike Theft	Theft From the Person	Weapons	Public Order	Total Selected
141	16		1	17	126	0	29	11	35	4	1	1	2	55	438

© Copyright UKCrimeStats.com 2011

Crime in Abertillery December 2019 – November 2020
Source ukcrimestats.com

Environmental Quality	The quality of the environment within the centre varies considerably. The streetscape is generally of good quality with interesting street furniture and many properties are well maintained. There are also recent signs of investment. However, some areas particularly in the southern part of the town would benefit from cleaning and repairs to the street frontages.

Development Opportunities	Opportunities for development / redevelopment within the centre are limited, although there are opportunities to refurbish existing buildings and increase / introduce new uses to the centre. The proposed relocation of the Library to the recently refurbished Trinity Chapel is one such example which would also see the building used for adult education courses; an art gallery and a support hub offering employment and health advice. Refurbishment / reuse of the historic buildings in the southern part of the centre would offer further opportunities, potentially for a wider range of uses.

Evening and Night time Economy	Abertillery town centre contains a number of public houses and evening entertainment is provided at The Met. There is very limited provision within the centre for evening meals however, other than takeaways.

Current View of Centre

Strengths	Good range of town centre uses. The Metropole. Recent investment in key buildings. Attractive and high quality streetscape. Good range of parking. Edge of centre Tesco. Strong independent offer.	Weaknesses/Gaps	Topography making movement more difficult. Number of long term vacancies. Lack of bank. The Arcade does not provide a useful link within the town centre.
Opportunities	Relocation of library and other services to PRA. Development of more varied A3 offer including restaurants. Consolidation of centre.	Threats	Continued decline in key historic buildings.
Conclusions on Health of Centre	Abertillery is a generally healthy and attractive centre but appears to be oversized for its current role, as evidenced by the number of long term vacancies. It benefits from a good range of uses including employment in Anvil Court and a cultural/community offer at The Met. It is also likely to benefit from the draw of the edge-of-centre Tesco. The southern part of the town centre includes a number of buildings of character and The Victorian Arcade, but lacks a clear role or focus of offer and the environmental quality of the area is poorer, making it less attractive. There is a need to reduce the size of the centre and consolidate its offer.		

Abertillery Summary by Year

Year	A1	A2	A3	B1	B8	C3	D1	D2	SG	Vacant	Total Units
2012	31.6% (50)	10% (16)	17.1% (27)	0.7% (1)	0% (0)	12.7% (20)	1.9% (3)	0% (0)	5.7% (9)	20.3% (32)	158
2013	38.6% (51)	11.4% (15)	18.2% (24)	2.3% (3)	0% (0)	1.5% (2)	2.3% (3)	0% (0)	6.8% (9)	18.9% (25)	132
2014	38.5% (50)	10% (13)	17.7% (23)	1.5% (2)	0% (0)	1.5% (2)	1.5% (2)	0% (0)	6.2% (8)	23% (30)	130
2015	38% (50)	11% (14)	18% (23)	1.5% (2)	0% (0)	1.5% (2)	2% (3)	0% (0)	5% (7)	23% (30)	131
2016	39% (51)	12% (15)	19% (25)	2% (3)	0% (0)	1.5% (2)	4% (5)	0% (0)	4.5% (6)	18% (23)	130
2017	37% (48)	10% (13)	18% (24)	2% (3)	0% (0)	1% (2)	4% (5)	0% (0)	4% (5)	24% (31)	131
2018	38.3% (49)	10% (13)	20.3% (26)	1.6% (2)	0% (0)	1.6% (2)	3.9% (5)	0% (0)	6.3% (8)	18% (23)	128
2019	41% (52)	9% (11)	19.2%(24)	1.5% (2)	0% (0)	1.5% (2)	3% (4)	0% (0)	7% (9)	18%(23)	127
2020	41% (52)	8% (10)	19% (24)	1.5% (2)	0% (0)	1.5% (2)	3% (4)	0% (0)	7% (9)	19% (25)	128

WILLIAMS GALLAGHER

Reeves Retail Planning Consultancy

APPENDIX 5

BRYNMAWR HEALTH CHECK

Blaenau Gwent Town Centre Audits and Health Checks

Centre Brynmawr	Current Status District Town Centre
Centre Description	Brynmawr town centre comprises two distinct areas, the relatively flat and open area around Market Square and the historic linear shopping street of Beaufort Street. The PRA is identified as the southern half of the latter. This area is dominated by independents retailers and services, the only significant national multiples represented being Lloyds Bank and the Post Office both in the northern part of the centre. The town centre offer is complemented by the Lakeside Retail Park 300m to the south west of the town centre (as the crow flies) which provides large modern retail units for Asda and a number of comparison national multiples. Linkage between the two is not particularly inviting and the proposed redevelopment of the NMC/bus depot site has still to be completed. There has also been a recent retail/leisure development on the edge of the centre at King Street.
Catchment Area	Brynmawr is located to the north east of the County Borough and the town centre draws the majority of its trade from its home zone (Zone 3) and the Blaina area (Zone 4) to the south. This is a considerably more restricted catchment than the Lakeside Retail Park achieves, which draws trade from across the study area, especially Zones 2 and 5 in addition to Zones 3 and 4.
Use of the Centre	Overall, half of all respondents indicate they visit Brynmawr at least once a month, with this increasing to over 90% in the home zone (Zone 3) and to 77% in Zone 4. The most popular reason for visiting the town is to go shopping at the Lakeside Retail Park, with 63% of all visitors going there at least once a week and 93% at least once a month. At least weekly shopping trips to the town centre are undertaken by 33% of respondents, with 54% visiting monthly. Visits for other purposes are considerably lower, with less than 20% visiting at least monthly for any other purpose.

Town Centre Composition 2013 - 2020 (see attached tables)

Trends 2013 2020	In 2013 Brynmawr contained 105 units of which 48 were in A1 retail use (46%); 19 were in A3 use (18%) and 13 (12%) were vacant. By 2016 the total number of units in the centre had decreased by 3 to 102, with a decline of 4 A1 units and a reduction in vacancies of 3 (to 10%). The proportion of A2 uses had increased to 13% with 2 new units. By 2019 the number of units in the centre had increased by 1 to 103 and there had also been an increase in the A1 provision (+2 to 43%) and D2 uses (+1 to 3%). There had also been a marginal increase in vacancies (+1, to 11%). This period also saw the development of the site off King Street, with the main unit occupied by One Stop. This is outside of the defined town centre but represents significant investment in the town. The year to 2020 saw a fall in vacancies to 8 (8%) as a result of an A1 opening, a new B1 use and a decline in the total number of units recorded by 1.
Key Changes 2013 2016	This period saw an overall decline in vacancies, with 7 units being occupied and only 5 new vacancies. The openings included a range of uses, but just 1 additional A1 business. Closures were primarily of A1 businesses (4 in total), including one convenience store.
Key Changes 2016 2019	In this period there were 10 new openings in previously vacant units, including a new convenience store (as well as the opening of the edge of centre One Stop), an A1 comparison shop and 3 new A1 retail service outlets. There were also two A3 openings. Newly vacated units totalled 11 during the period and reflected 6 A1 comparison closures, three A1 service closures and the closure of a public house (The Grasshopper) and bank (Barclays).
Key Changes 2019 2020	The last year has seen relatively limited change in the town centre, with new openings (5) exceeding closures (2). The overall effect has been a slight diversification in the town centre offer with new service and non-retail openings. However, while the unit has been relet, it is of note that New Look have closed.
Summary of changes in representation and vacancy levels	Brynmawr town centre has been relatively stable during the period since 2013, although some changes, such as the closure of the Barclays Bank and more recently New Look, are consistent with national trends. Store closures have largely been offset by new openings and the overall mix is similar but with lower vacancies. The opening of the One Stop on the edge of the centre has also improved the retail offer.
Long Term Vacancy	There are no units that have been vacant for the whole of the study period, and all the vacant units in 2019 were occupied in 2016. This suggests there is no major issue with long term vacancies and those units that are vacant are of a quality that allows subsequent reletting.

2019 Town Centre Composition (Goad Categories)

Use	No of Units	% of Units			Gross Floorspace (building footprint) (sqm) *	% Floorspace	
			UK Average (April 2019)				UK Average (April 2019)
Convenience (A1)	9	8.7%	9.2%		700	6.9%	15.4%
Comparison (A1)	22	21.4%	29.4%		3,011	29.6%	33.8%
Retail Service (A1)	23	22.3%	15.0%		1,603	15.7%	7.0%
Financial/Business (A2)	11	10.7%	9.9%		1,076	10.6%	7.4%
Food and Drink (A3)	19	18.4%	19.8%		1,592	15.6%	15.4%
Other Leisure Services	3	2.9%	4.6%		1,045	10.3%	10.1%
Miscellaneous/Other	5	4.9%	0.1%		224*	2.2%	0.1%
Vacant (A Class)	11	10.7%	11.8%		937	9.2%	10.4%
Total	**103**	**100.0%**	**100.0%**		**10,188**	**100.1%**	**100.0%**

** Based on available floorspace data (not all available)*

Multiple Retailers (9+ shops)	Convenience Multiples	Comparison Multiples
Total = 9	Costcutter Greggs Lifestyle Express	New Look (closed by 2020) Post Office

Food & Drink Offer	Brynmawr		UK Average	
	% A3 Units	% A3 Floorspace	% A3 Units	% A3 Floorspace
Café	16%	15%	9%	17%
Restaurant	5%	9%	24%	28%
Public House / Bar	21%	41%	43%	37%
Fast Food & Takeaway	58%	35%	24%	19%
Total	100%	100%	100%	100%

Diversity of Uses	The centre has a relatively balanced offer, similar to the UK average, but with slightly less floorspace devoted to convenience sales than might be expected, reflecting the proximity of Asda at the nearby Retail Park. The slightly lower comparison offer and limited number of national multiples also reflects this. Retail service provision is however considerably above average and vacancies are slightly below the UK average. The A3 offer is slightly more diverse than in some other Blaenau Gwent centres but there is still an over-representation of fast food/takeaway uses and low levels of restaurant provision.

2020 Turnover

2020 Turnover (£m) (2018 prices)	Convenience	Comparison	Total
Town Centre	£0.65	£3.76	£4.41
Edge of Centre	£28.37	£9.15	£37.52

Markets	Brynmawr market is held every Saturday morning in the Market Square

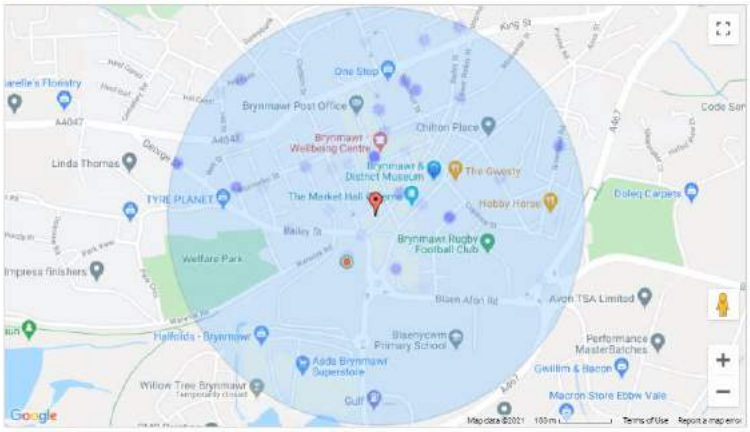
Community Facilities	Brynmawr has the only cinema in the County Borough which operates from the former Market Hall. The centre also has a library, museum, an education/training centre and a relatively new health and fitness club on Beaufort Street.
Visitor Provision	Visitor provision in the centre is limited, with the main draw being the Market Hall cinema. There are a number of food and drink options available within the centre but the range could be improved.
Customer Views	The overall offer of Brynmawr town centre and the retail park results in higher levels of satisfaction than is seen in some other centres, with nearly 40% ranking the range and quality of shops as at least 'good' compared with 21% who consider it poor. The availability of parking, ease of movement around the centre and overall attractiveness and experience of visiting are also ranked as good by more respondents than consider the offer poor. However, nearly half (45%) of all respondents consider the food and beverage offer to be poor.

,

Accessibility	The centre benefits from its proximity to the A465, A467 and A4047, as evidenced by the draw of the Lakeside Retail Park. The Market Square area also benefits from being level and easily accessed from the bus station. Beaufort Street and the PRA however have more limited access being part of a one way system.
Car Parking Provision	Car parking is provided in a number of small car parks located primarily on the edge of the centre. There is limited on-street parking on Beaufort Street and Market Square and a significant amount of surface car parking at the Lakeside Retail Park.
Pedestrian Provision	Pedestrian provision within the town centre is mixed, with the Market Square area benefitting from widened pavements and the Market Square itself. On Beaufort Street the pavements are relatively narrow but raised crossing tables are provided along its length and there is a pleasant pedestrian link from the northern car parking area, which also links to the new King Street development. The pedestrian route between the town centre and the Lakeside Retail Park is unattractive as it involves a walk along the busy Blaina Road. Crossing the access road to the Retail Park close to the roundabout is not prioritised and the remaining walk into the car park is relatively long and not particularly attractive.
Conclusions on Accessibility	Brynmawr town centre has good accessibility by car but provision for pedestrian movement within the centre is mixed. The area around Market Square is the most visible and accessible. Linkage to the Lakeside Retail Park is poor and is likely to limit linked shopping trips.

Crime	Statistics from UKCrimeStats.com indicate 1,365 crimes in the year December 2019 – November 2020 for a daytime population of 9,080 in postcode sector NP23 4 which covers Brynmawr, Natyglo and Garn Fach. This equates to an overall rate of 15.0% compared to a UK crime rate of 10.6% over the same period. 0.6% of these crimes related to shoplifting compared with the UK average of 0.4% and 5.7% to Anti-social behaviour (UK average 2.9%). Violent crimes accounted for 4.4% of crimes (UK average 3.1%). Crime data for the immediate town centre area is shown below.

NP23 4AW Between December 2019 and November 2020



ASB	Burglary	Other	Robbery	Vehicle	Violent	PD&W	Shoplifting	CD&A	Other Theft	Drugs	Bike Theft	Theft From the Person	Weapons	Public Order	Total Selected
139	5		3	16	85	0	21	9	20	3	0	0	1	37	349

© Copyright UKCrimeStats.com 2011

Crime in Brynmawr December 2019 – November 2020
Source ukcrimestats.com

Environmental Quality	Market Square provides a very attractive, high quality setting within the centre despite the traffic on the main road. Elsewhere within the centre the street surfaces are in good order and there is some interesting and good quality street furniture. However, other furniture such as the bollards is functional but unappealing. The buildings are generally of good quality with signs of recent investment in the prominently located New Griffin and The Talisman Public House.

Development Opportunities	The NMC/bus depot site represents the main development opportunity within/on the edge of the centre following the completion of the development off King Street. This site is allocated in the LDP and has planning permission for retail-led development. Work has started on site and once complete it will provide an active linkage between the Lakeside Retail Park and the town centre. There is also a Costa Coffee unit being developed opposite the Retail Park.

Evening and Night time Economy	Brynmawr town centre contains a number of public houses and evening entertainment is provided at the Market Hall Cinema. There is very limited provision within the centre for evening meals however, other than takeaways.

Current View of Centre

Strengths	Proximity of the Lakeside Retail Park to the town centre. Strong independent representation. Market Hall Cinema.	Weaknesses/Gaps	Limited food and drink offer. Poor linkage to Retail Park. Dispersed and small car parks.
Opportunities	Market Hall Cinema. Draw of the Retail Park. Good quality, flat space around Market Square. Improved linkage to retail Park and development of complementary offer. Development of the NMC/ Bus Depot site.	Threats	Loss of remaining bank. Further weakening of retail offer. Loss of key tenants at the Retail Park.
Conclusions on Health of Centre	Brynmawr is a generally healthy centre, despite the lack of national multiples and benefits from an attractive Market Place area, where the Market Hall cinema is also located. The Lakeside Retail Park is a major draw to Brynmawr and the challenge is attract some of these customers into the town centre. At the moment neither the retail or other town centre uses offer a sufficient draw, either individually or combined, meaning the turnover of the centre is low.		

Brynmawr Summary by Year

Year	A1	A2	A3	B1	B8	C3	D1	D2	SG	Vacant	Total Units
2012	31.2% (48)	9.1% (14)	14.3% (22)	0% (0)	0% (0)	22.1% (34)	1.3% (2)	1.3% (2)	7.1% (11)	13.6% (21)	154
2013	45.7% (48)	10.4% (11)	18% (19)	0% (0)	0% (0)	1.9% (2)	1.9% (2)	1.9% (2)	7.6% (8)	12.3% (13)	105
2014	44% (47)	11.2% (12)	18.7% (20)	0% (0)	0% (0)	1.9% (2)	2.8% (3)	1.9% (2)	8.4% (9)	11.1% (12)	107
2015	43% (45)	12% (13)	19% (20)	1% (1)	0% (0)	2% (2)	3% (3)	2% (2)	9% (10)	9% (10)	106
2016	42% (43)	13% (13)	18% (19)	1% (1)	0% (0)	2% (2)	2% (2)	2% (2)	10% (10)	10% (10)	102
2017	42.8% (44)	10.7% (11)	19.4% (20)	1% (1)	0% (0)	1.9% (2)	1.9% (2)	1.9% (2)	8.7% (9)	11.7% (12)	103
2018	42.8% (44)	11.6% (12)	19.4% (20)	0% (0)	0% (0)	1.9% (2)	1.9% (2)	3% (3)	10.7%(11)	8.7% (9)	103
2019	43% (45)	12% (12)	18% (19)	0% (0)	0% (0)	2% (2)	2% (2)	3% (3)	9% (9)	11% (11)	103
2020	45% (46)	12% (12)	18% (19)	1% (1)	0% (0)	2% (2)	2% (2)	3% (3)	9% (9)	8% (8)	102

APPENDIX 6

TREDEGAR HEALTH CHECK

Blaenau Gwent Town Centre Audits and Health Checks

Centre Tredegar	Current Status District Town Centre
Centre Description	Tredegar has a relatively large town centre with two distinct parts. The northern part is a linear centre running along Commercial Street and is formed of predominantly older shop units occupied by independent businesses. The northern part also includes the modern Gwent Shopping Centre, a precinct development that spans Stockton Way and links to the main surface car park for the centre. This provides larger modern retail units and forms the major part of the PRA. The southern part of the centre includes the stretch of Castle Street running south from its junction with Commercial Street to The Circle. This area forms part of the Tredegar Conservation Area and includes the Clock Tower and a number of larger historic buildings, a number of which have, or are benefitting from funding from the Tredegar Townscape Heritage Initiative. The area also includes the modern library complex. Again, the main occupiers are independent businesses, but the area also includes the main bank (Barclays) and several public houses.
Catchment Area	Tredegar is located in the north west of the County Borough, but has a more extensive draw than just its home zone (Zone 6), with 19% of all survey respondents visiting at least once a week and 25% visiting once a month. Inflow from Ebbw Vale (Zones 1 and 2) is good, with only Abertillery residents unlikely to visit the centre.
Use of the Centre	Overall, 37% of all respondents indicated they visited Tredegar at least occassionally, with 89% of respondents in the home zone (Zone 6) visiting at least once a month. Shopping is the main reason for visiting the centre, with 72% of all those visiting shopping there at least once a week. 92% of respondents shop there at least once a month. Other uses are less of a draw although 47% visit the bars / pubs at least once a month and 31% visit the financial / business services. The centre attracts 3.8% of all comparison spend in the study area, with the primary draw being its personal care/medical goods offer. It also is also an important centre for personal items and furniture/floor coverings purchases.

Town Centre Composition 2013 - 2020 (see attached tables)

Trends 2013 2020	In 2013 Tredegar town centre comprised 156 units of which 46% were in A1 retail use and 26 (17%) were vacant. By 2016 the number of units had fallen by 1 but vacancies had increased marginally to 28 units (18%). There had also been a shift from A2 Financial and business uses to Sui Generis occupiers. In 2019 the number of vacancies had increased to 21% (33 units) and there had been a corresponding decline in the A1 offer, which was reduced to 61 units (39%). There had been an increase of 2 in the A3 uses (16%). The period to 2020 saw a fall in vacancies to 29 (19%), reflecting an increase of 3 A3 uses and 2 A1 uses to 18% and 41% respectively.
Key Changes 2013 2016	Whilst overall numbers changed very little during this period, a relatively high degree of 'churn' was evident, with 15 units becoming vacant and 8 vacant units being let. Many of these closures were in the Gwent Shopping Centre and concerned national multiples (Tesco, Shaws, Cancer Research and HSBC). Elsewhere the units at the southern end of Commercial Street saw a number of closures. Openings included Poundland in the shopping centre and the reoccupation /refurbishment of The Cambrian.
Key Changes 2016 2019	This period saw the closure of 13 businesses and 8 new openings. These primarily related to independents in the A1 retail and retail service and personal care sector.
Changes 2019 2020	The period since 2020 has seen a noticeable decline in vacancies to 29 units (19%) despite the difficult trading conditions. A3 uses have increased to 27 (18%) and there has been a net increase in the number of retail outlets. Overall, 9 units were vacated, including 3 in the Gwent Shopping Centre previously occupied by the YMCA, but there were 13 openings, including the Tredegar Arms.
Summary of changes in representation and vacancy levels	There have been considerable number of changes in the centre between 2013 – 2020 period with the loss of a number of national multiples at the beginning of the period and an overall decline in the comparison offer. These trends are typical of what has been seen nationally. In the 2019 – 2020 period interest in the centre appears to have increased with new independent businesses opening or existing businesses expanding.
Long Term Vacancy	A total of 7 units have been vacant throughout the 2013 – 2020 period, including units within the Gwent Shopping Centre. The former Town Hall has also remained vacant throughout the period. Since 2016 there has been a cluster of long-term vacancies at the southern end of Commercial Street and increasing vacancies in the Shopping Centre.

2019 Town Centre Composition (Goad Categories)

Use	No of Units	% of Units			Gross Floorspace (building footprint) (sqm) *	% Floorspace	
			UK Average (April 2019)				UK Average (April 2019)
Convenience (A1)	10	6.5%	9.2%		2,918	14.0%	15.4%
Comparison (A1)	36	23.5%	29.4%		7,516	36.2%	33.8%
Retail Service (A1)	27	17.6%	15.0%		1,876	9.0%	7.0%
Financial/Business (A2)	13	8.5%	9.9%		1,340	6.4%	7.4%
Food and Drink (A3)	24	15.7%	19.8%		2,662	12.8%	15.4%
Other Leisure Services	3	2.0%	4.6%		956	4.6%	10.1%
Miscellaneous/Other	6	3.9%	0.1%		1,137	5.5%	0.1%
Vacant (A Class)	34	22.2%	11.8%		2,378	11.4%	10.4%
Total	**153**	**100.0%**	**100.0%**		**20,783**	**100.0%**	**100.0%**

** Based on available floorspace data (not all available)14.0%*

Multiple Retailers (9+ shops)	Key Convenience Multiples	Key Comparison Multiples	Key Independents
Total = 14	Farmfoods Greggs Lidl	Boots Home Bargains Poundland Savers	GFS Local Department Store

Food & Drink Offer	Tredegar		UK Average	
	% A3 Units	% A3 Floorspace	% A3 Units	% A3 Floorspace
Café	29%	24%	9%	17%
Restaurant	0%	0%	24%	28%
Public House / Bar	21%	43%	43%	37%
Fast Food & Takeaway	50%	33%	24%	19%
Total	100%	100%	100%	100%

Diversity of Uses	The centre has a relatively balanced offer similar to the UK average in terms of floorspace, but the proportion of vacant units is considerably higher. This suggests that it is the smaller units that are proving difficult to let. Leisure Service (including Food and Drink) provision is slightly below average but, the sector is dominated by the fast food/takeaway sector.

2020 Turnover

2020 Turnover (£m) (2018 prices)	Convenience	Comparison	Total
Town Centre	£9.62m	£6.01m	£15.63m

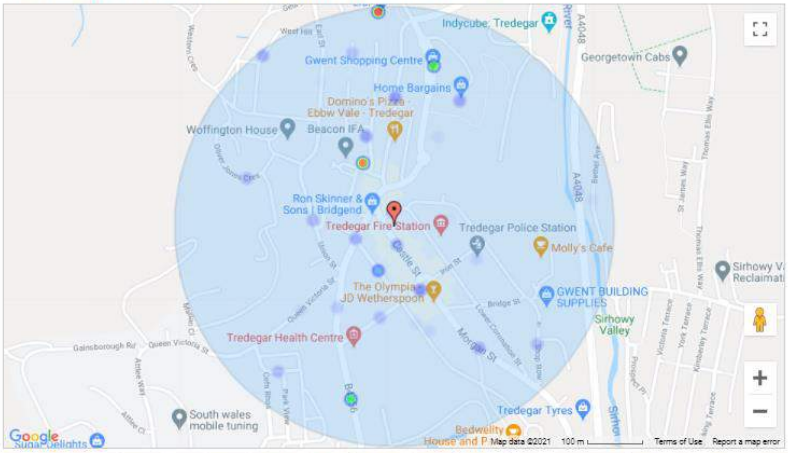
Markets	The Tredegar Indoor Market operates 6 days a week (Monday – Saturday). This is a collection of independent businesses primarily offering comparison goods and crafts.
Community Facilities	Tredegar library is located at The Circle and includes the local history museum. The Little Theatre is located in Coronation Street, but otherwise there is little community provision within the town centre.

Visitor Provision	Tredegar is seeking to develop its role as a tourist destination and the centre includes a number of artworks as well as the Clock Tower and historic buildings in the vicinity of The Circle. The centre also includes several public houses / hotels offering overnight accommodation.
Customer Views	Despite the high usage of the shops in Tredegar, overall levels of satisfaction with the offer are low, with 65% of respondents indicating they consider the range and quality of shops to be poor or very poor. Just 11% consider it to be at least good. The ease of moving around the centre is however highly rated as is the availability of car parking.

Accessibility	The two parts of the centre have different levels of accessibility, with the northern part along Commercial Street being mainly accessed on foot from the adjoining shopping centre car park and bus station. Traffic is restricted to one-way only and through traffic goes underneath the shopping centre. Traffic is two-way along Castle Street and around The Circle but is further from the bus station for those arriving by public transport.
Car Parking Provision	The main car parking is provided in the surface car park that adjoins the Gwent Shopping Centre, and pedestrians then access Commercial Street through the centre. There is limited on-street parking in Commercial Street and more along Castle Street. There is additional surface parking off Bank Lane.
Pedestrian Provision	Provision for pedestrians is good throughout the centre, with pavements widened in Commercial Street and traffic reduced to single lane. There is also traffic free access to this area via the Shopping Centre. To the south, pavements are narrower but adequate for the number of users and are generally well maintained. The most difficult area to navigate however is the link between them – dropped kerbs and islands are provided for pedestrians but traffic dominates, effectively splitting the centre into two.
Conclusions on Accessibility	The centre has good accessibility by road and within the northern part of the centre accessibility for pedestrians is also good. The southern part along Castle Street is a more traditional high street with two way traffic and pavements. However, the junction linking the two is not pedestrian friendly and is likely to reduce the interaction between the two.

Crime	Statistics from UKCrimeStats.com indicate 1,259 crimes in the year December 2019 – November 2020 for a daytime population of 8,113 in postcode sector NP22 3 which covers western Tredegar including the town centre. This equates to an overall rate of 15.5% compared to a UK crime rate of 10.6% over the same period. 0.8% of these crimes related to shoplifting, compared with the UK average of 0.4% and 5.1% to Anti-social behaviour (UK average 2.9%). Violent crimes accounted for 4.6% of crimes (UK average 3.1%). Crime data for the immediate town centre area is shown below.

NP22 3DG Between December 2019 and November 2020



ASB	Burglary	Other	Robbery	Vehicle	Violent	PD&W	Shoplifting	CD&A	Other Theft	Drugs	Bike Theft	Theft From the Person	Weapons	Public Order	Total Selected
127	11		0	12	118	0	61	12	23	5	1	2	0	61	433

© Copyright UKCrimeStats.com 2011

Mobile Responsive conversion by TigaMedia

Crime in Tredegar December 2019 – November 2020
Source ukcrimestats.com

Environmental Quality	The area around the Clock Tower has been the subject of recent and on-going public and private sector investment that is reflected in the high quality of many of the buildings and the street furniture. However, there remain areas where further improvements could be made to improve the overall appearance, such as the replacement of the 'functional' bollards. In the north the overall impression is of a more functional offer. The Gwent Shopping Centre is beginning to show signs of ageing and would benefit from investment.

Development Opportunities	Development opportunities within the centre are limited but there is evidence of existing properties being refurbished and brought back into use. This includes recent and on-going investment in properties around The Circle, including the NCB Town Hall.

Evening and Night time Economy	Evening and night-time activity is limited in the centre, overnight accommodation is available. There is also The Loft DJ Club on Queen Victoria Street.

Current View of Centre

Strengths	Mixture of units (size and age). Lidl providing regular draw. Evidence of recent investment around The Circle. Provision for visitors / tourists.	Weaknesses/Gaps	Poor performance of the Gwent Shopping Centre. Poor provision of food & drink and other leisure services, other than fast food/takeaway. Elongated nature of the centre resulting in a lack of focus.
Opportunities	Better integration of two parts of the centre. Strong interest from independents in the centre. Introduction of new uses to Shopping Centre Indoor market (opened 2019).	Threats	Closure of remaining Bank. Loss of national multiples. Continuing vacancies in the Gwent Shopping Centre. Decline in the central part of the centre, discouraging linkage between north & south.
Conclusions on Health of Centre	Tredegar is a relatively large centre and is generally healthy with average levels of vacancy in terms of floorspace. However, the location and long term nature of the vacancies, particularly within the Gwent Shopping Centre are a concern and are likely to be weakening the Primary Retail Area. In contrast there is recent and on-going investment in the southern part of the centre, around The Circle, which appears to be well placed to meet the identified shortfall in leisure services including in the restaurant sector. The challenge will be to integrate the two parts of the centre and potentially reduce the amount of retail floorspace provided whilst maintaining the linkages and flows within the centre.		

Tredegar Summary by Year

Year	A1	A2	A3	B1	B8	C3	D1	D2	SG	Vacant	Total
2012	41.8% (72)	9.3% (16)	12.8% (22)	0.6% (1)	0% (0)	7.0% (12)	2.9% (5)	0.6% (1)	5.2% (9)	19.8% (34)	172
2013	46.1% (72)	10.8% (17)	14.1% (22)	0.6% (1)	0% (0)	1.3% (2)	3.2% (5)	0.6% (1)	6.4% (10)	16.6% (26)	156
2014	44.9% (70)	9% (14)	14.7% (23)	0.6% (1)	0% (0)	1.3% (2)	3.2% (5)	0.6% (1)	7.1% (11)	18.6% (29)	156
2015	43.2% (67)	9% (14)	14.8% (23)	0.7% (1)	0% (0)	1.3% (2)	3.2% (5)	0.7% (1)	7.7% (12)	19.4% (30)	155
2016	44% (68)	8% (13)	14% (22)	1% (1)	0% (0)	1% (2)	3% (5)	1% (1)	10% (15)	18% (28)	155
2017	41% (63)	8% (13)	15% (23)	1% (1)	0% (0)	1% (1)	3% (5)	1% (1)	11% (18)	19% (30)	155
2018	37.4% (58)	9% (14)	14% (22)	1% (1)	0% (0)	1% (1)	2% (4)	1% (1)	10.6% (17)	24% (37)	155
2019	39% (61)	8% (13)	16% (24)	1% (1)	1% (1)	1% (1)	2% (4)	1% (1)	9% (15)	21% (33)	154
2020	41% (63)	7% (12)	18% (27)	1% (1)	0% (0)	1% (1)	2% (4)	1% (1)	10% (16)	19% (29)	154

WILLIAMS GALLAGHER

Reeves Retail Planning Consultancy

APPENDIX 7

BLAINA HEALTH CHECK

Blaenau Gwent Town Centre Audits and Health Checks

Centre Blaina	Current Status Local Town Centre
Centre Description	Blaina is a local centre focused around a traditional linear High Street and running from the Co-op foodstore in the north to the St Peter's Church area in the south. Its retail, service and leisure offer is inter-dispersed with residential development. The centre includes a number of historic buildings and more modern development. With the exception of the Co-op and the Post Office, all the businesses are independents.
Catchment Area	Blaina has a small catchment reflecting its role as a local centre, drawing most of its trade from its home zone (Zone 4). There is some trade inflow to the Co-op store from Zones 1, 3 and 5. The comparison draw is more limited with only minimal inflow, primarily from Zone 3.
Use of the Centre	Overall, just 17% of all respondents indicated they ever visited Blaina, with only 11% visiting at least once a month. Within the home zone (Zone 4) 60% of respondents visit at least once a week, but 26% visit less than once a month. Shopping is the main reason for visiting the centre, with 54% of those visiting shopping there at least once a week and 79% shopping at least once a month. The other main draw is the financial / business services which are visited by 19% at least once a month. In the home zone (Zone 4) the retail offer is the main draw, with 64% shopping in the centre at least once a week and 84% visiting at least monthly. There is again high usage of the financial /business services (25% weekly and 34% at least monthly). The bars / restaurants are the next most important draw, with 15% visiting at least monthly, followed by the service provision (10% at least monthly). Blaina also appears to be an important place of work for those living outside the immediate area, with 12% of all respondents visiting for this purpose at least once a week and 16% visiting at least monthly. However, within the home zone, just 6% visit for work purposes. The centre has a very limited comparison offer with the main purchases being personal care/medical items. There are also very small amounts of furniture/floor coverings, books/stationery and DIY/pet/garden items bring purchased from the centre.

Town Centre Composition 2013 - 2020 (see attached tables)

Trends 2013 2020	In 2013 Blaina contained 55 units of which 14 were in A1 retail use (26%), 8 were in A3 use (15%) and 16 (29%) were vacant. In 2016 the total number of units in the centre was the same but vacancies had fallen to 12 (22%), reflecting an increase in residential units. There had also been a loss of one A1 unit. By 2019 the number of A1 uses had fallen further to 11 (21%) and A3 uses to 7 (13%), with vacancies back up to 28% (15 units). The total number of units had also decreased by 2. By 2020 both A1 and A3 uses had increased by 1 to 22% and 15% respectively and vacancies had decreased to 13 (25%).
Key Changes 2013 2016	This period saw relatively limited change, with the 2 new vacancies more than offset by openings. The latter included the expansion of 2 existing businesses into adjoining units and 2 conversions to residential use. A public house was also brought back into use and a new A1 comparison business opened. The two closures were of a convenience and a comparison business.
Key Changes 2016 2019	Closures exceeded openings in this period, with 6 units becoming vacant and 4 vacant units being reoccupied, including one as a result of an existing business relocating. Other closures included 2 A1 comparison units and 2 A3 uses. Openings were service/leisure related with no new A1 shop openings.
Key Changes 2019 2020	This period has seen 4 previously vacant units being reoccupied and no new vacancies. Openings have included a new convenience store and a new fish bar occupying two adjoining units. The other opening has been a Funeral Directors in part of the former Market Hall.
Summary of changes in representation and vacancy levels	Blaina has seen relatively limited changes during the 2013 – 2020 period, with the mix of uses and vacancies remaining similar throughout. Key businesses have continued to trade with some local expansions, but overall vacancy levels have remained high.
Long Term Vacancy	A total of 5 units have been vacant throughout the 2013 – 2020 period (9%), which represents a high proportion of long terms vacancies. These are dispersed throughout the centre however and one of the key units, the former Market Hall has been partially let in 2019/20.

2019 Town Centre Composition (Goad Categories)

Use	No of Units	% of Units			Gross Floorspace (building footprint) (sqm) *	% Floorspace	
			UK Average (April 2019)				UK Average (April 2019)
Convenience (A1)	2	4.8%	9.2%		989	26.3%	15.4%
Comparison (A1)	6	14.3%	29.4%		533	14.2%	33.8%
Retail Service (A1)	6	14.3%	15.0%		222	5.9%	7.0%
Financial/Business (A2)	1	2.4%	9.9%		31	0.8%	7.4%
Food and Drink (A3)	7	16.7%	19.8%		599	15.9%	15.4%
Other Leisure Services	2	4.8%	4.6%		218	5.8%	10.1%
Miscellaneous/Other	2	4.8%	0.1%		35	0.9%	0.1%
Vacant (A Class)	16	38.1%	11.8%		1138	30.2%	10.4%
Total	**42**	**100.0%**	**100.0%**			**100.0%**	**100.0%**

** Based on available floorspace data (not all available)*

Multiple Retailers (9+ shops)	Convenience Multiples	Comparison Multiples
Total = 3	Co-operative	Post Office

Food & Drink Offer	Blaina		UK Average	
	% A3 Units	% A3 Floorspace	% A3 Units	% A3 Floorspace
Café	14%	10%	9%	17%
Restaurant	0%	0%	24%	28%
Public House / Bar	29%	58%	43%	37%
Fast Food & Takeaway	57%	33%	24%	19%
Total	100%	100%	100%	100%

Diversity of Uses	The centre has an above average convenience offer in terms of floorspace and high vacancy levels but a limited comparison offer consistent with its role as a local centre. Retail service provision is close to average but A2 provision is low and the food & drink offer has little variety being mainly provided by fast food/takeaways and public house/bars.

2020 Turnover

2020 Turnover (£m) (2018 prices)	Convenience	Comparison	Total
Town Centre	£1.23	£1.13	£2.36

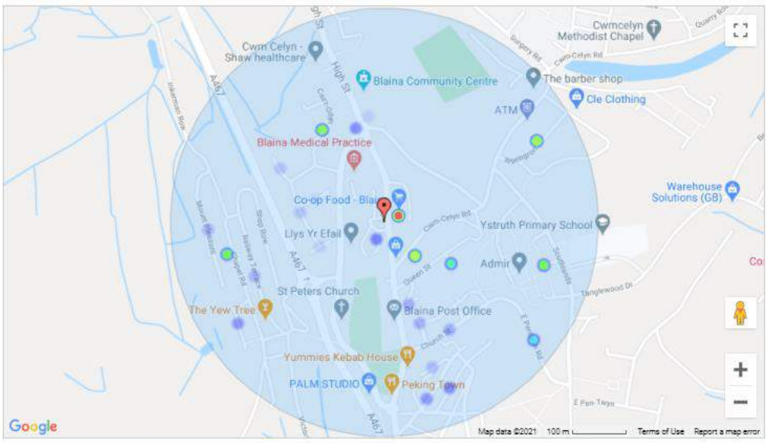
Markets	There is no market in Blaina.
Community Facilities	The centre includes a medical centre to the rear of the High Street, a Social club and a launderette but otherwise there is little community provision in-centre. The library and museum are located a short distance to the south outside of the centre boundary.

Visitor Provision	The Blaina Heritage Action Group Museum, which is based in Blaina Institute, is located just outside the southern boundary of the town centre but otherwise there is little visitor provision.
Customer Views	The low levels of usage of the centre are reflected in the high levels of dissatisfaction with its offer, with the overall experience and attractiveness of the centre considered to be poor or very poor by 71% of those using it. The range and quality of shops and places to eat and drink are considered to be poor by similar numbers. Only the ease of moving around the centre is considered positively by a majority of respondents.

Accessibility	The centre is spread out along both sides of a relatively narrow two-way road with a number of 'pinch points' when cars are parked on-street.
Car Parking Provision	Car parking is provided on-street and in a large surface car park between the High Street and Station Road. There are additional smaller car parks at the Co-op and at Cross Street.
Pedestrian Provision	A pedestrian link is provided to between the main car park and the High Street but otherwise pedestrian provision is limited to the traditional pavements, with dropped kerbs where required. There is a pedestrian crossing across the High Street near the Post Office.
Conclusions on Accessibility	The centre has reasonable accessibility for what would be expected to be a local catchment, many of whom would walk to the centre. However, the dispersed nature of the centre has the potential to create problems for the less mobile population.

Crime	Statistics from UKCrimeStats.com indicate 601 crimes in the year December 2019 – November 2020 for a daytime population of 3,962 in postcode sector NP13 3 which covers Blaina and Cwmcelyn. This equates to an overall rate of 15.2% compared to a UK crime rate of 10.6% over the same period. 0.3% of these crimes related to shoplifting, compared with the UK average of 0.4% and 5.9% to Anti-social behaviour (UK average 2.9%). Violent crimes accounted for 3.8% of crimes (UK average 3.1%). Crime data for the immediate town centre area is shown below.

NP13 3AF Between December 2019 and November 2020



ASB	Burglary	Other	Robbery	Vehicle	Violent	PD&W	Shoplifting	CD&A	Other Theft	Drugs	Bike Theft	Theft From the Person	Weapons	Public Order	Total Selected
75	15		0	3	54	0	9	6	10	4	0	0	0	28	204

© Copyright UKCrimeStats.com 2011

Mobile Responsive conversion by TigaMedia

Crime in Blaina December 2019 – November 2020

	Source ukcrimestats.com
Environmental Quality	The centre includes a few buildings of high quality and public interest but these contrast with a high proportion that show signs of neglect and many of which are vacant. There are also a few larger properties dating from the 1960s which appear out of scale and appearance with the rest of the centre. The streetscape is generally functional.

Development Opportunities	The centre does not include any obvious development sites, but the centre would benefit from the redevelopment / refurbishment of a number of the existing vacant and under-used properties.

Evening and Night time Economy	The centre includes a public house (The Bush Inn) and a social club, but otherwise the evening offer is limited, as would be expected in a smaller centre.

Current View of Centre

Strengths	Good anchor convenience store. Used by people working in area.	Weaknesses/Gaps	Dispersed nature of town centre offer. Limited choice of convenience outlets. Narrow roads and two way traffic. Restricted catchment area.
Opportunities	Some attractive older properties. Improved independent offer.	Threats	Increased vacancies. Closure of Post Office.
Conclusions on Health of Centre	Blaina is a weak centre in its current form as it contains a large number of vacant units, a considerable proportion of which have been vacant long-term. Several the properties are also in poor condition. The nature of the centre also means that those shops and businesses which are trading well and serving the local community are dispersed throughout the centre, reducing their impact and ability to support each other.		

Blaina Summary by Year

Year	A1	A2	A3	B1	B8	C3	D1	D2	SG	Vacant	Total Units
2012	23% (14)	3.3% (2)	18% (11)	0% (0)	0% (0)	19.7% (12)	1.6% (1)	1.6% (1)	6.6% (4)	26.2% (16)	100% (61)
2013	25.5% (14)	5.5% (3)	14.5% (8)	0% (0)	0% (0)	16.3% (9)	1.8% (1)	1.8% (1)	5.5% (3)	29.1% (16)	55
2014	25.5% (14)	1.8% (1)	14.5% (8)	3.6% (2)	0% (0)	18.2% (10)	1.8% (1)	1.8% (1)	5.5% (3)	27.3% (15)	55
2015	22.6% (12)	1.9% (1)	18.9% (10)	5.65% (3)	0% (0)	18.9% (10)	1.9% (1)	1.9% (1)	5.65% (3)	22.6% (12)	53
2016	23.6% (13)	1.8% (1)	16.4% (9)	5.5% (3)	0% (0)	21.8% (12)	1.8% (1)	1.8% (1)	5.5% (3)	21.8% (12)	55
2017	24.5% (13)	1.9%(1)	1.9% (8)	3.8% (2)	0% (0)	22.6% (12)	1.9% (1)	1.9% (1)	7.5% (4)	20.8% (11)	53
2018	21% (11)	4% (2)	13.2% (7)	1.9% (1)	0% (0)	22.6% (12)	1.9% (1)	1.9% (1)	7.5% (4)	26% (14)	53
2019	21% (11)	4% (2)	13.2% (7)	1.9% (1)	0% (0)	22.6% (12)	1.9% (1)	0% (0)	7.5% (4)	28% (15)	53
2020	22.1% (12)	4% (2)	15% (8)	1.9% (1)	0% (0)	22.6% (12)	1.9% (1)	0% (0)	7.5% (4)	25% (13)	53

APPENDIX 8

QUANTITATIVE CAPACITY ASSESSMENT

Quantitative Capacity Assessment

1. Introduction

1.1. This Appendix sets out the methodology and full results for the retail capacity assessment that has been prepared for Blaenau Gwent.

1.2. The approach adopted follows standard good practice and utilises the results from the 2020 Household Survey. All the tables referred to are included at the end of this appendix with some reproduced within the text where helpful.

2. Population

2.1. Base line 2018 population levels for the 6 zones have been obtained from Experian. Projected population levels for the end of the plan period (2033) and the intervening years of 2020, 2025 and 2030 have been obtained from the same source and are as follows:

Table A8.1: Population by Zone

Population	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6		Total
2011 Census	12,592	10,748	10,165	4,808	15,019	15,103		68,435
2018 Base	13,176	10,537	10,431	5,171	15,056	15,384		69,755
2020	13,172	10,576	10,401	5,159	15,018	15,362		69,688
2025	13,136	10,477	10,353	5,117	14,903	15,254		69,240
2030	13,050	10,354	10,283	5,054	14,708	15,080		68,529
2033	12,948	10,277	10,207	5,005	14,566	14,943		67,946

Notes

2011 Population from Census

2018 Population estimates and 2020 - 2033 projections from Experian

2.2. This indicates a small decline in population levels during the period 2018 to 2033, apparently offsetting the small increase in population seen between 2011 and 2018.

2.3. However, these projections, which are derived from ONS data, are based on past trends rather than the population growth and distribution that may be anticipated in the Replacement Local Development Plan. They may not correspond exactly therefore with the quantum, its physical distribution or timing proposed in this future document, but any differences are unlikely to have a significant effect on these projections.

3. Available Expenditure

3.1. Available expenditure per head has also been obtained from Experian for both convenience and comparison goods by zone, with the latter provided for the key categories of goods asked about in the household survey.

3.2. Convenience goods expenditure per head is set out in Table A8.2, with the 2018 Experian base figure adjusted to remove spend made through 'Special Forms of Trading' (SFT) in line with the national average, as estimated by Experian (Experian Retail Planner Briefing Note 18) (ERPBN18).

Table A8.2: Convenience Expenditure per Head 2018 - 2033 (2018 prices)

Convenience Expenditure per Head (£) (2018 prices)	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
2018 Total	£1,998	£2,078	£2,044	£1,957	£2,003	£2,097
2018 exc SFT	£1,922	£1,999	£1,966	£1,883	£1,927	£2,017
2020 exc SFT	£2,013	£2,093	£2,059	£1,972	£2,018	£2,113
2025 exc SFT	£1,899	£1,975	£1,942	£1,860	£1,903	£1,993
2030 exc SFT	£1,883	£1,959	£1,927	£1,845	£1,888	£1,977
2033 exc SFT	£1,881	£1,957	£1,925	£1,843	£1,886	£1,975

Notes

2018 Convenience Expenditure from Experian

2018 Convenience expenditure exc SFT allows for SFT at 3.8% (Experian Retail Planner Briefing Note 18, Figure 5)

2020 - 2033 Projected expenditure based on expected change in spend (Experian Retail Planner Briefing Note 18, Figure 6)

3.3. Experian estimate that in 2018, 12.8% of available convenience expenditure was spent in locations other than retail shops, although this decreases to 3.8% once allowance is made for those orders made online but fulfilled through stores.

3.4. This compares with the results from the household survey which suggest that just 2.5% of all respondents were ordering their main food shopping online prior to the Covid-19 pandemic with a further 2.1% shopping online on an occasional basis.

3.5. However, this proportion increased to 16% during /after the initial lockdown and a significant minority of respondents suggest that they will change their shopping habits as a result of recent experiences. With 25.5% of these respondents indicating they are likely to use the internet for most of their food and grocery shopping in the future and 33.1% indicating they will use it more than previously, any difference between national and local usage levels appears likely to decrease.

3.6. It is therefore considered that use of the current Experian estimates for SFT provide a reasonable estimate of what is likely to happen in Blaenau Gwent during the plan period, although Experian rates themselves may be revised in the future, when the long term impacts of pandemic become clearer. This is one of the reasons why the longer term forecasts provided here should be treated with a degree of caution and will need reviewing at regular intervals.

3.7. The available spend per head forecasts for future years is also based on Experian projections (ERPBN18, Figure 6) and is also shown in Table A8.2. The resulting available convenience expenditure by zone is set out in Table A8.3.

Table A8.3: Total Available Convenience Expenditure 2018 - 2033 excluding SFT (2018 prices)

Convenience Expenditure per Head (£m) (2018 prices)	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total	Change in Expenditure from 2018
2018 Total	£26.33	£21.90	£21.32	£10.12	£30.16	£32.26	£142.08	
2018 exc SFT	£25.33	£21.06	£20.51	£9.74	£29.01	£31.03	£136.68	
2020 exc SFT	£26.51	£22.14	£21.42	£10.17	£30.30	£32.45	£143.00	£6.32
2025 exc SFT	£24.94	£20.69	£20.11	£9.52	£28.36	£30.39	£134.01	-£2.67
2030 exc SFT	£24.58	£20.28	£19.81	£9.32	£27.77	£29.81	£131.57	-£5.11
2033 exc SFT	£24.36	£20.11	£19.65	£9.22	£27.47	£29.51	£130.32	-£6.36

Notes

From Table A8.1 and A8.2

3.8. This shows that overall there is expected to be a decrease in available convenience spend (excluding SFT) during the plan period of £6.36m. This equates to a decline of 4.7% and reflects the general trend across the UK which is seeing minimal change in convenience expenditure in real terms, but an increasing proportion of it being diverted to SFT. In Blaenau Gwent, this trend is exacerbated by the expected decline in population (Table A8.1).

3.9. The equivalent comparison goods expenditure analysis is set out in Tables A8.4 and A8.5.

Table A8.4: Comparison Expenditure per Head 2018 - 2033 (2018 prices)

Comparison Expenditure per Head (£) (2018 prices)	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
2018 Total	£2,493	£2,720	£2,666	£2,436	£2,427	£2,667
2018 exc SFT	£2,074	£2,263	£2,218	£2,027	£2,019	£2,219
2020 exc SFT	£1,834	£2,001	£1,961	£1,792	£1,785	£1,962
2025 exc SFT	£2,177	£2,376	£2,328	£2,128	£2,120	£2,329
2030 exc SFT	£2,435	£2,656	£2,604	£2,379	£2,370	£2,605
2033 exc SFT	£2,622	£2,861	£2,804	£2,562	£2,552	£2,805

Notes

2018 Comparison Expenditure from Experian

2018 Comparison expenditure exc SFT allows for SFT at 16.8% (Experian Retail Planner Briefing Note 18, Figure 5)

2020 - 2033 Projected expenditure based on expected change in spend (Experian Briefing Note 18, Figure 6)

Table A8.5: Total Available Comparison Expenditure 2018 - 2033 excluding SFT (2018 prices)

Comparison Expenditure per Head (£m) (2018 prices)	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total	Change in Expenditure from 2018
2018 Total	£32.85	£28.66	£27.81	£12.60	£36.54	£41.03	£179.48	
2018 exc SFT	£27.33	£23.85	£23.14	£10.48	£30.40	£34.14	£149.33	
2020 exc SFT	£24.15	£21.16	£20.40	£9.24	£26.81	£30.14	£131.90	-£17.43
2025 exc SFT	£28.60	£24.89	£24.11	£10.89	£31.59	£35.53	£155.60	£6.27
2030 exc SFT	£31.77	£27.50	£26.77	£12.02	£34.86	£39.28	£172.21	£22.88
2033 exc SFT	£33.95	£29.40	£28.62	£12.82	£37.18	£41.91	£183.88	£34.55

Notes

From Table A8.1 and A8.4

3.10. This indicates that expenditure on comparison goods will increase in real terms by £34.55m during the plan period to 2033, but that the pandemic will give rise to a significant decline in spend in 2020 compared with 2018 Experian base figures and this is unlikely to be recovered until 2024 / 2025.

3.11. However, figures for more than 5 years ahead must be treated with considerable caution given the forecast level of increase relies heavily on the assumptions made regarding the percentage uplift in expenditure per head per annum. Even a small change in such an assumption can have a considerable effect on the forecast over an extended period, given the compound effects.

3.12. It is also the case that at the current time, even the forecasts for the next 5 years may be subject to more change than would normally be expected, due to the impact of the pandemic.

4. Convenience Market Share

4.1. The next stage in the analysis is to estimate the current market shares for convenience outlets using the results from the household survey (Q01, Q02 & Q04).

4.2. The main destinations for food and grocery shopping in the Blaenau Gwent study area (Q01) are set out in Table A8.6A, with the market shares adjusted to exclude SFT and null responses in Table A8.6B.

4.3. The responses to the 'other destinations' used for convenience shopping (Q04) are set out in Tables A8.7A – 7C, with Table A8.7A based on the original household results and Tables A8.7B and A8.7C adjusted to exclude null responses and rebased to reflect multiple responses (Table A8.7B)[1]. The rebased data with SFT excluded, is then set out in Table A8.7C.

4.4. The overall market shares for the convenience destinations are set out in Table A8.8, with the 'main' and 'other' destinations weighted at 75% and 25% of total convenience spend respectively.

[1] Question 4 was not limited to a single response and therefore the totals can add up to more than 100%

Table A8.8: Convenience Market Shares

Zone	Main Shop	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Tesco, North West Approach, Ebbw Vale	18.4%	38.8%	27.8%	8.1%	4.4%	3.5%	20.4%
1	Aldi, The Walk, Ebbw Vale	15.4%	22.6%	24.8%	15.9%	9.9%	10.1%	9.2%
1	Iceland, Unit 1, Ebbw Vale Retail Park, Ebbw Vale	2.6%	7.3%	4.6%	2.0%	1.5%	0.0%	0.9%
1	Ebbw Vale Town Centre - Other	1.0%	2.7%	2.1%	0.3%	0.3%	0.2%	0.2%
1	Cwm	0.1%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	15.2%	13.0%	24.4%	11.4%	2.3%	5.5%	26.9%
2	B&M, Rhyd-Y-Blew, Ebbw Vale	0.7%	1.4%	1.0%	0.6%	0.3%	0.2%	0.6%
2	Rassau	0.2%	0.0%	0.2%	0.9%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Nanytyglo, Brynmawr	17.3%	5.6%	9.9%	46.8%	47.7%	15.9%	4.8%
3	Lakeside Retail Park, Nanytyglo, Brynmawr - Other	1.5%	0.9%	1.1%	4.1%	2.7%	1.5%	0.1%
3	Brynmawr Town Centre	0.5%	0.1%	0.1%	2.0%	1.3%	0.2%	0.0%
3	Nantyglo	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%
4	Co-op, 53 High Street, Blaina	0.8%	0.3%	0.0%	0.4%	7.6%	0.6%	0.0%
4	Blaina Town Centre - Other	0.1%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%
5	Tesco, Castle Street, Abertillery	7.4%	0.0%	0.0%	0.9%	5.8%	31.3%	0.0%
5	Iceland, 31 High Street, Abertillery	1.9%	0.0%	0.0%	0.1%	2.2%	7.9%	0.3%
5	Abertilllery Town Centre - Other	0.4%	0.0%	0.0%	0.2%	0.4%	1.5%	0.0%
5	Llanhilleth	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%
5	Aberbeeg	0.1%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
6	Lidl, Gelli Road, Tredegar	4.8%	0.6%	0.2%	0.0%	0.2%	0.0%	20.9%
6	Tredegar Town Centre - Other	1.6%	0.0%	0.0%	0.0%	0.0%	0.1%	6.9%
Outside	Asda, Dowlais Top, Merthyr Tydfil	2.5%	1.5%	2.6%	1.4%	0.3%	0.5%	6.6%
Outside	Merthyr Tydfil - Other	1.3%	2.5%	0.6%	0.5%	2.0%	0.7%	1.8%
Outside	Blackwood - Any Store	2.6%	0.7%	0.0%	0.0%	0.7%	11.1%	0.0%
Outside	Risca - Any Store	1.7%	0.1%	0.5%	2.5%	2.9%	4.5%	0.0%
Outside	Abergavenny - Any Store	1.1%	0.7%	0.0%	1.3%	4.1%	2.3%	0.0%
Outside	Cwmbran - Any Store	0.3%	0.5%	0.0%	0.2%	1.0%	0.6%	0.0%
Outside	Other	0.6%	0.4%	0.2%	0.3%	1.4%	1.3%	0.4%
	Internet / delivery							
	(Don't know / varies)							
	(Don't do this)							
	(Nowhere else)							
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Based on 75% spend at Main Food & Grocery destination and 25% at 'Other' outlets

4.5. This is based on the responses provided to Q02 which indicate the proportion of spend made by respondents at their main food and grocery location. The results from this question are summarised in Table A8.9A, with the cumulative percentages set out in Table A8.9B. Null responses are excluded in Table A8.9C, where the median response for each of the zones is highlighted. This falls between 61% and 80% for all zones.

Table A8.9C: Use of Main Shop (Q02)- Cumulative excluding null responses

% Spend at Main Food & Grocery Shop (Q02)	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
None	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1 - 10%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%
11 - 20%	1.6%	1.0%	0.0%	0.0%	4.8%	0.0%	4.9%
21 - 30%	2.8%	3.5%	1.1%	1.2%	6.2%	0.4%	5.8%
31 - 40%	5.1%	5.2%	6.0%	3.5%	9.4%	3.3%	5.8%
41 - 50%	20.0%	25.4%	16.2%	12.4%	18.8%	18.8%	25.4%
51 - 60%	29.8%	28.6%	30.9%	23.9%	21.9%	27.4%	39.2%
61 - 70%	40.3%	37.8%	44.1%	32.9%	25.8%	39.6%	50.3%
71 - 80%	64.9%	57.0%	69.6%	59.0%	59.5%	66.4%	72.3%
81 - 90%	80.8%	75.1%	83.6%	80.1%	80.3%	76.2%	89.0%
91 - 99%	86.5%	82.7%	89.0%	87.2%	87.0%	82.4%	91.5%
100%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

5. Convenience Turnover by Location

5.1. The resulting turnover for the individual locations based on the 2020 household survey market shares, is then provided in Table A8.10A – A8. 10E for the years 2018 (as the 'data' base year), 2020, 2025, 2030 and 2033.

5.2. This represents the turnover to these stores and locations coming from within the study area.

5.3. To estimate inflows from the wider area, the most recent Merthyr Tydfil and Newport Councils Retail Studies have been reviewed. These suggest that the larger out of centre foodstores such as Morrisons and Tesco in Ebbw Vale and Asda at Brynmawr are attracting a small amount of trade from areas outside the current study area.

5.4. There is also likely to be a degree of inflow to the Abertillery, Llanhillith and Abergeeg stores given their proximity to the edge of the study area. However, inflows otherwise appear to be limited, reflecting the similar or greater convenience provision in the surrounding areas.

5.5. A small amount of inflow has therefore been allowed for ranging from 2% to 5% of the study area turnover for selected stores and the resulting convenience turnover including inflow is included within Tables A8.10A-E.

Table A8.10A: Convenience Turnover 2018

Zone	Convenience Turnover	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar	Total from Study Area	Estimated % Inflow from outside Study Area	Total Convenience Turnover (£m)
	Available Convenience Spend 2018 (£m)	£25.33	£21.06	£20.51	£9.74	£29.01	£31.03	£136.68		
1	Tesco, North West Approach, Ebbw Vale	£9.83	£5.86	£1.65	£0.43	£1.01	£6.33	£25.11	5.0%	£26.43
1	Aldi, The Walk, Ebbw Vale	£5.73	£5.21	£3.26	£0.96	£2.93	£2.86	£20.96	2.0%	£21.39
1	Iceland, Unit 1, Ebbw Vale Retail Park, Ebbw Vale	£1.84	£0.96	£0.40	£0.14	£0.00	£0.27	£3.62	2.0%	£3.69
1	Ebbw Vale Town Centre - Other	£0.68	£0.44	£0.06	£0.03	£0.07	£0.06	£1.34	2.0%	£1.37
1	Cwm	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	0.0%	£0.10
2	Morrisons, Beaufort Road, Ebbw Vale	£3.30	£5.15	£2.33	£0.22	£1.58	£8.36	£20.94	5.0%	£22.05
2	B&M, Rhyd-Y-Blew, Ebbw Vale	£0.35	£0.21	£0.13	£0.03	£0.05	£0.20	£0.97	5.0%	£1.02
2	Rassau	£0.00	£0.04	£0.19	£0.00	£0.00	£0.00	£0.23	0.0%	£0.23
3	Asda, Lakeside Retail Park, Nanytyglo, Brynmawr	£1.41	£2.08	£9.59	£4.64	£4.60	£1.49	£23.83	5.0%	£25.08
3	Lakeside Retail Park, Nanytyglo, Brynmawr - Other	£0.22	£0.22	£0.85	£0.26	£0.44	£0.03	£2.02	5.0%	£2.13
3	Brynmawr Town Centre	£0.03	£0.02	£0.41	£0.13	£0.05	£0.00	£0.63	0.0%	£0.63
3	Nantyglo	£0.00	£0.00	£0.02	£0.00	£0.00	£0.00	£0.02	0.0%	£0.02
4	Co-op, 53 High Street, Blaina	£0.08	£0.00	£0.09	£0.74	£0.17	£0.00	£1.08	0.0%	£1.08
4	Blaina Town Centre - Other	£0.00	£0.00	£0.00	£0.10	£0.00	£0.00	£0.10	0.0%	£0.10
5	Tesco, Castle Street, Abertillery	£0.00	£0.00	£0.19	£0.56	£9.07	£0.00	£9.82	5.0%	£10.34
5	Iceland, 31 High Street, Abertillery	£0.00	£0.00	£0.02	£0.22	£2.30	£0.09	£2.63	0.0%	£2.63
5	Abertilllery Town Centre - Other	£0.00	£0.00	£0.04	£0.04	£0.44	£0.00	£0.53	0.0%	£0.53
5	Llanhilleth	£0.00	£0.00	£0.00	£0.00	£0.05	£0.00	£0.05	5.0%	£0.05
5	Aberbeeg	£0.00	£0.00	£0.00	£0.00	£0.12	£0.00	£0.12	5.0%	£0.12
6	Lidl, Gelli Road, Tredegar	£0.15	£0.04	£0.00	£0.02	£0.00	£6.49	£6.69	5.0%	£7.04
6	Tredegar Town Centre - Other	£0.00	£0.00	£0.00	£0.00	£0.03	£2.15	£2.17	0.0%	£2.17
	Total within Study Area	£23.71	£20.24	£19.24	£8.52	£22.91	£28.32	£122.94		£128.18
Outside	Asda, Dowlais Top, Merthyr Tydfil	£0.37	£0.54	£0.28	£0.03	£0.14	£2.06	£3.42		
Outside	Merthyr Tydfil - Other	£0.63	£0.13	£0.11	£0.19	£0.20	£0.54	£1.81		
Outside	Blackwood - Any Store	£0.18	£0.00	£0.00	£0.07	£3.22	£0.00	£3.47		
Outside	Risca - Any Store	£0.03	£0.11	£0.52	£0.28	£1.30	£0.00	£2.24		
Outside	Abergavenny - Any Store	£0.19	£0.00	£0.26	£0.40	£0.67	£0.00	£1.53		
Outside	Cwmbran - Any Store	£0.13	£0.00	£0.04	£0.10	£0.17	£0.00	£0.44		
Outside	Other	£0.09	£0.04	£0.06	£0.13	£0.39	£0.12	£0.84		
	Total	£25.33	£21.06	£20.51	£9.74	£29.01	£31.04	£136.69		

Table A8.10B: Convenience Turnover 2020

Zone	Convenience Turnover	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar	Total from Study Area	Estimated % Inflow from outside Study Area	Total Convenience Turnover (£m)
	Available Convenience Spend 2020 (£m)	£26.51	£22.14	£21.42	£10.17	£30.30	£32.45	£143.00		
1	Tesco, North West Approach, Ebbw Vale	£10.29	£6.16	£1.73	£0.45	£1.06	£6.62	£26.29	5.0%	£27.68
1	Aldi, The Walk, Ebbw Vale	£6.00	£5.48	£3.40	£1.01	£3.06	£3.00	£21.94	2.0%	£22.39
1	Iceland, Unit 1, Ebbw Vale Retail Park, Ebbw Vale	£1.93	£1.01	£0.42	£0.15	£0.00	£0.28	£3.79	2.0%	£3.87
1	Ebbw Vale Town Centre - Other	£0.71	£0.46	£0.07	£0.03	£0.08	£0.06	£1.40	2.0%	£1.43
1	Cwm	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	0.0%	£0.10
2	Morrisons, Beaufort Road, Ebbw Vale	£3.45	£5.41	£2.43	£0.23	£1.65	£8.74	£21.93	5.0%	£23.08
2	B&M, Rhyd-Y-Blew, Ebbw Vale	£0.37	£0.22	£0.14	£0.03	£0.05	£0.21	£1.01	5.0%	£1.06
2	Rassau	£0.00	£0.04	£0.19	£0.00	£0.00	£0.00	£0.24	0.0%	£0.24
3	Asda, Lakeside Retail Park, Nanytyglo, Brynmawr	£1.48	£2.19	£10.02	£4.85	£4.81	£1.56	£24.91	5.0%	£26.22
3	Lakeside Retail Park, Nanytyglo, Brynmawr - Other	£0.23	£0.24	£0.89	£0.28	£0.46	£0.03	£2.11	5.0%	£2.23
3	Brynmawr Town Centre	£0.03	£0.02	£0.42	£0.13	£0.05	£0.00	£0.65	0.0%	£0.65
3	Nantyglo	£0.00	£0.00	£0.02	£0.00	£0.00	£0.00	£0.02	0.0%	£0.02
4	Co-op, 53 High Street, Blaina	£0.08	£0.00	£0.09	£0.77	£0.17	£0.00	£1.12	0.0%	£1.12
4	Blaina Town Centre - Other	£0.00	£0.00	£0.00	£0.11	£0.00	£0.00	£0.11	0.0%	£0.11
5	Tesco, Castle Street, Abertillery	£0.00	£0.00	£0.20	£0.59	£9.48	£0.00	£10.26	5.0%	£10.80
5	Iceland, 31 High Street, Abertillery	£0.00	£0.00	£0.02	£0.23	£2.40	£0.09	£2.74	0.0%	£2.74
5	Abertilllery Town Centre - Other	£0.00	£0.00	£0.04	£0.04	£0.46	£0.00	£0.55	0.0%	£0.55
5	Llanhilleth	£0.00	£0.00	£0.00	£0.00	£0.05	£0.00	£0.05	5.0%	£0.05
5	Aberbeeg	£0.00	£0.00	£0.00	£0.00	£0.12	£0.00	£0.12	5.0%	£0.13
6	Lidl, Gelli Road, Tredegar	£0.16	£0.04	£0.00	£0.02	£0.00	£6.78	£7.00	5.0%	£7.37
6	Tredegar Town Centre - Other	£0.00	£0.00	£0.00	£0.00	£0.03	£2.24	£2.27	0.0%	£2.27
	Total within Study Area	£24.82	£21.28	£20.09	£8.91	£23.93	£29.61	£128.63		£134.12
Outside	Asda, Dowlais Top, Merthyr Tydfil	£0.39	£0.57	£0.29	£0.03	£0.15	£2.16	£3.58		
Outside	Merthyr Tydfil - Other	£0.66	£0.13	£0.11	£0.20	£0.21	£0.57	£1.89		
Outside	Blackwood - Any Store	£0.19	£0.00	£0.00	£0.07	£3.37	£0.00	£3.63		
Outside	Risca - Any Store	£0.03	£0.12	£0.54	£0.29	£1.36	£0.00	£2.34		
Outside	Abergavenny - Any Store	£0.19	£0.00	£0.27	£0.42	£0.70	£0.00	£1.59		
Outside	Cwmbran - Any Store	£0.14	£0.00	£0.04	£0.11	£0.18	£0.00	£0.46		
Outside	Other	£0.10	£0.04	£0.07	£0.14	£0.41	£0.12	£0.88		
	Total	£26.51	£22.14	£21.42	£10.17	£30.31	£32.46	£143.00		

Table A8.10C: Convenience Turnover 2025

Zone	Convenience Turnover	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar	Total from Study Area	Estimated % Inflow from outside Study Area	Total Convenience Turnover (£m)
	Available Convenience Spend 2025 (£m)	£24.94	£20.69	£20.11	£9.52	£28.36	£30.39	£134.01		
1	Tesco, North West Approach, Ebbw Vale	£9.68	£5.75	£1.62	£0.42	£0.99	£6.20	£24.66	5.0%	£25.95
1	Aldi, The Walk, Ebbw Vale	£5.64	£5.12	£3.19	£0.94	£2.87	£2.81	£20.57	2.0%	£20.99
1	Iceland, Unit 1, Ebbw Vale Retail Park, Ebbw Vale	£1.81	£0.94	£0.40	£0.14	£0.00	£0.26	£3.55	2.0%	£3.63
1	Ebbw Vale Town Centre - Other	£0.67	£0.43	£0.06	£0.03	£0.07	£0.06	£1.32	2.0%	£1.34
1	Cwm	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	0.0%	£0.10
2	Morrisons, Beaufort Road, Ebbw Vale	£3.25	£5.06	£2.28	£0.22	£1.55	£8.19	£20.54	5.0%	£21.62
2	B&M, Rhyd-Y-Blew, Ebbw Vale	£0.34	£0.21	£0.13	£0.03	£0.05	£0.20	£0.95	5.0%	£1.00
2	Rassau	£0.00	£0.04	£0.18	£0.00	£0.00	£0.00	£0.22	0.0%	£0.22
3	Asda, Lakeside Retail Park, Nanytyglo, Brynmawr	£1.39	£2.04	£9.41	£4.54	£4.50	£1.46	£23.34	5.0%	£24.57
3	Lakeside Retail Park, Nanytyglo, Brynmawr - Other	£0.22	£0.22	£0.83	£0.26	£0.43	£0.03	£1.98	5.0%	£2.09
3	Brynmawr Town Centre	£0.03	£0.02	£0.40	£0.12	£0.05	£0.00	£0.61	0.0%	£0.61
3	Nantyglo	£0.00	£0.00	£0.02	£0.00	£0.00	£0.00	£0.02	0.0%	£0.02
4	Co-op, 53 High Street, Blaina	£0.08	£0.00	£0.09	£0.72	£0.16	£0.00	£1.05	0.0%	£1.05
4	Blaina Town Centre - Other	£0.00	£0.00	£0.00	£0.10	£0.00	£0.00	£0.10	0.0%	£0.10
5	Tesco, Castle Street, Abertillery	£0.00	£0.00	£0.19	£0.55	£8.87	£0.00	£9.60	5.0%	£10.11
5	Iceland, 31 High Street, Abertillery	£0.00	£0.00	£0.02	£0.21	£2.25	£0.08	£2.57	0.0%	£2.57
5	Abertilllery Town Centre - Other	£0.00	£0.00	£0.04	£0.04	£0.43	£0.00	£0.52	0.0%	£0.52
5	Llanhilleth	£0.00	£0.00	£0.00	£0.00	£0.05	£0.00	£0.05	5.0%	£0.05
5	Aberbeeg	£0.00	£0.00	£0.00	£0.00	£0.12	£0.00	£0.12	5.0%	£0.12
6	Lidl, Gelli Road, Tredegar	£0.15	£0.04	£0.00	£0.01	£0.00	£6.35	£6.55	5.0%	£6.90
6	Tredegar Town Centre - Other	£0.00	£0.00	£0.00	£0.00	£0.02	£2.10	£2.13	0.0%	£2.13
	Total within Study Area	£23.35	£19.88	£18.86	£8.33	£22.40	£27.73	£120.55		£125.69
Outside	Asda, Dowlais Top, Merthyr Tydfil	£0.37	£0.53	£0.27	£0.03	£0.14	£2.02	£3.36		
Outside	Merthyr Tydfil - Other	£0.62	£0.13	£0.11	£0.19	£0.20	£0.53	£1.77		
Outside	Blackwood - Any Store	£0.17	£0.00	£0.00	£0.07	£3.15	£0.00	£3.40		
Outside	Risca - Any Store	£0.03	£0.11	£0.51	£0.27	£1.27	£0.00	£2.19		
Outside	Abergavenny - Any Store	£0.18	£0.00	£0.26	£0.39	£0.66	£0.00	£1.49		
Outside	Cwmbran - Any Store	£0.13	£0.00	£0.04	£0.10	£0.17	£0.00	£0.43		
Outside	Other	£0.09	£0.04	£0.06	£0.13	£0.38	£0.11	£0.82		
	Total	£24.94	£20.69	£20.11	£9.52	£28.37	£30.40	£134.01		

Table A8.10D: Convenience Turnover 2030

Zone	Convenience Turnover	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar	Total from Study Area	Estimated % Inflow from outside Study Area	Total Convenience Turnover (£m)
	Available Convenience Spend 2030 (£m)	£24.58	£20.28	£19.81	£9.32	£27.77	£29.81	£131.57		
1	Tesco, North West Approach, Ebbw Vale	£9.54	£5.64	£1.60	£0.41	£0.97	£6.08	£24.23	5.0%	£25.51
1	Aldi, The Walk, Ebbw Vale	£5.56	£5.02	£3.14	£0.92	£2.81	£2.75	£20.21	2.0%	£20.62
1	Iceland, Unit 1, Ebbw Vale Retail Park, Ebbw Vale	£1.79	£0.93	£0.39	£0.14	£0.00	£0.26	£3.50	2.0%	£3.57
1	Ebbw Vale Town Centre - Other	£0.66	£0.43	£0.06	£0.03	£0.07	£0.05	£1.29	2.0%	£1.32
1	Cwm	£0.09	£0.00	£0.00	£0.00	£0.00	£0.00	£0.09	0.0%	£0.09
2	Morrisons, Beaufort Road, Ebbw Vale	£3.20	£4.96	£2.25	£0.21	£1.52	£8.03	£20.17	5.0%	£21.23
2	B&M, Rhyd-Y-Blew, Ebbw Vale	£0.34	£0.20	£0.13	£0.03	£0.04	£0.19	£0.93	5.0%	£0.98
2	Rassau	£0.00	£0.04	£0.18	£0.00	£0.00	£0.00	£0.22	0.0%	£0.22
3	Asda, Lakeside Retail Park, Nanytyglo, Brynmawr	£1.37	£2.00	£9.27	£4.45	£4.41	£1.43	£22.93	5.0%	£24.14
3	Lakeside Retail Park, Nanytyglo, Brynmawr - Other	£0.21	£0.22	£0.82	£0.25	£0.42	£0.03	£1.95	5.0%	£2.05
3	Brynmawr Town Centre	£0.02	£0.02	£0.39	£0.12	£0.05	£0.00	£0.60	0.0%	£0.60
3	Nantyglo	£0.00	£0.00	£0.02	£0.00	£0.00	£0.00	£0.02	0.0%	£0.02
4	Co-op, 53 High Street, Blaina	£0.08	£0.00	£0.09	£0.71	£0.16	£0.00	£1.03	0.0%	£1.03
4	Blaina Town Centre - Other	£0.00	£0.00	£0.00	£0.10	£0.00	£0.00	£0.10	0.0%	£0.10
5	Tesco, Castle Street, Abertillery	£0.00	£0.00	£0.18	£0.54	£8.68	£0.00	£9.40	5.0%	£9.90
5	Iceland, 31 High Street, Abertillery	£0.00	£0.00	£0.02	£0.21	£2.20	£0.08	£2.51	0.0%	£2.51
5	Abertilllery Town Centre - Other	£0.00	£0.00	£0.04	£0.04	£0.43	£0.00	£0.51	0.0%	£0.51
5	Llanhilleth	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.04	5.0%	£0.05
5	Aberbeeg	£0.00	£0.00	£0.00	£0.00	£0.11	£0.00	£0.11	5.0%	£0.12
6	Lidl, Gelli Road, Tredegar	£0.15	£0.04	£0.00	£0.01	£0.00	£6.23	£6.43	5.0%	£6.77
6	Tredegar Town Centre - Other	£0.00	£0.00	£0.00	£0.00	£0.02	£2.06	£2.09	0.0%	£2.09
	Total within Study Area	£23.01	£19.49	£18.58	£8.16	£21.93	£27.20	£118.37		£123.42
Outside	Asda, Dowlais Top, Merthyr Tydfil	£0.36	£0.52	£0.27	£0.03	£0.13	£1.98	£3.29		
Outside	Merthyr Tydfil - Other	£0.61	£0.12	£0.11	£0.19	£0.19	£0.52	£1.74		
Outside	Blackwood - Any Store	£0.17	£0.00	£0.00	£0.07	£3.09	£0.00	£3.33		
Outside	Risca - Any Store	£0.02	£0.11	£0.50	£0.27	£1.25	£0.00	£2.15		
Outside	Abergavenny - Any Store	£0.18	£0.00	£0.25	£0.39	£0.64	£0.00	£1.46		
Outside	Cwmbran - Any Store	£0.13	£0.00	£0.04	£0.10	£0.16	£0.00	£0.43		
Outside	Other	£0.09	£0.04	£0.06	£0.13	£0.37	£0.11	£0.81		
	Total	£24.58	£20.28	£19.81	£9.32	£27.77	£29.81	£131.58		

Table A8.10E: Convenience Turnover 2033

Zone	Convenience Turnover	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar	Total from Study Area	Estimated % Inflow from outside Study Area	Total Convenience Turnover (£m)
	Available Convenience Spend 2033 (£m)	£24.36	£20.11	£19.65	£9.22	£27.47	£29.51	£130.32		
1	Tesco, North West Approach, Ebbw Vale	£9.46	£5.59	£1.58	£0.40	£0.96	£6.02	£24.01	5.0%	£25.27
1	Aldi, The Walk, Ebbw Vale	£5.51	£4.98	£3.12	£0.91	£2.78	£2.72	£20.02	2.0%	£20.43
1	Iceland, Unit 1, Ebbw Vale Retail Park, Ebbw Vale	£1.77	£0.92	£0.39	£0.13	£0.00	£0.26	£3.47	2.0%	£3.54
1	Ebbw Vale Town Centre - Other	£0.65	£0.42	£0.06	£0.03	£0.07	£0.05	£1.28	2.0%	£1.31
1	Cwm	£0.09	£0.00	£0.00	£0.00	£0.00	£0.00	£0.09	0.0%	£0.09
2	Morrisons, Beaufort Road, Ebbw Vale	£3.17	£4.91	£2.23	£0.21	£1.50	£7.95	£19.98	5.0%	£21.03
2	B&M, Rhyd-Y-Blew, Ebbw Vale	£0.34	£0.20	£0.13	£0.03	£0.04	£0.19	£0.92	5.0%	£0.97
2	Rassau	£0.00	£0.04	£0.18	£0.00	£0.00	£0.00	£0.22	0.0%	£0.22
3	Asda, Lakeside Retail Park, Nanytyglo, Brynmawr	£1.36	£1.99	£9.19	£4.40	£4.36	£1.42	£22.72	5.0%	£23.91
3	Lakeside Retail Park, Nanytyglo, Brynmawr - Other	£0.21	£0.21	£0.81	£0.25	£0.41	£0.03	£1.93	5.0%	£2.03
3	Brynmawr Town Centre	£0.02	£0.02	£0.39	£0.12	£0.05	£0.00	£0.60	0.0%	£0.60
3	Nantyglo	£0.00	£0.00	£0.02	£0.00	£0.00	£0.00	£0.02	0.0%	£0.02
4	Co-op, 53 High Street, Blaina	£0.07	£0.00	£0.09	£0.70	£0.16	£0.00	£1.02	0.0%	£1.02
4	Blaina Town Centre - Other	£0.00	£0.00	£0.00	£0.10	£0.00	£0.00	£0.10	0.0%	£0.10
5	Tesco, Castle Street, Abertillery	£0.00	£0.00	£0.18	£0.53	£8.59	£0.00	£9.30	5.0%	£9.79
5	Iceland, 31 High Street, Abertillery	£0.00	£0.00	£0.02	£0.21	£2.18	£0.08	£2.49	0.0%	£2.49
5	Abertilllery Town Centre - Other	£0.00	£0.00	£0.04	£0.04	£0.42	£0.00	£0.50	0.0%	£0.50
5	Llanhilleth	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.04	5.0%	£0.05
5	Aberbeeg	£0.00	£0.00	£0.00	£0.00	£0.11	£0.00	£0.11	5.0%	£0.12
6	Lidl, Gelli Road, Tredegar	£0.14	£0.04	£0.00	£0.01	£0.00	£6.17	£6.36	5.0%	£6.70
6	Tredegar Town Centre - Other	£0.00	£0.00	£0.00	£0.00	£0.02	£2.04	£2.06	0.0%	£2.06
	Total within Study Area	£22.81	£19.33	£18.43	£8.08	£21.70	£26.92	£117.26		£122.26
Outside	Asda, Dowlais Top, Merthyr Tydfil	£0.36	£0.52	£0.27	£0.03	£0.13	£1.96	£3.26		
Outside	Merthyr Tydfil - Other	£0.61	£0.12	£0.10	£0.18	£0.19	£0.52	£1.73		
Outside	Blackwood - Any Store	£0.17	£0.00	£0.00	£0.07	£3.05	£0.00	£3.29		
Outside	Risca - Any Store	£0.02	£0.11	£0.50	£0.26	£1.23	£0.00	£2.13		
Outside	Abergavenny - Any Store	£0.18	£0.00	£0.25	£0.38	£0.64	£0.00	£1.45		
Outside	Cwmbran - Any Store	£0.12	£0.00	£0.04	£0.10	£0.16	£0.00	£0.42		
Outside	Other	£0.09	£0.04	£0.06	£0.13	£0.37	£0.11	£0.80		
	Total	£24.36	£20.11	£19.65	£9.22	£27.48	£29.51	£130.33		

6. Comparison Market Share

6.1. To derive the current market shares for comparison outlets, the first stage of the analysis has been to calculate how the total comparison spend per head provided in Table A8.4 relates to the categories of goods that were the subject of the household survey questions.

6.2. The expenditure by types of goods provided by Experian for the study area zones has therefore been assigned to the relevant household survey question as set out in Table A8.11 and the equivalent proportions are calculated in Table A8.12.

Table A8.11: Comparison Expenditure by Goods Category

Survey Question	Comparison Spend per head by Category (£) (2018 prices)	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
	Cothing materials and garments	£575	£611	£607	£566	£567	£597
	Shoes & Other Footwear	£119	£122	£123	£116	£114	£119
Q09 & Q11	Total Clothing & Footwear	£694	£733	£730	£682	£681	£716
	Appliances for personal care	£246	£254	£259	£236	£238	£255
	Medical goods & other pharmaceutical Products	£69	£85	£76	£65	£66	£78
	Therapeutic appliances and equipment	£38	£45	£37	£34	£35	£41
Q13	Personal care, medical and pharmaceutical products and therapeutic appliances	£353	£384	£372	£335	£339	£374
	Games, toys & hobbies; sport & camping equipment; musical instruments	£244	£270	£263	£239	£223	£268
	Bicycles	£8	£11	£9	£8	£8	£10
Q15	Games, toys, hobby items, sports goods (including bicycles) and recreation equipment	£252	£281	£272	£247	£231	£278
	Audio visual, photographic & info processing equipment	£160	£177	£184	£161	£158	£171
	Recording media	£68	£65	£69	£66	£67	£67
Q17	Audio visual, photographic & info processing equipment such as computers or phones and recording materials	£228	£242	£253	£227	£225	£238
	Furniture and furnishings; carpets & other floor coverings	£207	£225	£219	£203	£203	£225
Q19	Furniture and furnishings; carpets & other floor coverings	£207	£225	£219	£203	£203	£225
	Household textiles	£82	£96	£98	£80	£84	£96
	Glassware, tableware and household utensils	£95	£104	£101	£92	£94	£103
Q21	Items for the house such as household textiles, glassware, tableware and household utensils	£177	£200	£199	£172	£178	£199
	Jewellery, clocks and watches	£94	£102	£102	£88	£95	£103
	Other personal effects	£49	£61	£58	£49	£46	£55
Q23	Jewellery, clocks, watches and other personal effects (such as travel or baby goods)	£143	£163	£160	£137	£141	£158
	Book & stationary	£89	£97	£92	£85	£86	£93
Q25	Book & stationary	£89	£97	£92	£85	£86	£93
	Major household appliances whether electric or not	£72	£85	£82	£72	£69	£86
	Small electrical household appliances	£19	£21	£19	£19	£20	£21
Q27	Appliances for the home (electrical or not)	£91	£106	£101	£91	£89	£107
	Materials for maintenance & repair of the dwelling	£8	£8	£8	£8	£8	£8
	Major tools and equipment	£11	£12	£11	£10	£10	£12
	Small tools and miscellaneous accessories	£90	£106	£93	£89	£87	£100
	Pets and related products	£84	£86	£86	£85	£85	£87
	Gardens, plants and flowers	£62	£73	£66	£61	£60	£69
Q29	DIY goods and equipment, items for the garden including plants and pet and related products	£255	£285	£264	£253	£250	£276
N/a	Other (Non-durable household goods)	£4	£4	£4	£4	£4	£4
	Total	£2,493	£2,720	£2,666	£2,436	£2,427	£2,668

Notes

Available Expenditure per head from Experian

Table A8.12: Comparison Expenditure by Goods Category (%)

Survey Question	Comparison Spend by Goods Category (%)	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
Q09 & Q11	Total Clothing & Footwear	27.9%	27.0%	27.4%	28.0%	28.1%	26.9%
Q13	Personal care, medical and pharmaceutical products and therapeutic appliances	14.2%	14.1%	14.0%	13.8%	14.0%	14.0%
Q15	Games, toys, hobby items, sports goods (including bicycles) and recreation equipment	10.1%	10.3%	10.2%	10.2%	9.5%	10.4%
Q17	Audio visual, photographic & info processing equipment such as computers or phones and recording materials	9.2%	8.9%	9.5%	9.3%	9.3%	8.9%
Q19	Furniture and furnishings; carpets & other floor coverings	8.3%	8.3%	8.2%	8.3%	8.4%	8.4%
Q21	Items for the house such as household textiles, glassware, tableware and household utensils	7.1%	7.4%	7.5%	7.1%	7.3%	7.5%
Q23	Jewellery, clocks, watches and other personal effects (such as travel or baby goods)	5.7%	6.0%	6.0%	5.6%	5.8%	5.9%
Q25	Book & stationary	3.6%	3.6%	3.5%	3.5%	3.5%	3.5%
Q27	Appliances for the home (electrical or not)	3.7%	3.9%	3.8%	3.7%	3.7%	4.0%
Q29	DIY goods and equipment, items for the garden including plants and pet and related products	10.2%	10.5%	9.9%	10.4%	10.3%	10.4%
N/a	Other (Non-durable household goods)						
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Notes

Derived from Table A8.11

6.3. These percentages are then used to derive actual spend by goods category for the various centres and retail locations in 2018 the 'data' base year (Table A8.13).

Table A8.13: Comparison Expenditure by Goods Category in 2018 including SFT

Survey Question	Total Comparison Spend by Goods Category in Survey Area (£m)	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total	% All Comparison spend
	Available Expenditure 2018 (£m exc SFT)	£27.33	£23.85	£23.14	£10.48	£30.40	£34.14	£149.33	
Q09 & Q11	Total Clothing & Footwear	£7.62	£6.44	£6.34	£2.94	£8.54	£9.17	£41.06	27.5%
Q13	Personal care, medical and pharmaceutical products and therapeutic appliances	£3.88	£3.37	£3.23	£1.44	£4.25	£4.79	£20.97	14.0%
Q15	Games, toys, hobby items, sports goods (including bicycles) and recreation equipment	£2.77	£2.47	£2.36	£1.06	£2.90	£3.56	£15.12	10.1%
Q17	Audio visual, photographic & info processing equipment such as computers or phones and recording materials	£2.50	£2.12	£2.20	£0.98	£2.82	£3.05	£13.68	9.2%
Q19	Furniture and furnishings; carpets & other floor coverings	£2.27	£1.98	£1.90	£0.87	£2.55	£2.88	£12.46	8.3%
Q21	Items for the house such as household textiles, glassware, tableware and household utensils	£1.94	£1.76	£1.73	£0.74	£2.23	£2.55	£10.95	7.3%
Q23	Jewellery, clocks, watches and other personal effects (such as travel or baby goods)	£1.57	£1.43	£1.39	£0.59	£1.77	£2.02	£8.78	5.9%
Q25	Book & stationary	£0.98	£0.85	£0.80	£0.37	£1.08	£1.19	£5.27	3.5%
Q27	Appliances for the home (electrical or not)	£1.00	£0.93	£0.88	£0.39	£1.12	£1.37	£5.69	3.8%
Q29	DIY goods and equipment, items for the garden including plants and pet and related products	£2.80	£2.50	£2.29	£1.09	£3.14	£3.54	£15.36	10.3%
	Total / Average	£27.33	£23.85	£23.14	£10.48	£30.40	£34.14	£149.33	100.0%

Notes

Available Comparison Expenditure for 2018 from Table A8.5 (including SFT)

% spend from Table A8.12

6.4. This shows that clothing and footwear is the largest single area of comparison spend attracting 27.5% of all comparison expenditure (£41.06m of £149.33m). The next highest spend is on personal care items (14.0%). In contrast expenditure on books and stationery amounts to just 3.5% of total comparison spend and appliances to 3.8%.

6.5. This provides an indication of the relative importance of the different types of comparison goods, although these expenditure per head figures include spend made through SFT, not just that spent in physical locations.

6.6. The next stage is to combine the household survey results for the various categories of goods, to derive the overall market shares by centre / store location for all comparison spend. The starting point for this is the responses to the household survey questions Q09 – Q29.

6.7. As with the convenience goods, the responses from the survey have first been summarised and the results are presented in Tables A8.14, A8.15 and A8.17 – A8.25. Again, a number of tables are provided for each category of goods, in most cases with:

- Table A8.XA being an extract from the original household survey results;
- Table A8.XB being the same information but adjusted for null and multiple responses. This is necessary as the majority of questions were not limited to a single response; and
- Table A8.XC being the same information rebased to 100% but with SFT also removed.

6.8. The exception to this is the clothing and footwear tables. Given the level of clothing and footwear spend (more than a quarter of all comparison goods spend), two questions were included in the household survey and responses are provided on the destination for most clothing and footwear purchases (Q09) and the other destinations used (Q11).

6.9. The base results for both these questions are provided in Tables A8.14A and A8.15A respectively. However, there is only a single response to Q09 and the rebased responses excluding SFT are therefore provided in Table A8.14B.

Table A8.14B: Main Clothing & Footwear Location (Q09) - exc SFT and null responses

Zone	Main Clothing and Footwear Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	7.1%	21.2%	10.0%	4.1%	0.0%	3.3%	1.5%
1	Tesco, North West Approach, Ebbw Vale	0.8%	1.6%	0.0%	1.6%	0.0%	1.2%	0.0%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	10.3%	16.8%	12.6%	7.5%	11.9%	8.5%	6.4%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.2%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	3.7%	2.9%	1.6%	8.9%	10.7%	3.2%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	2.2%	0.0%	0.0%	9.0%	9.8%	0.0%	0.0%
3	Brynmawr Town Centre	0.6%	0.0%	0.0%	2.5%	2.5%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	1.9%	0.0%	0.0%	0.0%	0.0%	9.0%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	2.0%	1.4%	0.0%	1.7%	1.2%	1.2%	5.0%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	29.9%	32.0%	43.0%	25.2%	19.8%	3.8%	51.0%
Outside	Merthyr Tydfil - Elsewhere	1.2%	0.0%	1.6%	0.8%	0.0%	0.0%	3.5%
Outside	Cwmbran Town Centre	19.3%	6.6%	12.1%	23.4%	24.1%	45.5%	5.2%
Outside	Cwmbran - Elsewhere	1.5%	2.4%	0.0%	4.0%	2.2%	1.3%	0.0%
Outside	Cardiff City Centre	12.4%	10.6%	12.4%	5.6%	9.3%	12.5%	20.2%
Outside	Cardiff - Elsewhere	0.1%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%
Outside	Newport City Centre	1.5%	0.0%	1.6%	1.7%	2.3%	3.9%	0.0%
Outside	Newport - Elsewhere	0.5%	1.5%	0.0%	1.6%	0.0%	0.0%	0.0%
Outside	Other	4.2%	3.0%	3.5%	2.5%	6.2%	5.8%	5.0%
	Internet / delivered							
	Home catalogue							
	TV / Interactive shopping							
	Other							
	(Don't know)							
	(Don't do this type of shopping)							
	(Nowhere else)							
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.15C: Other Clothing & Footwear Shopping Destinations (Q11) - exc SFT

Zone	Other Clothing and Footwear Locations	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	4.8%	7.5%	4.7%	5.5%	10.3%	0.9%	5.1%
1	Tesco, North West Approach, Ebbw Vale	2.8%	6.5%	1.5%	0.0%	4.5%	2.1%	3.1%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	9.6%	12.8%	15.1%	5.1%	9.2%	5.4%	10.1%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.4%	0.7%	1.0%	0.0%	0.0%	0.0%	0.7%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	5.3%	3.1%	5.3%	6.4%	6.3%	8.8%	1.2%
3	Other Stores, Lakeside Retail Park, Brynmawr	3.8%	4.4%	3.6%	9.3%	0.0%	2.6%	2.0%
3	Brynmawr Town Centre	1.2%	0.0%	0.0%	7.2%	1.9%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	2.0%	0.0%	0.0%	1.4%	1.7%	6.8%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.6%	0.0%	0.0%	0.0%	0.0%	0.8%	1.9%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	2.4%	0.7%	4.7%	0.7%	0.0%	0.4%	6.5%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	18.1%	22.4%	22.5%	17.4%	10.4%	9.0%	24.9%
Outside	Merthyr Tydfil - Elsewhere	1.9%	0.7%	0.5%	0.0%	3.8%	0.0%	7.8%
Outside	Cwmbran Town Centre	16.6%	12.4%	13.1%	18.3%	17.7%	27.8%	7.6%
Outside	Cwmbran - Elsewhere	1.8%	0.7%	1.0%	2.1%	7.5%	2.9%	0.0%
Outside	Cardiff City Centre	15.1%	19.7%	14.3%	10.7%	12.8%	10.6%	22.0%
Outside	Cardiff - Elsewhere	0.6%	0.0%	0.0%	0.0%	1.8%	2.1%	0.0%
Outside	Newport City Centre	3.0%	2.4%	4.7%	4.3%	3.8%	3.5%	0.0%
Outside	Newport - Elsewhere	1.7%	1.2%	1.6%	1.4%	1.7%	3.4%	0.0%
Outside	Other	8.3%	4.9%	6.2%	10.2%	6.5%	12.6%	7.0%
	Internet / delivered							
	Home catalogue							
	TV / Interactive shopping							
	Other							
	(Don't know)							
	(Don't do this type of shopping)							
	(Nowhere else)							
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

6.10. The responses to the two questions are then combined in Table A8.15D to provide the market shares for clothing spend overall. This assumes that 65% of all clothing spend goes to the main destination (Q09 response) and 35% to the 'other' destinations.

Table A8.15D: Clothing & Footwear Market Shares

Zone	Overall Market Shares for Clothing and Footwear	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	6.3%	16.4%	8.1%	4.6%	3.6%	2.4%	2.8%
1	Tesco, North West Approach, Ebbw Vale	1.5%	3.3%	0.5%	1.0%	1.6%	1.5%	1.1%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	10.0%	15.4%	13.5%	6.6%	11.0%	7.5%	7.7%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.3%	0.2%	1.4%	0.0%	0.0%	0.0%	0.2%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	4.2%	3.0%	2.9%	8.0%	9.1%	5.2%	0.4%
3	Other Stores, Lakeside Retail Park, Brynmawr	2.7%	1.5%	1.3%	9.1%	6.4%	0.9%	0.7%
3	Brynmawr Town Centre	0.8%	0.0%	0.0%	4.1%	2.3%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	1.9%	0.0%	0.0%	0.5%	0.6%	8.3%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.5%	0.0%	0.0%	0.0%	0.0%	0.3%	2.1%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	2.1%	1.2%	1.7%	1.3%	0.8%	1.0%	5.5%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	25.8%	28.7%	35.8%	22.5%	16.5%	5.6%	41.9%
Outside	Merthyr Tydfil - Elsewhere	1.4%	0.2%	1.2%	0.5%	1.3%	0.0%	5.0%
Outside	Cwmbran Town Centre	18.4%	8.6%	12.5%	21.6%	21.9%	39.3%	6.0%
Outside	Cwmbran - Elsewhere	1.6%	1.8%	0.4%	3.4%	4.1%	1.9%	0.0%
Outside	Cardiff City Centre	13.4%	13.8%	13.1%	7.4%	10.5%	11.8%	20.8%
Outside	Cardiff - Elsewhere	0.3%	0.0%	0.0%	0.0%	0.6%	1.2%	0.0%
Outside	Newport City Centre	2.0%	0.8%	2.7%	2.6%	2.8%	3.8%	0.0%
Outside	Newport - Elsewhere	0.9%	1.4%	0.6%	1.5%	0.6%	1.2%	0.0%
Outside	Other	5.7%	3.7%	4.4%	5.2%	6.3%	8.2%	5.7%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Notes

Based on 65% spend at Main Clothing & Footwear destination (Table A8.14B) and 35% at 'Other' outlets (Table A8.15C)

6.11. This is informed by the responses to Q10 which indicate the proportion of spend made by respondents at their main clothing / footwear location. The results from this question are summarised in Table A8.16A, with the cumulative percentages set out in Table A8.16B. Null responses are excluded in Table A8.16C, where the median response for each of the zones is highlighted. This falls between 51% and 80% for all zones.

Table A8.16A: % Spend at Main Clothing / Footwear Location (Q10)

% Spend at Main Clothing & Footwear Location (Q10)	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
None	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1 - 10%	1.4%	2.7%	2.1%	0.6%	0.8%	0.0%	1.8%
11 - 20%	3.1%	5.7%	2.3%	6.1%	3.1%	1.5%	1.0%
21 - 30%	5.5%	5.6%	2.8%	10.4%	4.0%	7.1%	2.8%
31 - 40%	2.4%	3.1%	1.1%	3.0%	1.6%	2.1%	2.8%
41 - 50%	21.7%	23.2%	23.3%	17.1%	19.5%	26.7%	18.2%
51 - 60%	6.8%	3.6%	10.0%	11.1%	5.5%	2.9%	8.5%
61 - 70%	7.5%	4.1%	9.1%	3.6%	8.6%	8.0%	10.6%
71 - 80%	17.5%	15.8%	16.6%	14.4%	15.8%	22.2%	17.2%
81 - 90%	8.4%	8.1%	9.5%	8.5%	12.3%	11.6%	3.3%
91 - 99%	2.3%	4.2%	1.7%	1.8%	2.4%	3.6%	0.0%
100%	19.4%	18.2%	18.6%	16.4%	25.5%	12.9%	27.6%
(Don't know / varies)	4.2%	5.7%	2.9%	7.0%	0.8%	1.3%	6.2%

Table A8.16B: % Spend at Main Clothing / Footwear Location (Q10) - Cumulative

% Spend at Main Clothing & Footwear Shop (Q0)	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
None	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1 - 10%	1.4%	2.7%	2.1%	0.6%	0.8%	0.0%	1.8%
11 - 20%	4.4%	8.4%	4.4%	6.7%	3.9%	1.5%	2.7%
21 - 30%	9.9%	14.1%	7.2%	17.1%	7.9%	8.7%	5.6%
31 - 40%	12.3%	17.1%	8.3%	20.1%	9.5%	10.8%	8.4%
41 - 50%	34.0%	40.3%	31.6%	37.2%	28.9%	37.5%	26.6%
51 - 60%	40.8%	43.9%	41.6%	48.3%	34.5%	40.3%	35.1%
61 - 70%	48.2%	48.1%	50.7%	51.9%	43.1%	48.4%	45.7%
71 - 80%	65.7%	63.8%	67.4%	66.3%	58.9%	70.5%	62.9%
81 - 90%	74.1%	71.9%	76.8%	74.8%	71.2%	82.2%	66.2%
91 - 99%	76.4%	76.1%	78.5%	76.6%	73.7%	85.8%	66.2%
100%	95.8%	94.3%	97.1%	93.0%	99.2%	98.7%	93.8%
(Don't know / varies)	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.16C: % Spend at Main Clothing / Footwear Location (Q10) - Cumulative excluding null responses

% Spend at Main Clothing & Footwear Shop (Q0)	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
None	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1 - 10%	1.4%	2.9%	2.2%	0.7%	0.8%	0.0%	1.9%
11 - 20%	4.6%	9.0%	4.6%	7.2%	3.9%	1.6%	2.9%
21 - 30%	10.4%	14.9%	7.5%	18.4%	7.9%	8.8%	6.0%
31 - 40%	12.8%	18.2%	8.6%	21.6%	9.5%	10.9%	8.9%
41 - 50%	35.5%	42.7%	32.5%	40.0%	29.2%	38.0%	28.4%
51 - 60%	42.6%	46.6%	42.8%	51.9%	34.7%	40.9%	37.4%
61 - 70%	50.4%	50.9%	52.2%	55.8%	43.4%	49.0%	48.7%
71 - 80%	68.6%	67.6%	69.4%	71.3%	59.4%	71.5%	67.1%
81 - 90%	77.3%	76.2%	79.1%	80.4%	71.8%	83.2%	70.6%
91 - 99%	79.7%	80.7%	80.8%	82.4%	74.3%	86.9%	70.6%
100%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

6.12. The market shares for other non-food goods is as follows:

Table A8.17C: Personal Care Destinations (Q13) - exc null responses, rebased to 100% and exc SFT

Zone	Personal Care and Medical Goods Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	23.6%	59.3%	51.3%	6.3%	5.9%	7.0%	9.0%
1	Tesco, North West Approach, Ebbw Vale	5.3%	11.9%	9.6%	3.8%	0.5%	1.6%	3.5%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	0.3%	1.2%	0.0%	0.4%	0.0%	0.0%	0.0%
1	Zone 1 - Other	1.4%	7.6%	0.7%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	4.3%	3.2%	10.1%	4.3%	0.5%	1.1%	5.6%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	1.7%	3.2%	4.3%	0.8%	0.5%	1.3%	0.0%
2	Zone 2 - Other	1.0%	0.4%	3.0%	1.2%	0.0%	0.0%	1.1%
3	Asda, Lakeside Retail Park, Brynmawr	7.3%	1.5%	5.3%	17.2%	22.0%	7.4%	0.7%
3	Other Stores, Lakeside Retail Park, Brynmawr	4.9%	1.2%	1.8%	12.3%	8.1%	7.8%	0.0%
3	Brynmawr Town Centre	7.2%	0.0%	3.0%	40.2%	7.7%	0.3%	0.0%
3	Zone 3 - Other	0.2%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%
4	Blaina Town Centre	3.2%	0.0%	0.0%	3.7%	33.9%	0.3%	0.0%
5	Abertillery Town Centre	11.1%	0.0%	0.0%	0.0%	5.7%	43.8%	0.0%
5	Zone 5 - Other	0.8%	0.0%	0.0%	0.0%	0.0%	3.1%	0.0%
6	Tredegar Town Centre	13.3%	0.7%	0.7%	0.8%	0.0%	0.0%	67.3%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	0.4%	0.0%	1.1%	0.0%	1.5%	0.0%	0.8%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	4.1%	4.0%	5.0%	3.4%	3.6%	2.1%	6.6%
Outside	Merthyr Tydfil - Elsewhere	0.7%	0.0%	2.1%	0.4%	0.0%	0.3%	1.1%
Outside	Cwmbran Town Centre	2.9%	2.8%	0.0%	1.6%	5.3%	7.4%	0.0%
Outside	Cwmbran - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Cardiff City Centre	1.0%	0.8%	0.0%	0.0%	0.0%	2.5%	1.6%
Outside	Cardiff - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Newport City Centre	0.4%	0.0%	0.7%	0.0%	0.5%	0.8%	0.4%
Outside	Newport - Elsewhere	0.2%	0.4%	0.0%	0.8%	0.0%	0.0%	0.0%
Outside	Other	4.6%	1.7%	1.5%	1.3%	4.1%	13.1%	2.2%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.18C: Recreational Goods Market Share (Q15) - exc null responses and rebased to 100% and exc SFT

Zone	Personal Care and Medical Goods Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	17.5%	39.6%	18.4%	15.6%	10.4%	7.4%	14.9%
1	Tesco, North West Approach, Ebbw Vale	1.5%	1.9%	0.0%	0.0%	2.1%	1.1%	4.3%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	13.6%	14.9%	18.9%	9.6%	1.1%	12.0%	17.3%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	1.3%	0.0%	3.7%	0.0%	0.0%	0.0%	3.3%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.8%	3.1%	0.8%	0.0%	1.2%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	4.6%	0.0%	4.7%	15.6%	13.7%	3.1%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	3.1%	0.0%	2.3%	6.5%	7.9%	5.0%	0.0%
3	Brynmawr Town Centre	0.8%	0.0%	0.0%	4.9%	3.5%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	0.8%	0.0%	0.0%	0.0%	1.2%	2.5%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	1.5%	1.8%	1.4%	0.0%	0.0%	0.0%	5.2%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	13.1%	7.8%	16.6%	21.8%	2.3%	4.8%	27.9%
Outside	Merthyr Tydfil - Elsewhere	2.4%	0.0%	7.4%	0.0%	0.0%	1.2%	3.2%
Outside	Cwmbran Town Centre	12.7%	8.4%	2.2%	10.6%	16.0%	29.8%	2.1%
Outside	Cwmbran - Elsewhere	1.1%	1.0%	0.0%	0.0%	5.6%	1.7%	0.0%
Outside	Cardiff City Centre	10.7%	6.6%	12.7%	9.1%	20.9%	5.5%	16.5%
Outside	Cardiff - Elsewhere	0.3%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Newport City Centre	2.0%	0.0%	2.3%	0.0%	5.6%	3.7%	0.0%
Outside	Newport - Elsewhere	5.7%	9.1%	6.1%	0.0%	3.2%	9.9%	0.0%
Outside	Other	6.0%	3.9%	2.2%	6.3%	5.4%	12.2%	3.2%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.19C: Audio Visual Goods Market Share (Q17) - exc SFT and null responses and rebased to 100%

Zone	Audio Visual Goods Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	16.6%	30.6%	22.0%	15.6%	9.5%	10.4%	15.7%
1	Tesco, North West Approach, Ebbw Vale	2.8%	3.1%	2.5%	5.0%	0.0%	1.8%	4.1%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	0.3%	0.0%	0.0%	0.0%	4.0%	0.0%	0.0%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.8%	0.0%	0.0%	2.1%	0.0%	0.0%	2.1%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.2%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	4.5%	0.8%	5.3%	12.6%	11.6%	2.9%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	0.2%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%
3	Brynmawr Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	0.9%	0.0%	0.0%	0.0%	3.0%	3.3%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	1.5%	0.0%	5.9%	0.0%	0.0%	0.0%	2.7%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	48.1%	59.5%	58.3%	47.6%	46.8%	0.3%	65.5%
Outside	Merthyr Tydfil - Elsewhere	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%
Outside	Cwmbran Town Centre	3.1%	0.0%	1.2%	2.1%	6.9%	10.5%	0.0%
Outside	Cwmbran - Elsewhere	12.2%	1.5%	2.0%	7.4%	6.6%	50.6%	0.0%
Outside	Cardiff City Centre	1.8%	3.0%	1.3%	0.0%	4.0%	1.7%	2.8%
Outside	Cardiff - Elsewhere	0.2%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%
Outside	Newport City Centre	0.8%	0.0%	0.0%	2.8%	0.0%	1.8%	0.0%
Outside	Newport - Elsewhere	1.4%	0.0%	0.0%	0.0%	1.0%	6.9%	0.0%
Outside	Other	3.6%	1.5%	0.0%	3.4%	3.8%	9.8%	2.8%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.20C: Furniture, carpets & floor coverings Market Share (Q19) - exc SFT and null responses and rebased to 100%

Zone	Furniture / Carpets & Floor Coverings Goods Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	17.1%	32.6%	27.6%	11.4%	6.2%	8.1%	13.7%
1	Tesco, North West Approach, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	0.7%	0.0%	1.1%	0.0%	1.7%	0.0%	1.8%
1	Zone 1 - Other	0.7%	0.0%	0.0%	0.0%	1.6%	2.2%	0.6%
2	Morrisons, Beaufort Road, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.1%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	0.8%	0.0%	1.1%	2.0%	0.9%	0.9%	0.0%
3	Brynmawr Town Centre	5.0%	3.2%	6.9%	13.2%	8.1%	1.8%	1.2%
3	Zone 3 - Other	3.6%	3.6%	8.5%	6.6%	3.7%	0.8%	0.0%
4	Blaina Town Centre	1.3%	0.0%	1.8%	3.3%	6.2%	0.0%	0.0%
5	Abertillery Town Centre	6.4%	0.0%	0.0%	2.6%	12.3%	22.1%	0.0%
5	Zone 5 - Other	0.3%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%
6	Tredegar Town Centre	7.3%	1.9%	6.4%	1.4%	0.0%	0.0%	28.5%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	3.1%	6.1%	3.5%	2.0%	0.0%	1.4%	4.1%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	15.3%	14.1%	15.9%	20.3%	13.6%	5.8%	23.7%
Outside	Merthyr Tydfil - Elsewhere	1.6%	1.2%	0.6%	4.2%	0.9%	0.5%	2.4%
Outside	Cwmbran Town Centre	3.5%	4.2%	2.2%	0.0%	2.5%	9.5%	0.0%
Outside	Cwmbran - Elsewhere	3.9%	2.4%	0.0%	5.2%	4.2%	10.2%	0.0%
Outside	Cardiff City Centre	7.1%	7.4%	5.9%	4.6%	8.6%	6.8%	9.7%
Outside	Cardiff - Elsewhere	10.6%	8.0%	8.1%	9.8%	13.8%	14.3%	10.1%
Outside	Newport City Centre	1.0%	2.4%	0.0%	0.0%	0.9%	1.9%	0.6%
Outside	Newport - Elsewhere	3.9%	8.7%	1.7%	3.2%	7.1%	4.5%	0.6%
Outside	Other	6.7%	4.2%	8.8%	10.2%	5.9%	8.0%	3.0%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.21C: Items for the House Market Share (Q21) - exc SFT and null responses and rebased to 100%

Zone	Items for the House Goods Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	10.0%	24.2%	14.6%	5.4%	6.5%	5.6%	6.4%
1	Tesco, North West Approach, Ebbw Vale	5.6%	10.8%	5.9%	4.7%	1.5%	1.7%	8.7%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	5.8%	5.1%	10.4%	6.5%	5.6%	3.5%	4.9%
1	Zone 1 - Other	0.2%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	3.2%	5.9%	6.5%	1.7%	0.0%	0.0%	4.9%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	7.6%	8.2%	11.3%	1.1%	4.1%	7.8%	10.0%
2	Zone 2 - Other	0.3%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	9.7%	3.3%	12.6%	25.8%	17.9%	7.6%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	2.7%	1.2%	0.0%	4.5%	2.4%	5.4%	1.5%
3	Brynmawr Town Centre	0.4%	0.0%	0.0%	2.4%	0.8%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	2.2%	0.0%	0.0%	0.0%	1.5%	8.0%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	2.1%	0.0%	0.5%	0.0%	0.0%	0.0%	9.4%
6	Zone 6 Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	2.8%	2.5%	4.0%	2.4%	4.1%	0.0%	5.4%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	13.4%	12.5%	15.4%	19.4%	7.3%	3.5%	22.3%
Outside	Merthyr Tydfil - Elsewhere	3.9%	3.9%	3.5%	2.5%	3.4%	0.4%	9.6%
Outside	Cwmbran Town Centre	4.7%	3.9%	0.5%	3.7%	7.6%	11.8%	0.0%
Outside	Cwmbran - Elsewhere	3.3%	1.9%	0.0%	0.6%	5.6%	10.1%	0.0%
Outside	Cardiff City Centre	4.6%	3.2%	4.1%	2.3%	0.0%	6.4%	6.8%
Outside	Cardiff - Elsewhere	3.4%	3.2%	2.1%	1.7%	10.0%	4.6%	2.0%
Outside	Newport City Centre	1.0%	1.2%	0.0%	0.0%	5.8%	1.7%	0.0%
Outside	Newport - Elsewhere	7.5%	8.4%	5.2%	8.5%	8.7%	11.1%	3.3%
Outside	Other	5.5%	0.7%	2.4%	4.8%	7.3%	10.8%	4.9%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.22C: Personal Items Market Share (Q23) - exc SFT and null responses and rebased to 100%

Zone	Personal Items Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	18.6%	38.1%	33.1%	12.9%	12.5%	6.7%	11.9%
1	Tesco, North West Approach, Ebbw Vale	0.9%	1.0%	1.4%	0.0%	0.0%	0.0%	2.1%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	1.9%	2.0%	3.5%	1.0%	0.0%	0.0%	3.3%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.9%	2.1%	1.4%	0.0%	0.0%	0.0%	1.3%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	0.8%	2.0%	0.0%	3.1%	1.8%	0.0%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Brynmawr Town Centre	5.6%	0.0%	0.0%	32.4%	13.6%	1.2%	0.0%
3	Zone 3 - Other	0.1%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	8.2%	4.9%	3.5%	0.0%	5.4%	0.0%	26.6%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	6.6%	3.8%	7.2%	6.5%	3.6%	0.0%	14.5%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	6.8%	7.2%	7.3%	3.1%	0.0%	6.2%	10.4%
Outside	Merthyr Tydfil - Elsewhere	1.0%	1.0%	0.0%	0.0%	0.0%	0.0%	3.2%
Outside	Cwmbran Town Centre	17.0%	9.7%	7.4%	17.5%	26.0%	45.3%	0.0%
Outside	Cwmbran - Elsewhere	1.7%	0.0%	0.8%	0.0%	0.0%	6.9%	0.0%
Outside	Cardiff City Centre	17.8%	21.3%	20.5%	8.6%	23.5%	16.4%	19.3%
Outside	Cardiff - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Newport City Centre	1.8%	3.9%	0.0%	1.0%	1.8%	4.3%	0.0%
Outside	Newport - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Other	10.1%	3.0%	13.9%	14.0%	11.9%	11.7%	7.3%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.23C: Books and Stationery Market Share (Q25) - exc SFT and null responses and rebased to 100%

Zone	Books & Stationery Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	12.8%	32.8%	16.2%	7.4%	6.5%	5.1%	5.9%
1	Tesco, North West Approach, Ebbw Vale	11.1%	17.4%	10.5%	6.8%	6.6%	5.8%	16.6%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	7.0%	12.3%	11.3%	4.3%	6.5%	3.3%	4.3%
1	Zone 1 - Other	0.1%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	6.8%	7.8%	11.8%	2.5%	0.0%	0.6%	13.7%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	1.1%	0.0%	5.9%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	10.7%	4.9%	7.4%	27.1%	25.2%	10.4%	2.8%
3	Other Stores, Lakeside Retail Park, Brynmawr	2.7%	0.0%	0.0%	6.6%	0.0%	7.5%	0.0%
3	Brynmawr Town Centre	3.7%	2.3%	0.7%	18.6%	4.1%	0.6%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.7%	0.0%	0.0%	0.0%	11.7%	0.0%	0.0%
5	Abertillery Town Centre	4.8%	0.0%	0.0%	0.0%	8.2%	19.0%	0.0%
5	Zone 5 - Other	0.1%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%
6	Tredegar Town Centre	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	22.9%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	2.4%	0.8%	3.8%	1.6%	0.0%	0.0%	6.7%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil - Elsewhere	4.9%	1.5%	6.5%	0.9%	0.0%	0.6%	15.9%
Outside	Cwmbran Town Centre	7.4%	5.0%	4.7%	5.0%	8.1%	18.8%	0.8%
Outside	Cwmbran - Elsewhere	0.8%	0.0%	0.0%	0.0%	0.0%	3.6%	0.0%
Outside	Cardiff City Centre	5.1%	6.5%	3.8%	4.4%	5.0%	5.8%	4.7%
Outside	Cardiff - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Newport City Centre	0.8%	0.0%	0.0%	0.9%	2.5%	2.4%	0.0%
Outside	Newport - Elsewhere	0.2%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%
Outside	Other	12.2%	8.0%	16.3%	13.9%	15.6%	15.9%	5.7%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.24C: Household Appliances Market Share (Q27) - exc SFT and null responses and rebased to 100%

Zone	Household Appliance Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	22.0%	29.7%	32.0%	20.6%	17.3%	13.7%	21.0%
1	Tesco, North West Approach, Ebbw Vale	1.1%	3.5%	0.0%	2.9%	0.0%	0.0%	0.0%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	0.3%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	1.1%	2.1%	1.3%	0.0%	0.0%	1.3%	1.1%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.9%	0.7%	2.7%	0.0%	0.0%	0.0%	1.8%
2	Zone 2 - Other	1.2%	1.4%	1.3%	0.6%	3.0%	0.8%	1.2%
3	Asda, Lakeside Retail Park, Brynmawr	4.3%	2.2%	4.0%	10.6%	12.6%	2.6%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	0.2%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%
3	Brynmawr Town Centre	0.1%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	1.5%	0.0%	0.0%	0.0%	0.0%	6.0%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.9%	0.0%	1.2%	0.0%	0.0%	0.0%	3.6%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	0.3%	0.0%	0.0%	0.0%	1.0%	0.0%	1.1%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	45.0%	50.8%	52.9%	46.7%	44.9%	17.5%	66.1%
Outside	Merthyr Tydfil - Elsewhere	0.7%	0.0%	0.0%	1.7%	1.0%	0.4%	1.1%
Outside	Cwmbran Town Centre	1.9%	0.0%	1.3%	0.6%	0.0%	6.6%	0.0%
Outside	Cwmbran - Elsewhere	11.2%	4.1%	0.0%	6.9%	13.2%	34.7%	0.0%
Outside	Cardiff City Centre	1.7%	4.1%	0.7%	0.0%	1.0%	3.9%	0.0%
Outside	Cardiff - Elsewhere	0.8%	0.0%	0.7%	2.2%	0.0%	0.4%	1.1%
Outside	Newport City Centre	0.3%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%
Outside	Newport - Elsewhere	0.8%	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%
Outside	Other	3.7%	1.3%	2.0%	4.2%	3.9%	7.4%	1.7%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.25C: DIY, Garden & Pets Market Share (Q29) - exc SFT and null responses and rebased to 100%

Zone	DIY, Garden & Pets Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	16.2%	36.0%	26.7%	4.8%	14.6%	6.1%	12.3%
1	Tesco, North West Approach, Ebbw Vale	0.7%	0.5%	0.5%	0.0%	0.0%	1.9%	0.5%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	0.5%	0.5%	0.0%	0.0%	0.0%	0.3%	1.7%
1	Zone 1 - Other	4.2%	0.9%	5.7%	7.9%	4.0%	0.6%	7.5%
2	Morrisons, Beaufort Road, Ebbw Vale	0.9%	0.0%	1.4%	1.4%	0.0%	0.0%	2.2%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	11.9%	14.8%	19.2%	7.0%	4.1%	10.7%	11.1%
2	Zone 2 - Other	0.2%	0.0%	0.9%	0.0%	0.0%	0.0%	0.5%
3	Asda, Lakeside Retail Park, Brynmawr	1.0%	0.0%	1.4%	2.3%	0.7%	1.6%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	2.0%	0.9%	0.5%	4.5%	2.9%	1.6%	2.3%
3	Brynmawr Town Centre	5.8%	1.5%	5.0%	25.0%	7.1%	0.0%	0.9%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.4%	0.0%	0.0%	1.5%	2.2%	0.0%	0.0%
5	Abertillery Town Centre	5.9%	0.9%	0.0%	1.8%	4.9%	21.6%	0.0%
5	Zone 5 - Other	0.7%	0.0%	0.0%	0.0%	3.3%	2.0%	0.0%
6	Tredegar Town Centre	2.9%	0.0%	1.7%	0.0%	0.0%	0.0%	13.7%
6	Zone 6 - Other	1.8%	3.6%	0.5%	0.9%	0.7%	0.3%	4.1%
Outside	Merthyr Tydfil Town Centre	0.7%	2.3%	0.8%	0.0%	0.0%	0.0%	0.9%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	28.9%	35.5%	28.7%	30.1%	35.9%	12.8%	39.5%
Outside	Merthyr Tydfil - Elsewhere	0.9%	1.8%	0.5%	1.5%	2.0%	0.0%	1.0%
Outside	Cwmbran Town Centre	1.3%	0.0%	0.0%	0.0%	0.7%	5.2%	0.0%
Outside	Cwmbran - Elsewhere	8.6%	0.9%	2.2%	5.5%	7.8%	27.3%	0.9%
Outside	Cardiff City Centre	0.1%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%
Outside	Cardiff - Elsewhere	0.2%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%
Outside	Newport City Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%
Outside	Newport - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Other	3.8%	0.0%	3.6%	5.8%	9.1%	6.3%	1.0%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

6.13. The overall comparison goods market shares are set out in Table A8.26 using the estimated proportions of spend set out in Table A8.12.

Table A8.26: Overall Comparison Market Shares

Zone	Overall Comparison Market Share	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	14.6%	32.4%	23.3%	8.8%	7.9%	6.1%	9.6%
1	Tesco, North West Approach, Ebbw Vale	2.5%	4.7%	2.7%	2.0%	1.1%	1.5%	3.0%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	5.1%	6.9%	7.1%	3.6%	4.3%	3.6%	4.9%
1	Zone 1 - Other	0.7%	1.2%	0.8%	0.8%	0.6%	0.2%	0.8%
2	Morrisons, Beaufort Road, Ebbw Vale	1.6%	1.4%	3.4%	1.2%	0.1%	0.2%	2.6%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	2.2%	2.9%	3.8%	0.9%	0.9%	1.9%	2.0%
2	Zone 2 - Other	0.3%	0.1%	0.7%	0.3%	0.3%	0.0%	0.3%
3	Asda, Lakeside Retail Park, Brynmawr	4.5%	1.7%	4.0%	11.1%	10.9%	4.3%	0.3%
3	Other Stores, Lakeside Retail Park, Brynmawr	2.3%	0.8%	1.0%	6.1%	4.5%	2.7%	0.5%
3	Brynmawr Town Centre	2.8%	0.5%	1.5%	13.6%	4.5%	0.3%	0.2%
3	Zone 3 - Other	0.3%	0.3%	0.7%	0.7%	0.3%	0.1%	0.0%
4	Blaina Town Centre	0.6%	0.0%	0.1%	0.9%	5.8%	0.0%	0.0%
5	Abertillery Town Centre	3.8%	0.1%	0.0%	0.5%	3.3%	14.6%	0.0%
5	Zone 5 - Other	0.2%	0.0%	0.0%	0.0%	0.3%	0.8%	0.0%
6	Tredegar Town Centre	3.8%	0.5%	1.1%	0.2%	0.3%	0.1%	17.5%
6	Zone 6 - Other	0.2%	0.4%	0.0%	0.1%	0.1%	0.0%	0.4%
Outside	Merthyr Tydfil Town Centre	2.0%	1.7%	2.5%	1.2%	1.0%	0.4%	4.4%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	20.8%	22.8%	25.3%	21.4%	16.8%	5.4%	32.0%
Outside	Merthyr Tydfil - Elsewhere	1.5%	0.7%	2.0%	1.0%	0.9%	0.3%	3.8%
Outside	Cwmbran Town Centre	9.1%	5.0%	4.6%	9.0%	11.7%	21.7%	1.9%
Outside	Cwmbran - Elsewhere	3.7%	1.3%	0.6%	2.9%	4.4%	11.6%	0.1%
Outside	Cardiff City Centre	7.3%	7.3%	7.2%	4.2%	7.7%	6.7%	10.4%
Outside	Cardiff - Elsewhere	1.3%	1.1%	0.9%	1.1%	2.0%	2.0%	1.1%
Outside	Newport City Centre	1.2%	0.7%	1.1%	1.1%	2.1%	2.4%	0.1%
Outside	Newport - Elsewhere	1.9%	2.7%	1.4%	1.4%	1.8%	3.2%	0.3%
Outside	Other	5.7%	2.7%	4.4%	5.8%	6.6%	9.8%	3.8%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Notes

Derived from Tables A8.12 , A8.13, A8.15D, A8.17D - A8.25D

7. Comparison Turnover by Location

7.1. The resulting turnover for the individual locations based on the 2020 household survey market shares is then provided in Tables A8.27A – A8.27E for the years 2018 (the 'data' base year), 2020, 2025, 2030 and 2033.

7.2. This represents the comparison turnover to these stores and locations coming from within the study area.

7.3. To estimate inflows from the wider area, the same approach has been adopted as for convenience inflows and, in most cases, the same % inflow has been assumed. This reflects the relatively limited comparison offer in the Blaenau Gwent centres compared with the surrounding area meaning that most comparison flow inflow is likely to be linked to convenience shopping.

7.4. The resulting comparison turnover including inflow is included within Tables A8.27A-E.

Table A8.27A : Comparison Turnover 2018

Zone	Comparison Turnover	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar	Total from Study Area	Estimated % Inflow from outside Study Area	Total Comparison Turnover (£m)
	Available Comparison Spend 2018 (£m)	**£27.33**	**£23.85**	**£23.14**	**£10.48**	**£30.40**	**£34.14**	**£149.33**		
1	Ebbw Vale Town Centre	£8.85	£5.56	£2.05	£0.82	£1.86	£3.29	£22.42	5%	£23.61
1	Tesco, North West Approach, Ebbw Vale	£1.29	£0.63	£0.46	£0.11	£0.44	£1.02	£3.96	5%	£4.17
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	£1.90	£1.69	£0.84	£0.45	£1.11	£1.68	£7.66	50%	£15.33
1	Zone 1 - Other	£0.33	£0.18	£0.18	£0.06	£0.07	£0.28	£1.11	0%	£1.11
2	Morrisons, Beaufort Road, Ebbw Vale	£0.39	£0.80	£0.27	£0.01	£0.07	£0.88	£2.41	5%	£2.54
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	£0.79	£0.92	£0.21	£0.09	£0.56	£0.67	£3.24	5%	£3.41
2	Zone 2 - Other	£0.03	£0.16	£0.08	£0.03	£0.01	£0.09	£0.39	0%	£0.39
3	Asda, Lakeside Retail Park, Brynmawr	£0.47	£0.95	£2.56	£1.14	£1.29	£0.11	£6.52	5%	£6.86
3	Other Stores, Lakeside Retail Park, Brynmawr	£0.21	£0.23	£1.41	£0.47	£0.83	£0.19	£3.35	5%	£3.53
3	Brynmawr Town Centre	£0.13	£0.37	£3.14	£0.47	£0.08	£0.06	£4.26	0%	£4.26
3	Zone 3 - Other	£0.08	£0.17	£0.17	£0.03	£0.03	£0.00	£0.48	0%	£0.48
4	Blaina Town Centre	£0.00	£0.04	£0.22	£0.61	£0.01	£0.00	£0.87	0%	£0.87
5	Abertillery Town Centre	£0.02	£0.00	£0.12	£0.34	£4.44	£0.00	£4.93	5%	£5.19
5	Zone 5 - Other	£0.00	£0.00	£0.00	£0.04	£0.24	£0.00	£0.27	0%	£0.27
6	Tredegar Town Centre	£0.15	£0.26	£0.05	£0.03	£0.02	£5.96	£6.48	5%	£6.82
6	Zone 6 - Other	£0.10	£0.01	£0.02	£0.01	£0.01	£0.14	£0.30	0%	£0.30
	Total within Study Area	£14.73	£11.97	£11.78	£4.72	£11.10	£14.38	£68.68		
Outside	Merthyr Tydfil Town Centre	£0.46	£0.60	£0.27	£0.10	£0.12	£1.49	£3.04		
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	£6.22	£6.02	£4.96	£1.76	£1.65	£10.92	£31.54		
Outside	Merthyr Tydfil - Elsewhere	£0.20	£0.47	£0.23	£0.10	£0.08	£1.31	£2.39		
Outside	Cwmbran Town Centre	£1.37	£1.09	£2.07	£1.23	£6.58	£0.64	£12.98		
Outside	Cwmbran - Elsewhere	£0.36	£0.13	£0.67	£0.46	£3.53	£0.03	£5.18		
Outside	Cardiff City Centre	£2.01	£1.72	£0.96	£0.81	£2.04	£3.56	£11.10		
Outside	Cardiff - Elsewhere	£0.30	£0.20	£0.26	£0.21	£0.60	£0.36	£1.94		
Outside	Newport City Centre	£0.20	£0.25	£0.25	£0.22	£0.74	£0.04	£1.70		
Outside	Newport - Elsewhere	£0.73	£0.32	£0.33	£0.19	£0.98	£0.10	£2.66		
Outside	Other	£0.74	£1.05	£1.35	£0.69	£2.99	£1.31	£8.13		
	Total	£27.33	£23.85	£23.14	£10.48	£30.40	£34.14	£149.33		

Table A8.27B : Comparison Turnover 2020

Zone	Comparison Turnover	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar	Total from Study Area	Estimated % Inflow from outside Study Area	Total Comparison Turnover (£m)
	Available Comparison Spend 2020 (£m)	**£24.15**	**£21.16**	**£20.40**	**£9.24**	**£26.81**	**£30.14**	**£131.90**		
1	Ebbw Vale Town Centre	£7.82	£4.93	£1.80	£0.73	£1.64	£2.90	£19.83	5%	£20.87
1	Tesco, North West Approach, Ebbw Vale	£1.14	£0.56	£0.40	£0.10	£0.39	£0.90	£3.50	5%	£3.68
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	£1.68	£1.50	£0.74	£0.40	£0.98	£1.48	£6.77	50%	£13.55
1	Zone 1 - Other	£0.29	£0.16	£0.16	£0.05	£0.07	£0.25	£0.98	0%	£0.98
2	Morrisons, Beaufort Road, Ebbw Vale	£0.34	£0.71	£0.23	£0.01	£0.06	£0.78	£2.13	5%	£2.25
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	£0.70	£0.81	£0.18	£0.08	£0.50	£0.59	£2.87	5%	£3.02
2	Zone 2 - Other	£0.03	£0.14	£0.07	£0.02	£0.01	£0.08	£0.35	0%	£0.35
3	Asda, Lakeside Retail Park, Brynmawr	£0.41	£0.84	£2.26	£1.00	£1.14	£0.09	£5.75	5%	£6.06
3	Other Stores, Lakeside Retail Park, Brynmawr	£0.19	£0.21	£1.25	£0.42	£0.73	£0.16	£2.96	5%	£3.11
3	Brynmawr Town Centre	£0.12	£0.33	£2.77	£0.42	£0.07	£0.06	£3.76	0%	£3.76
3	Zone 3 - Other	£0.07	£0.15	£0.15	£0.03	£0.03	£0.00	£0.43	0%	£0.43
4	Blaina Town Centre	£0.00	£0.03	£0.19	£0.54	£0.01	£0.00	£0.77	0%	£0.77
5	Abertillery Town Centre	£0.02	£0.00	£0.11	£0.30	£3.92	£0.00	£4.35	5%	£4.58
5	Zone 5 - Other	£0.00	£0.00	£0.00	£0.03	£0.21	£0.00	£0.24	0%	£0.24
6	Tredegar Town Centre	£0.13	£0.23	£0.05	£0.03	£0.02	£5.26	£5.72	5%	£6.02
6	Zone 6 - Other	£0.09	£0.01	£0.02	£0.01	£0.01	£0.13	£0.26	0%	£0.26
	Total within Study Area	£13.02	£10.62	£10.38	£4.16	£9.79	£12.69	£60.67		
Outside	Merthyr Tydfil Town Centre	£0.41	£0.53	£0.24	£0.09	£0.10	£1.32	£2.68		
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	£5.50	£5.34	£4.37	£1.55	£1.45	£9.64	£27.86		
Outside	Merthyr Tydfil - Elsewhere	£0.18	£0.42	£0.20	£0.09	£0.07	£1.16	£2.11		
Outside	Cwmbran Town Centre	£1.21	£0.97	£1.83	£1.08	£5.80	£0.56	£11.46		
Outside	Cwmbran - Elsewhere	£0.32	£0.12	£0.59	£0.40	£3.11	£0.03	£4.57		
Outside	Cardiff City Centre	£1.77	£1.53	£0.85	£0.71	£1.80	£3.14	£9.81		
Outside	Cardiff - Elsewhere	£0.26	£0.18	£0.23	£0.19	£0.53	£0.32	£1.71		
Outside	Newport City Centre	£0.18	£0.23	£0.22	£0.20	£0.65	£0.03	£1.50		
Outside	Newport - Elsewhere	£0.65	£0.29	£0.29	£0.17	£0.87	£0.09	£2.35		
Outside	Other	£0.65	£0.93	£1.19	£0.61	£2.64	£1.16	£7.18		
	Total	£24.15	£21.16	£20.40	£9.24	£26.81	£30.14	£131.90		

Table A8.27C : Comparison Turnover 2025

Zone	Comparison Turnover	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar	Total from Study Area	Estimated % Inflow from outside Study Area	Total Comparison Turnover (£m)
	Available Comparison Spend 2025 (£m)	**£28.60**	**£24.89**	**£24.11**	**£10.89**	**£31.59**	**£35.53**	**£155.60**		
1	Ebbw Vale Town Centre	£9.26	£5.80	£2.13	£0.85	£1.94	£3.42	£23.40	5%	£24.64
1	Tesco, North West Approach, Ebbw Vale	£1.35	£0.66	£0.48	£0.12	£0.46	£1.07	£4.13	5%	£4.35
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	£1.99	£1.76	£0.88	£0.47	£1.15	£1.75	£7.99	50%	£15.98
1	Zone 1 - Other	£0.34	£0.19	£0.19	£0.06	£0.08	£0.29	£1.15	0%	£1.15
2	Morrisons, Beaufort Road, Ebbw Vale	£0.40	£0.84	£0.28	£0.01	£0.07	£0.92	£2.52	5%	£2.65
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	£0.82	£0.96	£0.21	£0.10	£0.59	£0.70	£3.38	5%	£3.56
2	Zone 2 - Other	£0.03	£0.17	£0.08	£0.03	£0.01	£0.09	£0.41	0%	£0.41
3	Asda, Lakeside Retail Park, Brynmawr	£0.49	£0.99	£2.67	£1.18	£1.35	£0.11	£6.79	5%	£7.14
3	Other Stores, Lakeside Retail Park, Brynmawr	£0.22	£0.25	£1.47	£0.49	£0.87	£0.19	£3.49	5%	£3.67
3	Brynmawr Town Centre	£0.14	£0.38	£3.27	£0.49	£0.09	£0.07	£4.44	0%	£4.44
3	Zone 3 - Other	£0.08	£0.18	£0.18	£0.03	£0.03	£0.00	£0.50	0%	£0.50
4	Blaina Town Centre	£0.00	£0.04	£0.23	£0.63	£0.01	£0.00	£0.91	0%	£0.91
5	Abertillery Town Centre	£0.03	£0.00	£0.13	£0.36	£4.62	£0.00	£5.13	5%	£5.39
5	Zone 5 - Other	£0.00	£0.00	£0.00	£0.04	£0.25	£0.00	£0.28	0%	£0.28
6	Tredegar Town Centre	£0.16	£0.27	£0.05	£0.03	£0.03	£6.20	£6.75	5%	£7.10
6	Zone 6 - Other	£0.11	£0.01	£0.02	£0.01	£0.01	£0.15	£0.31	0%	£0.31
	Total within Study Area	£15.42	£12.49	£12.27	£4.90	£11.53	£14.96	£71.58		
Outside	Merthyr Tydfil Town Centre	£0.48	£0.63	£0.28	£0.10	£0.12	£1.55	£3.16		
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	£6.51	£6.29	£5.17	£1.83	£1.71	£11.36	£32.87		
Outside	Merthyr Tydfil - Elsewhere	£0.21	£0.49	£0.24	£0.10	£0.08	£1.36	£2.49		
Outside	Cwmbran Town Centre	£1.43	£1.14	£2.16	£1.27	£6.84	£0.66	£13.51		
Outside	Cwmbran - Elsewhere	£0.38	£0.14	£0.70	£0.48	£3.67	£0.03	£5.39		
Outside	Cardiff City Centre	£2.10	£1.80	£1.01	£0.84	£2.12	£3.71	£11.57		
Outside	Cardiff - Elsewhere	£0.31	£0.21	£0.27	£0.22	£0.63	£0.37	£2.02		
Outside	Newport City Centre	£0.21	£0.27	£0.26	£0.23	£0.76	£0.04	£1.77		
Outside	Newport - Elsewhere	£0.77	£0.34	£0.34	£0.20	£1.02	£0.11	£2.77		
Outside	Other	£0.77	£1.10	£1.41	£0.71	£3.11	£1.36	£8.46		
	Total	£28.60	£24.89	£24.11	£10.89	£31.59	£35.53	£155.60		

Table A8.27D : Comparison Turnover 2030

Zone	Comparison Turnover	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar	Total from Study Area	Estimated % Inflow from outside Study Area	Total Comparison Turnover (£m)
	Available Comparison Spend 2030 (£m)	**£31.77**	**£27.50**	**£26.77**	**£12.02**	**£34.86**	**£39.28**	**£172.21**		
1	Ebbw Vale Town Centre	£10.29	£6.41	£2.37	£0.94	£2.14	£3.78	£25.93	5%	£27.29
1	Tesco, North West Approach, Ebbw Vale	£1.50	£0.73	£0.53	£0.13	£0.51	£1.18	£4.57	5%	£4.81
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	£2.21	£1.95	£0.97	£0.52	£1.27	£1.93	£8.85	50%	£17.69
1	Zone 1 - Other	£0.38	£0.21	£0.21	£0.07	£0.09	£0.33	£1.28	0%	£1.28
2	Morrisons, Beaufort Road, Ebbw Vale	£0.45	£0.93	£0.31	£0.01	£0.08	£1.02	£2.78	5%	£2.93
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	£0.92	£1.06	£0.24	£0.11	£0.65	£0.77	£3.74	5%	£3.94
2	Zone 2 - Other	£0.04	£0.19	£0.09	£0.03	£0.01	£0.10	£0.45	0%	£0.45
3	Asda, Lakeside Retail Park, Brynmawr	£0.54	£1.09	£2.97	£1.31	£1.48	£0.12	£7.52	5%	£7.91
3	Other Stores, Lakeside Retail Park, Brynmawr	£0.25	£0.27	£1.64	£0.54	£0.96	£0.21	£3.87	5%	£4.07
3	Brynmawr Town Centre	£0.16	£0.42	£3.64	£0.54	£0.10	£0.07	£4.93	0%	£4.93
3	Zone 3 - Other	£0.09	£0.19	£0.20	£0.04	£0.04	£0.00	£0.56	0%	£0.56
4	Blaina Town Centre	£0.00	£0.04	£0.25	£0.70	£0.01	£0.00	£1.01	0%	£1.01
5	Abertillery Town Centre	£0.03	£0.00	£0.14	£0.39	£5.09	£0.00	£5.66	5%	£5.96
5	Zone 5 - Other	£0.00	£0.00	£0.00	£0.04	£0.27	£0.00	£0.31	0%	£0.31
6	Tredegar Town Centre	£0.17	£0.30	£0.06	£0.04	£0.03	£6.86	£7.46	5%	£7.85
6	Zone 6 - Other	£0.12	£0.01	£0.02	£0.01	£0.01	£0.17	£0.34	0%	£0.34
	Total within Study Area	£17.13	£13.81	£13.63	£5.42	£12.73	£16.54	£79.25		
Outside	Merthyr Tydfil Town Centre	£0.53	£0.69	£0.31	£0.12	£0.14	£1.71	£3.50		
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	£7.24	£6.95	£5.74	£2.02	£1.89	£12.56	£36.40		
Outside	Merthyr Tydfil - Elsewhere	£0.24	£0.54	£0.26	£0.11	£0.09	£1.51	£2.75		
Outside	Cwmbran Town Centre	£1.59	£1.26	£2.40	£1.41	£7.55	£0.73	£14.94		
Outside	Cwmbran - Elsewhere	£0.42	£0.15	£0.78	£0.53	£4.05	£0.04	£5.96		
Outside	Cardiff City Centre	£2.33	£1.99	£1.12	£0.93	£2.34	£4.10	£12.80		
Outside	Cardiff - Elsewhere	£0.34	£0.24	£0.31	£0.24	£0.69	£0.41	£2.23		
Outside	Newport City Centre	£0.24	£0.29	£0.29	£0.25	£0.84	£0.04	£1.96		
Outside	Newport - Elsewhere	£0.85	£0.37	£0.38	£0.22	£1.13	£0.12	£3.07		
Outside	Other	£0.86	£1.21	£1.56	£0.79	£3.43	£1.51	£9.36		
	Total	£31.77	£27.50	£26.77	£12.02	£34.86	£39.28	£172.21		

Table A8.27E : Comparison Turnover 2033

Zone	Comparison Turnover	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar	Total from Study Area	Estimated % Inflow from outside Study Area	Total Comparison Turnover (£m)
	Available Comparison Spend 2033 (£m)	**£33.95**	**£29.40**	**£28.62**	**£12.82**	**£37.18**	**£41.91**	**£183.88**		
1	Ebbw Vale Town Centre	£10.99	£6.85	£2.53	£1.01	£2.28	£4.04	£27.69	5%	£29.15
1	Tesco, North West Approach, Ebbw Vale	£1.60	£0.78	£0.57	£0.14	£0.54	£1.26	£4.88	5%	£5.14
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	£2.36	£2.08	£1.04	£0.55	£1.36	£2.06	£9.45	50%	£18.89
1	Zone 1 - Other	£0.41	£0.23	£0.22	£0.07	£0.09	£0.35	£1.37	0%	£1.37
2	Morrisons, Beaufort Road, Ebbw Vale	£0.48	£0.99	£0.33	£0.01	£0.08	£1.08	£2.97	5%	£3.13
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	£0.98	£1.13	£0.25	£0.12	£0.69	£0.83	£3.99	5%	£4.20
2	Zone 2 - Other	£0.04	£0.20	£0.10	£0.03	£0.01	£0.11	£0.49	0%	£0.49
3	Asda, Lakeside Retail Park, Brynmawr	£0.58	£1.17	£3.17	£1.39	£1.58	£0.13	£8.03	5%	£8.45
3	Other Stores, Lakeside Retail Park, Brynmawr	£0.26	£0.29	£1.75	£0.58	£1.02	£0.23	£4.13	5%	£4.35
3	Brynmawr Town Centre	£0.17	£0.45	£3.89	£0.58	£0.10	£0.08	£5.27	0%	£5.27
3	Zone 3 - Other	£0.10	£0.21	£0.21	£0.04	£0.04	£0.00	£0.60	0%	£0.60
4	Blaina Town Centre	£0.00	£0.04	£0.27	£0.75	£0.01	£0.00	£1.07	0%	£1.07
5	Abertillery Town Centre	£0.03	£0.00	£0.15	£0.42	£5.43	£0.00	£6.03	5%	£6.35
5	Zone 5 - Other	£0.00	£0.00	£0.00	£0.04	£0.29	£0.00	£0.33	0%	£0.33
6	Tredegar Town Centre	£0.18	£0.32	£0.06	£0.04	£0.03	£7.32	£7.96	5%	£8.38
6	Zone 6 - Other	£0.13	£0.01	£0.02	£0.01	£0.01	£0.18	£0.36	0%	£0.36
	Total within Study Area	£18.30	£14.76	£14.56	£5.78	£13.57	£17.65	£84.63		
Outside	Merthyr Tydfil Town Centre	£0.57	£0.74	£0.33	£0.12	£0.14	£1.83	£3.74		
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	£7.73	£7.43	£6.14	£2.15	£2.02	£13.41	£38.87		
Outside	Merthyr Tydfil - Elsewhere	£0.25	£0.58	£0.28	£0.12	£0.09	£1.61	£2.94		
Outside	Cwmbran Town Centre	£1.70	£1.35	£2.56	£1.50	£8.05	£0.78	£15.95		
Outside	Cwmbran - Elsewhere	£0.45	£0.16	£0.83	£0.56	£4.31	£0.04	£6.36		
Outside	Cardiff City Centre	£2.49	£2.13	£1.19	£0.99	£2.49	£4.37	£13.66		
Outside	Cardiff - Elsewhere	£0.37	£0.25	£0.33	£0.26	£0.74	£0.44	£2.39		
Outside	Newport City Centre	£0.25	£0.31	£0.31	£0.27	£0.90	£0.05	£2.09		
Outside	Newport - Elsewhere	£0.91	£0.40	£0.41	£0.23	£1.20	£0.13	£3.28		
Outside	Other	£0.92	£1.30	£1.67	£0.84	£3.66	£1.61	£9.99		
	Total	£33.95	£29.40	£28.62	£12.82	£37.18	£41.91	£183.88		

8. Convenience and Comparison Capacity Assessment

8.1. The final stage of the process is to use this information to estimate how retail capacity may change in the future and the effect this will have on the need for retail floorspace.

8.2. For the baseline analysis this has been done assuming a 'constant market share' approach, meaning that it is assumed that there will be no change in the proportion of trade centres and retail outlets in Blaenau Gwent attract in the future compared to what they are achieving now, as indicated by the 2020 Household Survey.

8.3. This is a reasonable assumption for this level of analysis given the size of the study area and the 'constant market share' approach is widely used in strategic retail capacity forecasting. Any under- or over-trading at an individual store is likely to be balanced out by higher / lower spend elsewhere within the study area and the overall market share would not be affected. However, it does not take into account the effect changes in provision may have on shopping patterns, whether through the development of 'committed' developments or store closures, either within or outside the study area. This is therefore considered separately in the main report.

8.4. Although there is expected to be an increase in available comparison expenditure (as set out in Table A8.5) within the study area, it is not necessarily the case that this would be expected to lead to a need for additional comparison floorspace within the plan period. This is because, as well as increasing spend

on SFT, it is also appropriate to make an allowance for existing businesses to improve their performance (sales efficiency improvements).

8.5. The latter is important as existing retailers generally need to improve their turnover in real terms (ie excluding inflation) to maintain profitability at a time when business costs are increasing in real terms. Further, there is considerable potential for them to do so, as many retailers have seen their sales densities (turnover per sqm of floorspace) fall since the 2008 / 09 recession.

8.6. Experian consider that the improved performance of existing retail floorspace will be a key factor in determining the need for new retail floorspace provision in the future, estimating that, with no change in floorspace, retail businesses could achieve annual improvements in efficiencies of between 0.3% and 0.7% per annum for convenience goods (excluding Covid-19 effects) and between 2.6% and 4.1% per annum for comparison goods (again excluding Covid-19 effects) (ERPBN18, Figures 3a & 3b).

8.7. These figures are not dissimilar to the expected growth rates forecast for convenience and comparison expenditure, with the result that much of the increase in available expenditure would be expected to be used to support the improved performance of existing businesses, rather than requiring the development of new space.

8.8. This is reflected in the comparison capacity assessments for Blaenau Gwent, which is set out in Table A8.29 and which is replicated below.

8.9. There is no equivalent requirement for additional convenience provision as available spend is expected to decrease over the plan period (Table A8.3). The resulting convenience capacity assessment is set out in Table A8.28 and again is replicated below.

Table A8.28: Convenience Capacity - Blaenau Gwent (Base excluding Commitments)

		2018	2020	2025	2030	2033
Total Available Convenience Expenditure in Study Area (£m)	(a)	£136.68	£143.00	£134.01	£131.57	£130.32
Current Market share of Convenience destinations in study area	(b)	89.9%	89.9%	89.9%	89.9%	89.9%
Available Convenience Expenditure for destinations in study area	(c)	£122.93	£128.62	£120.53	£118.34	£117.22
Change in available spend to study area destinations (cumulative from 2018)	(d)		£5.68	-£2.40	-£4.59	-£5.72
Turnover of Convenience destinations (assuming no change in provision or sales efficiences)	(e)	£122.94	£122.94	£122.94	£122.94	£122.94
Turnover of Convenience destinations (allowing for changes in sales efficiences)	(f)	£122.94	£126.99	£122.84	£124.690	£125.816
Residual Convenience spend to support new convenience floorspace (cumulative) (£m)	**(g)**		£1.63	-£2.31	-£6.35	-£8.60
Benchmark Sales density for Convenience Floorspace (£ per sqm)	(h)		£9,812	£9,482	£9,736	£9,736
Amount of new convenience floorspace required (cumulative) (sqm net)	**(j)**		**166**	**-243**	**-652**	**-883**

Table A8.29 : Comparison Capacity - Blaenau Gwent (Base excluding Commitments)

		2018	2020	2025	2030	2035
Total Available Comparison Expenditure in Study Area	(a)	£149.33	£131.90	£155.60	£172.21	£183.88
Current Market share of Comparison destinations in study area	(b)	46.0%	46.0%	46.0%	46.0%	46.0%
Available Comparison Expenditure for destinations in study area	(c)	£68.67	£60.66	£71.56	£79.20	£84.56
Change in available spend to study area destinations (cumulative)	(d)		-£8.02	£2.88	£10.52	£15.89
Turnover of Comparison destinations (assuming no change in provision or sales efficiences)	(e)	£68.68	£68.68	£68.68	£68.68	£68.68
Turnover of Comparison destinations (allowing for changes in sales efficiences)	(f)	£68.68	£61.41	£74.48	£85.42	£93.07
Residual Comparison spend to support new comparison floorspace (cumulative)	**(g)**		**-£0.75**	**-£2.92**	**-£6.23**	**-£8.51**
Benchmark Sales density for Comparison Floorspace (£ per sqm)	(h)		£4,450	£5,410	£6,971	£6,971
Amount of new comparison floorspace required (cumulative) (sqm net)	**(i)**		**-169**	**-540**	**-893**	**-1,221**

8.10. These show that there is no capacity for either additional convenience or comparison floorspace over the plan period, the small amount of convenience need indicated in 2021 being a short-term effect from the strength of convenience sales as a result of the pandemic. Otherwise, incremental improvements in retail expenditure would normally be expected to support existing retail businesses rather than lead to demand for new retail floorspace.

8.11. This represents a significant change from the situation since for most of the last 20 or more years, when anticipated annual increases in comparison spend, in particular were considerably higher. However, it is consistent with what is being seen in the retail sector, with more retail outlets closing than new ones being opened.

8.12. However, this represents the 'base line' situation and as such makes no allowance for possible changes in market share or qualitative need, which are considered in more detail in the main report.

Table A8.1: Population by Zone

Population	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6		Total
2011 Census	12,592	10,748	10,165	4,808	15,019	15,103		68,435
2018 Base	13,176	10,537	10,431	5,171	15,056	15,384		69,755
2020	13,172	10,576	10,401	5,159	15,018	15,362		69,688
2025	13,136	10,477	10,353	5,117	14,903	15,254		69,240
2030	13,050	10,354	10,283	5,054	14,708	15,080		68,529
2033	12,948	10,277	10,207	5,005	14,566	14,943		67,946

Notes

2011 Population from Census

2018 Population estimates and 2020 - 2033 projections from Experian

Table A8.2: Convenience Expenditure per Head 2018 - 2033 (2018 prices)

Convenience Expenditure per Head (£) (2018 prices)	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
2018 Total	£1,998	£2,078	£2,044	£1,957	£2,003	£2,097
2018 exc SFT	£1,922	£1,999	£1,966	£1,883	£1,927	£2,017
2020 exc SFT	£2,013	£2,093	£2,059	£1,972	£2,018	£2,113
2025 exc SFT	£1,899	£1,975	£1,942	£1,860	£1,903	£1,993
2030 exc SFT	£1,883	£1,959	£1,927	£1,845	£1,888	£1,977
2033 exc SFT	£1,881	£1,957	£1,925	£1,843	£1,886	£1,975

Notes

2018 Convenience Expenditure from Experian

2018 Convenience expenditure exc SFT allows for SFT at 3.8% (Experian Retail Planner Briefing Note 18, Figure 5)

2020 - 2033 Projected expenditure based on expected change in spend (Experian Retail Planner Briefing Note 18, Figure 6)

Table A8.3: Total Available Convenience Expenditure 2018 - 2033 excluding SFT (2018 prices)

Convenience Expenditure per Head (£m) (2018 prices)	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total	Change in Expenditure from 2018
2018 Total	£26.33	£21.90	£21.32	£10.12	£30.16	£32.26	£142.08	
2018 exc SFT	£25.33	£21.06	£20.51	£9.74	£29.01	£31.03	£136.68	
2020 exc SFT	£26.51	£22.14	£21.42	£10.17	£30.30	£32.45	£143.00	£6.32
2025 exc SFT	£24.94	£20.69	£20.11	£9.52	£28.36	£30.39	£134.01	-£2.67
2030 exc SFT	£24.58	£20.28	£19.81	£9.32	£27.77	£29.81	£131.57	-£5.11
2033 exc SFT	£24.36	£20.11	£19.65	£9.22	£27.47	£29.51	£130.32	-£6.36

Notes

From Table 1 and 2

Table A8.1: Population by Zone

Population	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6		Total
2011 Census	12,592	10,748	10,165	4,808	15,019	15,103		68,435
2018 Base	13,176	10,537	10,431	5,171	15,056	15,384		69,755
2020	13,172	10,576	10,401	5,159	15,018	15,362		69,688
2025	13,136	10,477	10,353	5,117	14,903	15,254		69,240
2030	13,050	10,354	10,283	5,054	14,708	15,080		68,529
2033	12,948	10,277	10,207	5,005	14,566	14,943		67,946

Notes

2011 Population from Census

2018 Population estimates and 2020 - 2033 projections from Experian

2018 Population estimates and 2020 - 2036 projections from Experian

Table A8.4: Comparison Expenditure per Head 2018 - 2033 (2018 prices)

Comparison Expenditure per Head (£) (2018 prices)	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
2018 Total	£2,493	£2,720	£2,666	£2,436	£2,427	£2,667
2018 exc SFT	£2,074	£2,263	£2,218	£2,027	£2,019	£2,219
2020 exc SFT	£1,834	£2,001	£1,961	£1,792	£1,785	£1,962
2025 exc SFT	£2,177	£2,376	£2,328	£2,128	£2,120	£2,329
2030 exc SFT	£2,435	£2,656	£2,604	£2,379	£2,370	£2,605
2033 exc SFT	£2,622	£2,861	£2,804	£2,562	£2,552	£2,805

Notes

2018 Comparison Expenditure from Experian

2018 Comparison expenditure exc SFT allows for SFT at 16.8% (Experian Retail Planner Briefing Note 18, Figure 5)

2020 - 2033 Projected expenditure based on expected change in spend (Experian Briefing Note 18, Figure 6)

Table A8.5: Total Available Comparison Expenditure 2018 - 2033 excluding SFT (2018 prices)

Comparison Expenditure per Head (£m) (2018 prices)	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total	Change in Expenditure from 2018
2018 Total	£32.85	£28.66	£27.81	£12.60	£36.54	£41.03	£179.48	
2018 exc SFT	£27.33	£23.85	£23.14	£10.48	£30.40	£34.14	£149.33	
2020 exc SFT	£24.15	£21.16	£20.40	£9.24	£26.81	£30.14	£131.90	-£17.43
2025 exc SFT	£28.60	£24.89	£24.11	£10.89	£31.59	£35.53	£155.60	£6.27
2030 exc SFT	£31.77	£27.50	£26.77	£12.02	£34.86	£39.28	£172.21	£22.88
2033 exc SFT	£33.95	£29.40	£28.62	£12.82	£37.18	£41.91	£183.88	£34.55

Notes

From Table 1 and 4

Table A8.6A: Main Food and Grocery Shopping Destination (Q01)

Zone	Main Shop	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Tesco, North West Approach, Ebbw Vale	20.1%	46.0%	29.4%	8.3%	3.2%	3.7%	21.4%
1	Aldi, The Walk, Ebbw Vale	15.5%	23.6%	26.5%	15.1%	10.7%	10.4%	8.0%
1	Iceland, Unit 1, Ebbw Vale Retail Park, Ebbw Vale	2.0%	5.0%	5.1%	1.9%	0.8%	0.0%	0.0%
1	Ebbw Vale Town Centre - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1	Cwm	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	15.4%	12.4%	23.8%	10.7%	1.6%	4.9%	30.0%
2	B&M, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Rassau	0.2%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Nanytyglo, Brynmawr	19.2%	6.5%	9.4%	54.7%	59.2%	14.0%	5.5%
3	Lakeside Retail Park, Nanytyglo, Brynmawr - Other	0.1%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%
3	Brynmawr Town Centre	0.1%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%
3	Nantyglo	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Co-op, 53 High Street, Blaina	0.3%	0.0%	0.0%	0.0%	2.3%	0.4%	0.0%
4	Blaina Town Centre - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Tesco, Castle Street, Abertillery	8.1%	0.0%	0.0%	0.0%	5.6%	34.9%	0.0%
5	Iceland, 31 High Street, Abertillery	1.5%	0.0%	0.0%	0.0%	1.5%	6.6%	0.0%
5	Abertilllery Town Centre - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Llanhilleth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Aberbeeg	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Lidl, Gelli Road, Tredegar	4.7%	0.5%	0.0%	0.0%	0.0%	0.0%	20.9%
6	Tredegar Town Centre - Other	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%
Outside	Asda, Dowlais Top, Merthyr Tydfil	2.3%	1.5%	2.1%	1.7%	0.0%	0.4%	6.0%
Outside	Merthyr Tydfil - Other	1.1%	2.6%	0.0%	0.0%	1.6%	0.8%	1.4%
Outside	Blackwood - Any Store	3.1%	0.5%	0.0%	0.0%	0.0%	13.8%	0.0%
Outside	Risca - Any Store	1.6%	0.0%	0.0%	1.2%	2.9%	5.7%	0.0%
Outside	Abergavenny - Any Store	1.0%	1.0%	0.0%	1.1%	4.7%	1.7%	0.0%
Outside	Cwmbran - Any Store	0.1%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%
Outside	Other	0.4%	0.0%	0.0%	0.0%	0.8%	1.2%	0.5%
	Internet / delivery	2.5%	0.5%	3.8%	4.1%	2.2%	1.5%	3.2%
	(Don't know / varies)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	(Don't do this)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	(Nowhere else)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.6B: Main Food and Grocery Shopping Destination (Q01) exc Null Responses and SFT

Zone	Main Shop	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Tesco, North West Approach, Ebbw Vale	20.6%	46.2%	30.5%	8.6%	3.3%	3.7%	22.1%
1	Aldi, The Walk, Ebbw Vale	15.9%	23.7%	27.5%	15.8%	11.0%	10.5%	8.2%
1	Iceland, Unit 1, Ebbw Vale Retail Park, Ebbw Vale	2.1%	5.0%	5.3%	1.9%	0.8%	0.0%	0.0%
1	Ebbw Vale Town Centre - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1	Cwm	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	15.8%	12.5%	24.7%	11.2%	1.6%	5.0%	31.0%
2	B&M, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Rassau	0.2%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Nanytyglo, Brynmawr	19.7%	6.6%	9.7%	57.1%	60.5%	14.2%	5.7%
3	Lakeside Retail Park, Nanytyglo, Brynmawr - Other	0.1%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%
3	Brynmawr Town Centre	0.1%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%
3	Nantyglo	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Co-op, 53 High Street, Blaina	0.3%	0.0%	0.0%	0.0%	2.3%	0.4%	0.0%
4	Blaina Town Centre - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Tesco, Castle Street, Abertillery	8.3%	0.0%	0.0%	0.0%	5.7%	35.5%	0.0%
5	Iceland, 31 High Street, Abertillery	1.6%	0.0%	0.0%	0.0%	1.5%	6.7%	0.0%
5	Abertilllery Town Centre - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Llanhilleth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Aberbeeg	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Lidl, Gelli Road, Tredegar	4.8%	0.5%	0.0%	0.0%	0.0%	0.0%	21.6%
6	Tredegar Town Centre - Other	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%
Outside	Asda, Dowlais Top, Merthyr Tydfil	2.3%	1.5%	2.2%	1.8%	0.0%	0.4%	6.2%
Outside	Merthyr Tydfil - Other	1.1%	2.6%	0.0%	0.0%	1.6%	0.8%	1.4%
Outside	Blackwood - Any Store	3.2%	0.5%	0.0%	0.0%	0.0%	14.0%	0.0%
Outside	Abergavenny - Any Store	1.7%	0.0%	0.0%	1.2%	3.0%	5.8%	0.0%
Outside	Cwmbran - Any Store	1.1%	1.0%	0.0%	1.2%	4.8%	1.7%	0.0%
Outside	Risca - Any Store	0.1%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%
Outside	Other	0.4%	0.0%	0.0%	0.0%	0.8%	1.2%	0.5%
	Internet / delivery							
	(Don't know / varies)							
	(Don't do this)							
	(Nowhere else)							
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.7A: Other Food and Grocery Shopping Destinations (Q04)

Zone	Main Shop	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Tesco, North West Approach, Ebbw Vale	17.5%	25.5%	29.2%	10.3%	11.3%	4.1%	21.7%
1	Aldi, The Walk, Ebbw Vale	20.5%	29.7%	24.3%	26.2%	9.7%	12.8%	17.5%
1	Iceland, Unit 1, Ebbw Vale Retail Park, Ebbw Vale	6.4%	21.6%	3.7%	3.3%	5.0%	0.0%	5.0%
1	Ebbw Vale Town Centre - Other	5.9%	16.4%	12.5%	2.0%	1.7%	1.4%	1.0%
1	Cwm	0.4%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	20.0%	22.5%	35.0%	19.2%	6.3%	10.0%	21.1%
2	B&M, Rhyd-Y-Blew, Ebbw Vale	4.2%	8.5%	5.9%	4.1%	1.8%	0.9%	3.7%
2	Rassau	0.2%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Nanytyglo, Brynmawr	15.0%	4.0%	15.3%	25.7%	13.4%	30.3%	3.0%
3	Lakeside Retail Park, Nanytyglo, Brynmawr - Other	8.8%	5.3%	6.3%	26.8%	12.4%	8.8%	0.5%
3	Brynmawr Town Centre	2.4%	0.6%	0.6%	12.8%	0.9%	1.0%	0.0%
3	Nantyglo	0.1%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%
4	Co-op, 53 High Street, Blaina	3.5%	1.9%	0.0%	2.8%	34.4%	1.5%	0.0%
4	Blaina Town Centre - Other	0.4%	0.0%	0.0%	0.0%	6.1%	0.0%	0.0%
5	Tesco, Castle Street, Abertillery	7.2%	0.0%	0.0%	6.0%	8.8%	27.1%	0.0%
5	Iceland, 31 High Street, Abertillery	4.5%	0.0%	0.0%	0.7%	6.4%	17.0%	1.6%
5	Abertilllery Town Centre - Other	2.2%	0.0%	0.0%	1.3%	2.6%	8.9%	0.0%
5	Llanhilleth	0.2%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%
5	Aberbeeg	0.5%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%
6	Lidl, Gelli Road, Tredegar	6.7%	1.2%	1.1%	0.0%	0.9%	0.0%	26.7%
6	Tredegar Town Centre - Other	6.1%	0.0%	0.0%	0.0%	0.0%	0.5%	25.6%
Outside	Asda, Dowlais Top, Merthyr Tydfil	4.2%	2.3%	5.6%	0.0%	1.7%	0.9%	11.2%
Outside	Merthyr Tydfil - Other	3.1%	3.5%	3.6%	3.4%	4.6%	0.5%	4.0%
Outside	Blackwood - Any Store	1.3%	1.9%	0.0%	0.0%	4.2%	3.4%	0.0%
Outside	Risca - Any Store	2.6%	0.6%	3.2%	10.5%	3.7%	0.9%	0.0%
Outside	Abergavenny - Any Store	1.9%	0.0%	0.0%	2.6%	3.4%	6.0%	0.0%
Outside	Cwmbran - Any Store	1.6%	3.1%	0.0%	1.3%	2.6%	3.4%	0.0%
	Other	1.7%	2.3%	1.1%	2.0%	4.6%	2.5%	0.0%
	Internet / delivery	2.1%	1.2%	3.0%	2.6%	3.5%	2.1%	1.6%
	(Don't know / varies)	0.5%	0.0%	1.9%	0.7%	0.0%	0.0%	0.5%
	(Don't do this)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	(Nowhere else)	0.9%	0.0%	0.0%	1.4%	3.7%	0.9%	0.9%
	Total	152.7%	154.6%	153.6%	166.5%	153.5%	148.2%	145.7%
		152.74	154.64	153.56	166.51	153.46	148.24	145.73

Table A8.7B: Other Food and Grocery Shopping Destinations (Q04) - allowing for multiple responses and excluding null reponses

Zone	Main Shop	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Tesco, North West Approach, Ebbw Vale	11.5%	16.5%	19.2%	6.2%	7.6%	2.8%	15.0%
1	Aldi, The Walk, Ebbw Vale	13.6%	19.2%	16.0%	16.0%	6.5%	8.7%	12.2%
1	Iceland, Unit 1, Ebbw Vale Retail Park, Ebbw Vale	4.2%	14.0%	2.4%	2.0%	3.3%	0.0%	3.4%
1	Ebbw Vale Town Centre - Other	3.9%	10.6%	8.2%	1.2%	1.1%	1.0%	0.7%
1	Cwm	0.3%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	13.2%	14.6%	23.1%	11.7%	4.2%	6.8%	14.6%
2	B&M, Rhyd-Y-Blew, Ebbw Vale	2.8%	5.5%	3.9%	2.5%	1.2%	0.6%	2.5%
2	Rassau	0.1%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Nanytyglo, Brynmawr	9.9%	2.6%	10.1%	15.6%	9.0%	20.6%	2.1%
3	Lakeside Retail Park, Nanytyglo, Brynmawr - Other	5.8%	3.4%	4.2%	16.3%	8.3%	5.9%	0.4%
3	Brynmawr Town Centre	1.6%	0.4%	0.4%	7.8%	0.6%	0.7%	0.0%
3	Nantyglo	0.1%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%
4	Co-op, 53 High Street, Blaina	2.3%	1.2%	0.0%	1.7%	23.0%	1.0%	0.0%
4	Blaina Town Centre - Other	0.3%	0.0%	0.0%	0.0%	4.1%	0.0%	0.0%
5	Tesco, Castle Street, Abertillery	4.7%	0.0%	0.0%	3.7%	5.8%	18.4%	0.0%
5	Iceland, 31 High Street, Abertillery	3.0%	0.0%	0.0%	0.4%	4.3%	11.6%	1.1%
5	Abertilllery Town Centre - Other	1.5%	0.0%	0.0%	0.8%	1.7%	6.0%	0.0%
5	Llanhilleth	0.1%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%
5	Aberbeeg	0.3%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%
6	Lidl, Gelli Road, Tredegar	4.4%	0.8%	0.8%	0.0%	0.6%	0.0%	18.5%
6	Tredegar Town Centre - Other	4.0%	0.0%	0.0%	0.0%	0.0%	0.3%	17.7%
Outside	Asda, Dowlais Top, Merthyr Tydfil	2.8%	1.5%	3.7%	0.0%	1.1%	0.6%	7.8%
Outside	Merthyr Tydfil - Other	2.0%	2.3%	2.4%	2.1%	3.0%	0.3%	2.8%
Outside	Blackwood - Any Store	0.9%	1.2%	0.0%	0.0%	2.8%	2.3%	0.0%
Outside	Risca - Any Store	1.7%	0.4%	2.1%	6.4%	2.4%	0.6%	0.0%
Outside	Abergavenny - Any Store	1.2%	0.0%	0.0%	1.6%	2.2%	4.1%	0.0%
Outside	Cwmbran - Any Store	1.1%	2.0%	0.0%	0.8%	1.7%	2.3%	0.0%
	Other	1.1%	1.5%	0.8%	1.2%	3.0%	1.7%	0.0%
	Internet / delivery	1.4%	0.8%	2.0%	1.6%	2.3%	1.4%	1.1%
	(Don't know / varies)							
	(Don't do this)							
	(Nowhere else)							
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.7C: Other Food and Grocery Shopping Destinations (Q04) - exc SFT and null responses

Zone	Main Shop	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Tesco, North West Approach, Ebbw Vale	11.7%	16.6%	19.6%	6.3%	7.7%	2.8%	15.2%
1	Aldi, The Walk, Ebbw Vale	13.8%	19.4%	16.4%	16.2%	6.6%	8.8%	12.3%
1	Iceland, Unit 1, Ebbw Vale Retail Park, Ebbw Vale	4.3%	14.1%	2.5%	2.0%	3.4%	0.0%	3.5%
1	Ebbw Vale Town Centre - Other	3.9%	10.7%	8.4%	1.3%	1.2%	1.0%	0.7%
1	Cwm	0.3%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	13.4%	14.7%	23.5%	11.8%	4.3%	6.9%	14.8%
2	B&M, Rhyd-Y-Blew, Ebbw Vale	2.8%	5.5%	4.0%	2.6%	1.2%	0.6%	2.6%
2	Rassau	0.1%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Nanytyglo, Brynmawr	10.0%	2.6%	10.3%	15.9%	9.2%	20.9%	2.1%
3	Lakeside Retail Park, Nanytyglo, Brynmawr - Other	5.9%	3.5%	4.3%	16.5%	8.5%	6.0%	0.4%
3	Brynmawr Town Centre	1.6%	0.4%	0.4%	7.9%	0.6%	0.7%	0.0%
3	Nantyglo	0.1%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%
4	Co-op, 53 High Street, Blaina	2.3%	1.2%	0.0%	1.8%	23.5%	1.0%	0.0%
4	Blaina Town Centre - Other	0.3%	0.0%	0.0%	0.0%	4.2%	0.0%	0.0%
5	Tesco, Castle Street, Abertillery	4.8%	0.0%	0.0%	3.7%	6.0%	18.7%	0.0%
5	Iceland, 31 High Street, Abertillery	3.0%	0.0%	0.0%	0.4%	4.4%	11.7%	1.1%
5	Abertilllery Town Centre - Other	1.5%	0.0%	0.0%	0.8%	1.7%	6.1%	0.0%
5	Llanhilleth	0.1%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%
5	Aberbeeg	0.3%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%
6	Lidl, Gelli Road, Tredegar	4.5%	0.8%	0.8%	0.0%	0.6%	0.0%	18.7%
6	Tredegar Town Centre - Other	4.1%	0.0%	0.0%	0.0%	0.0%	0.4%	17.9%
Outside	Asda, Dowlais Top, Merthyr Tydfil	2.8%	1.5%	3.8%	0.0%	1.2%	0.6%	7.9%
Outside	Merthyr Tydfil - Other	2.1%	2.3%	2.4%	2.1%	3.1%	0.4%	2.8%
Outside	Blackwood - Any Store	0.9%	1.2%	0.0%	0.0%	2.9%	2.4%	0.0%
Outside	Risca - Any Store	1.8%	0.4%	2.1%	6.5%	2.5%	0.6%	0.0%
Outside	Abergavenny - Any Store	1.3%	0.0%	0.0%	1.6%	2.3%	4.1%	0.0%
Outside	Cwmbran - Any Store	1.1%	2.0%	0.0%	0.8%	1.7%	2.4%	0.0%
	Other	1.2%	1.5%	0.8%	1.2%	3.1%	1.7%	0.0%
	Internet / delivery							
	(Don't know / varies)							
	(Don't do this)							
	(Nowhere else)							
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.8: Convenience Market Shares

Zone	Main Shop	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Tesco, North West Approach, Ebbw Vale	18.4%	38.8%	27.8%	8.1%	4.4%	3.5%	20.4%
1	Aldi, The Walk, Ebbw Vale	15.4%	22.6%	24.8%	15.9%	9.9%	10.1%	9.2%
1	Iceland, Unit 1, Ebbw Vale Retail Park, Ebbw Vale	2.6%	7.3%	4.6%	2.0%	1.5%	0.0%	0.9%
1	Ebbw Vale Town Centre - Other	1.0%	2.7%	2.1%	0.3%	0.3%	0.2%	0.2%
1	Cwm	0.1%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	15.2%	13.0%	24.4%	11.4%	2.3%	5.5%	26.9%
2	B&M, Rhyd-Y-Blew, Ebbw Vale	0.7%	1.4%	1.0%	0.6%	0.3%	0.2%	0.6%
2	Rassau	0.2%	0.0%	0.2%	0.9%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Nanytyglo, Brynmawr	17.3%	5.6%	9.9%	46.8%	47.7%	15.9%	4.8%
3	Lakeside Retail Park, Nanytyglo, Brynmawr - Other	1.5%	0.9%	1.1%	4.1%	2.7%	1.5%	0.1%
3	Brynmawr Town Centre	0.5%	0.1%	0.1%	2.0%	1.3%	0.2%	0.0%
3	Nantyglo	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%
4	Co-op, 53 High Street, Blaina	0.8%	0.3%	0.0%	0.4%	7.6%	0.6%	0.0%
4	Blaina Town Centre - Other	0.1%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%
5	Tesco, Castle Street, Abertillery	7.4%	0.0%	0.0%	0.9%	5.8%	31.3%	0.0%
5	Iceland, 31 High Street, Abertillery	1.9%	0.0%	0.0%	0.1%	2.2%	7.9%	0.3%
5	Abertilllery Town Centre - Other	0.4%	0.0%	0.0%	0.2%	0.4%	1.5%	0.0%
5	Llanhilleth	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%
5	Aberbeeg	0.1%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
6	Lidl, Gelli Road, Tredegar	4.8%	0.6%	0.2%	0.0%	0.2%	0.0%	20.9%
6	Tredegar Town Centre - Other	1.6%	0.0%	0.0%	0.0%	0.0%	0.1%	6.9%
Outside	Asda, Dowlais Top, Merthyr Tydfil	2.5%	1.5%	2.6%	1.4%	0.3%	0.5%	6.6%
Outside	Merthyr Tydfil - Other	1.3%	2.5%	0.6%	0.5%	2.0%	0.7%	1.8%
Outside	Blackwood - Any Store	2.6%	0.7%	0.0%	0.0%	0.7%	11.1%	0.0%
Outside	Risca - Any Store	1.7%	0.1%	0.5%	2.5%	2.9%	4.5%	0.0%
Outside	Abergavenny - Any Store	1.1%	0.7%	0.0%	1.3%	4.1%	2.3%	0.0%
Outside	Cwmbran - Any Store	0.3%	0.5%	0.0%	0.2%	1.0%	0.6%	0.0%
Outside	Other	0.6%	0.4%	0.2%	0.3%	1.4%	1.3%	0.4%
	Internet / delivery							
	(Don't know / varies)							
	(Don't do this)							
	(Nowhere else)							
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Based on 75% spend at Main Food & Grocery destination and 25% at 'Other' outlets

Table A8.9A: Use of Main Shop (Q02)

% Spend at Main Food & Grocery Shop (Q02)	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
None	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1 - 10%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%
11 - 20%	1.0%	0.9%	0.0%	0.0%	4.8%	0.0%	2.4%
21 - 30%	1.2%	2.4%	1.1%	1.2%	1.4%	0.4%	0.9%
31 - 40%	2.2%	1.6%	4.9%	2.3%	3.2%	2.9%	0.0%
41 - 50%	14.6%	19.3%	10.2%	8.8%	9.4%	15.5%	18.5%
51 - 60%	9.6%	3.0%	14.7%	11.5%	3.2%	8.6%	13.2%
61 - 70%	10.3%	8.8%	13.2%	8.9%	3.8%	12.2%	10.5%
71 - 80%	24.1%	18.3%	25.5%	25.9%	33.8%	26.9%	20.8%
81 - 90%	15.6%	17.3%	14.0%	20.9%	20.8%	9.8%	15.8%
91 - 99%	5.6%	7.2%	5.4%	7.1%	6.8%	6.2%	2.4%
100%	13.2%	16.6%	11.0%	12.7%	13.0%	17.6%	8.1%
(Don't know / varies)	2.1%	4.5%	0.0%	0.6%	0.0%	0.0%	5.1%

Table A8.9B: Use of Main Shop (Q02)- Cumulative

% Spend at Main Food & Grocery Shop (Q02)	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
None	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1 - 10%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%
11 - 20%	1.5%	0.9%	0.0%	0.0%	4.8%	0.0%	4.6%
21 - 30%	2.7%	3.3%	1.1%	1.2%	6.2%	0.4%	5.5%
31 - 40%	5.0%	4.9%	6.0%	3.5%	9.4%	3.3%	5.5%
41 - 50%	19.6%	24.3%	16.2%	12.3%	18.8%	18.8%	24.1%
51 - 60%	29.2%	27.3%	30.9%	23.8%	21.9%	27.4%	37.2%
61 - 70%	39.5%	36.1%	44.1%	32.7%	25.8%	39.6%	47.8%
71 - 80%	63.6%	54.4%	69.6%	58.6%	59.5%	66.4%	68.6%
81 - 90%	79.1%	71.7%	83.6%	79.6%	80.3%	76.2%	84.4%
91 - 99%	84.7%	78.9%	89.0%	86.6%	87.0%	82.4%	86.8%
100%	97.9%	95.5%	100.0%	99.4%	100.0%	100.0%	94.9%
(Don't know / varies)	2.1%	4.5%	0.0%	0.6%	0.0%	0.0%	5.1%

Table A8.9C: Use of Main Shop (Q02)- Cumulative excluding null responses

% Spend at Main Food & Grocery Shop (Q02)	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
None	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1 - 10%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%
11 - 20%	1.6%	1.0%	0.0%	0.0%	4.8%	0.0%	4.9%
21 - 30%	2.8%	3.5%	1.1%	1.2%	6.2%	0.4%	5.8%
31 - 40%	5.1%	5.2%	6.0%	3.5%	9.4%	3.3%	5.8%
41 - 50%	20.0%	25.4%	16.2%	12.4%	18.8%	18.8%	25.4%
51 - 60%	29.8%	28.6%	30.9%	23.9%	21.9%	27.4%	39.2%
61 - 70%	40.3%	37.8%	44.1%	32.9%	25.8%	39.6%	50.3%
71 - 80%	64.9%	57.0%	69.6%	59.0%	59.5%	66.4%	72.3%
81 - 90%	80.8%	75.1%	83.6%	80.1%	80.3%	76.2%	89.0%
91 - 99%	86.5%	82.7%	89.0%	87.2%	87.0%	82.4%	91.5%
100%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.10A: Convenience Turnover 2018

Zone	Convenience Turnover	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar	Total from Study Area	Estimated % Inflow from outside Study Area	Total Convenience Turnover (£m)
	Available Convenience Spend 2018 (£m)	£25.33	£21.06	£20.51	£9.74	£29.01	£31.03	£136.68		
1	Tesco, North West Approach, Ebbw Vale	£9.83	£5.86	£1.65	£0.43	£1.01	£6.33	£25.11	5.0%	£26.43
1	Aldi, The Walk, Ebbw Vale	£5.73	£5.21	£3.26	£0.96	£2.93	£2.86	£20.96	2.0%	£21.39
1	Iceland, Unit 1, Ebbw Vale Retail Park, Ebbw Vale	£1.84	£0.96	£0.40	£0.14	£0.00	£0.27	£3.62	2.0%	£3.69
1	Ebbw Vale Town Centre - Other	£0.68	£0.44	£0.06	£0.03	£0.07	£0.06	£1.34	2.0%	£1.37
1	Cwm	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	0.0%	£0.10
2	Morrisons, Beaufort Road, Ebbw Vale	£3.30	£5.15	£2.33	£0.22	£1.58	£8.36	£20.94	5.0%	£22.05
2	B&M, Rhyd-Y-Blew, Ebbw Vale	£0.35	£0.21	£0.13	£0.03	£0.05	£0.20	£0.97	5.0%	£1.02
2	Rassau	£0.00	£0.04	£0.19	£0.00	£0.00	£0.00	£0.23	0.0%	£0.23
3	Asda, Lakeside Retail Park, Nanytyglo, Brynmawr	£1.41	£2.08	£9.59	£4.64	£4.60	£1.49	£23.83	5.0%	£25.08
3	Lakeside Retail Park, Nanytyglo, Brynmawr - Other	£0.22	£0.22	£0.85	£0.26	£0.44	£0.03	£2.02	5.0%	£2.13
3	Brynmawr Town Centre	£0.03	£0.02	£0.41	£0.13	£0.05	£0.00	£0.63	0.0%	£0.63
3	Nantyglo	£0.00	£0.00	£0.02	£0.00	£0.00	£0.00	£0.02	0.0%	£0.02
4	Co-op, 53 High Street, Blaina	£0.08	£0.00	£0.09	£0.74	£0.17	£0.00	£1.08	0.0%	£1.08
4	Blaina Town Centre - Other	£0.00	£0.00	£0.00	£0.10	£0.00	£0.00	£0.10	0.0%	£0.10
5	Tesco, Castle Street, Abertillery	£0.00	£0.00	£0.19	£0.56	£9.07	£0.00	£9.82	5.0%	£10.34
5	Iceland, 31 High Street, Abertillery	£0.00	£0.00	£0.02	£0.22	£2.30	£0.09	£2.63	0.0%	£2.63
5	Abertilllery Town Centre - Other	£0.00	£0.00	£0.04	£0.04	£0.44	£0.00	£0.53	0.0%	£0.53
5	Llanhilleth	£0.00	£0.00	£0.00	£0.00	£0.05	£0.00	£0.05	5.0%	£0.05
5	Aberbeeg	£0.00	£0.00	£0.00	£0.00	£0.12	£0.00	£0.12	5.0%	£0.12
6	Lidl, Gelli Road, Tredegar	£0.15	£0.04	£0.00	£0.02	£0.00	£6.49	£6.69	5.0%	£7.04
6	Tredegar Town Centre - Other	£0.00	£0.00	£0.00	£0.00	£0.03	£2.15	£2.17	0.0%	£2.17
	Total within Study Area	£23.71	£20.24	£19.24	£8.52	£22.91	£28.32	£122.94		£128.18
Outside	Asda, Dowlais Top, Merthyr Tydfil	£0.37	£0.54	£0.28	£0.03	£0.14	£2.06	£3.42		
Outside	Merthyr Tydfil - Other	£0.63	£0.13	£0.11	£0.19	£0.20	£0.54	£1.81		
Outside	Blackwood - Any Store	£0.18	£0.00	£0.00	£0.07	£3.22	£0.00	£3.47		
Outside	Risca - Any Store	£0.03	£0.11	£0.52	£0.28	£1.30	£0.00	£2.24		
Outside	Abergavenny - Any Store	£0.19	£0.00	£0.26	£0.40	£0.67	£0.00	£1.53		
Outside	Cwmbran - Any Store	£0.13	£0.00	£0.04	£0.10	£0.17	£0.00	£0.44		
Outside	Other	£0.09	£0.04	£0.06	£0.13	£0.39	£0.12	£0.84		
	Total	£25.33	£21.06	£20.51	£9.74	£29.01	£31.04	£136.69		

Table A8.10B: Convenience Turnover 2020

Zone	Convenience Turnover	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar	Total from Study Area	Estimated % Inflow from outside Study Area	Total Convenience Turnover (£m)
	Available Convenience Spend 2020 (£m)	£26.51	£22.14	£21.42	£10.17	£30.30	£32.45	£143.00		
1	Tesco, North West Approach, Ebbw Vale	£10.29	£6.16	£1.73	£0.45	£1.06	£6.62	£26.29	5.0%	£27.68
1	Aldi, The Walk, Ebbw Vale	£6.00	£5.48	£3.40	£1.01	£3.06	£3.00	£21.94	2.0%	£22.39
1	Iceland, Unit 1, Ebbw Vale Retail Park, Ebbw Vale	£1.93	£1.01	£0.42	£0.15	£0.00	£0.28	£3.79	2.0%	£3.87
1	Ebbw Vale Town Centre - Other	£0.71	£0.46	£0.07	£0.03	£0.08	£0.06	£1.40	2.0%	£1.43
1	Cwm	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	0.0%	£0.10
2	Morrisons, Beaufort Road, Ebbw Vale	£3.45	£5.41	£2.43	£0.23	£1.65	£8.74	£21.93	5.0%	£23.08
2	B&M, Rhyd-Y-Blew, Ebbw Vale	£0.37	£0.22	£0.14	£0.03	£0.05	£0.21	£1.01	5.0%	£1.06
2	Rassau	£0.00	£0.04	£0.19	£0.00	£0.00	£0.00	£0.24	0.0%	£0.24
3	Asda, Lakeside Retail Park, Nanytyglo, Brynmawr	£1.48	£2.19	£10.02	£4.85	£4.81	£1.56	£24.91	5.0%	£26.22
3	Lakeside Retail Park, Nanytyglo, Brynmawr - Other	£0.23	£0.24	£0.89	£0.28	£0.46	£0.03	£2.11	5.0%	£2.23
3	Brynmawr Town Centre	£0.03	£0.02	£0.42	£0.13	£0.05	£0.00	£0.65	0.0%	£0.65
3	Nantyglo	£0.00	£0.00	£0.02	£0.00	£0.00	£0.00	£0.02	0.0%	£0.02
4	Co-op, 53 High Street, Blaina	£0.08	£0.00	£0.09	£0.77	£0.17	£0.00	£1.12	0.0%	£1.12
4	Blaina Town Centre - Other	£0.00	£0.00	£0.00	£0.11	£0.00	£0.00	£0.11	0.0%	£0.11
5	Tesco, Castle Street, Abertillery	£0.00	£0.00	£0.20	£0.59	£9.48	£0.00	£10.26	5.0%	£10.80
5	Iceland, 31 High Street, Abertillery	£0.00	£0.00	£0.02	£0.23	£2.40	£0.09	£2.74	0.0%	£2.74
5	Abertilllery Town Centre - Other	£0.00	£0.00	£0.04	£0.04	£0.46	£0.00	£0.55	0.0%	£0.55
5	Llanhilleth	£0.00	£0.00	£0.00	£0.00	£0.05	£0.00	£0.05	5.0%	£0.05
5	Aberbeeg	£0.00	£0.00	£0.00	£0.00	£0.12	£0.00	£0.12	5.0%	£0.13
6	Lidl, Gelli Road, Tredegar	£0.16	£0.04	£0.00	£0.02	£0.00	£6.78	£7.00	5.0%	£7.37
6	Tredegar Town Centre - Other	£0.00	£0.00	£0.00	£0.00	£0.03	£2.24	£2.27	0.0%	£2.27
	Total within Study Area	£24.82	£21.28	£20.09	£8.91	£23.93	£29.61	£128.63		£134.12
Outside	Asda, Dowlais Top, Merthyr Tydfil	£0.39	£0.57	£0.29	£0.03	£0.15	£2.16	£3.58		
Outside	Merthyr Tydfil - Other	£0.66	£0.13	£0.11	£0.20	£0.21	£0.57	£1.89		
Outside	Blackwood - Any Store	£0.19	£0.00	£0.00	£0.07	£3.37	£0.00	£3.63		
Outside	Risca - Any Store	£0.03	£0.12	£0.54	£0.29	£1.36	£0.00	£2.34		
Outside	Abergavenny - Any Store	£0.19	£0.00	£0.27	£0.42	£0.70	£0.00	£1.59		
Outside	Cwmbran - Any Store	£0.14	£0.00	£0.04	£0.11	£0.18	£0.00	£0.46		
Outside	Other	£0.10	£0.04	£0.07	£0.14	£0.41	£0.12	£0.88		
	Total	£26.51	£22.14	£21.42	£10.17	£30.31	£32.46	£143.00		

Table A8.10C: Convenience Turnover 2025

Zone	Convenience Turnover	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar	Total from Study Area	Estimated % Inflow from outside Study Area	Total Convenience Turnover (£m)
	Available Convenience Spend 2025 (£m)	£24.94	£20.69	£20.11	£9.52	£28.36	£30.39	£134.01		
1	Tesco, North West Approach, Ebbw Vale	£9.68	£5.75	£1.62	£0.42	£0.99	£6.20	£24.66	5.0%	£25.95
1	Aldi, The Walk, Ebbw Vale	£5.64	£5.12	£3.19	£0.94	£2.87	£2.81	£20.57	2.0%	£20.99
1	Iceland, Unit 1, Ebbw Vale Retail Park, Ebbw Vale	£1.81	£0.94	£0.40	£0.14	£0.00	£0.26	£3.55	2.0%	£3.63
1	Ebbw Vale Town Centre - Other	£0.67	£0.43	£0.06	£0.03	£0.07	£0.06	£1.32	2.0%	£1.34
1	Cwm	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	0.0%	£0.10
2	Morrisons, Beaufort Road, Ebbw Vale	£3.25	£5.06	£2.28	£0.22	£1.55	£8.19	£20.54	5.0%	£21.62
2	B&M, Rhyd-Y-Blew, Ebbw Vale	£0.34	£0.21	£0.13	£0.03	£0.05	£0.20	£0.95	5.0%	£1.00
2	Rassau	£0.00	£0.04	£0.18	£0.00	£0.00	£0.00	£0.22	0.0%	£0.22
3	Asda, Lakeside Retail Park, Nanytyglo, Brynmawr	£1.39	£2.04	£9.41	£4.54	£4.50	£1.46	£23.34	5.0%	£24.57
3	Lakeside Retail Park, Nanytyglo, Brynmawr - Other	£0.22	£0.22	£0.83	£0.26	£0.43	£0.03	£1.98	5.0%	£2.09
3	Brynmawr Town Centre	£0.03	£0.02	£0.40	£0.12	£0.05	£0.00	£0.61	0.0%	£0.61
3	Nantyglo	£0.00	£0.00	£0.02	£0.00	£0.00	£0.00	£0.02	0.0%	£0.02
4	Co-op, 53 High Street, Blaina	£0.08	£0.00	£0.09	£0.72	£0.16	£0.00	£1.05	0.0%	£1.05
4	Blaina Town Centre - Other	£0.00	£0.00	£0.00	£0.10	£0.00	£0.00	£0.10	0.0%	£0.10
5	Tesco, Castle Street, Abertillery	£0.00	£0.00	£0.19	£0.55	£8.87	£0.00	£9.60	5.0%	£10.11
5	Iceland, 31 High Street, Abertillery	£0.00	£0.00	£0.02	£0.21	£2.25	£0.08	£2.57	0.0%	£2.57
5	Abertilllery Town Centre - Other	£0.00	£0.00	£0.04	£0.04	£0.43	£0.00	£0.52	0.0%	£0.52
5	Llanhilleth	£0.00	£0.00	£0.00	£0.00	£0.05	£0.00	£0.05	5.0%	£0.05
5	Aberbeeg	£0.00	£0.00	£0.00	£0.00	£0.12	£0.00	£0.12	5.0%	£0.12
6	Lidl, Gelli Road, Tredegar	£0.15	£0.04	£0.00	£0.01	£0.00	£6.35	£6.55	5.0%	£6.90
6	Tredegar Town Centre - Other	£0.00	£0.00	£0.00	£0.00	£0.02	£2.10	£2.13	0.0%	£2.13
	Total within Study Area	£23.35	£19.88	£18.86	£8.33	£22.40	£27.73	£120.55		£125.69
Outside	Asda, Dowlais Top, Merthyr Tydfil	£0.37	£0.53	£0.27	£0.03	£0.14	£2.02	£3.36		
Outside	Merthyr Tydfil - Other	£0.62	£0.13	£0.11	£0.19	£0.20	£0.53	£1.77		
Outside	Blackwood - Any Store	£0.17	£0.00	£0.00	£0.07	£3.15	£0.00	£3.40		
Outside	Risca - Any Store	£0.03	£0.11	£0.51	£0.27	£1.27	£0.00	£2.19		
Outside	Abergavenny - Any Store	£0.18	£0.00	£0.26	£0.39	£0.66	£0.00	£1.49		
Outside	Cwmbran - Any Store	£0.13	£0.00	£0.04	£0.10	£0.17	£0.00	£0.43		
Outside	Other	£0.09	£0.04	£0.06	£0.13	£0.38	£0.11	£0.82		
	Total	£24.94	£20.69	£20.11	£9.52	£28.37	£30.40	£134.01		

Table A8.10D: Convenience Turnover 2030

Zone	Convenience Turnover	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar	Total from Study Area	Estimated % Inflow from outside Study Area	Total Convenience Turnover (£m)
	Available Convenience Spend 2030 (£m)	£24.58	£20.28	£19.81	£9.32	£27.77	£29.81	£131.57		
1	Tesco, North West Approach, Ebbw Vale	£9.54	£5.64	£1.60	£0.41	£0.97	£6.08	£24.23	5.0%	£25.51
1	Aldi, The Walk, Ebbw Vale	£5.56	£5.02	£3.14	£0.92	£2.81	£2.75	£20.21	2.0%	£20.62
1	Iceland, Unit 1, Ebbw Vale Retail Park, Ebbw Vale	£1.79	£0.93	£0.39	£0.14	£0.00	£0.26	£3.50	2.0%	£3.57
1	Ebbw Vale Town Centre - Other	£0.66	£0.43	£0.06	£0.03	£0.07	£0.05	£1.29	2.0%	£1.32
1	Cwm	£0.09	£0.00	£0.00	£0.00	£0.00	£0.00	£0.09	0.0%	£0.09
2	Morrisons, Beaufort Road, Ebbw Vale	£3.20	£4.96	£2.25	£0.21	£1.52	£8.03	£20.17	5.0%	£21.23
2	B&M, Rhyd-Y-Blew, Ebbw Vale	£0.34	£0.20	£0.13	£0.03	£0.04	£0.19	£0.93	5.0%	£0.98
2	Rassau	£0.00	£0.04	£0.18	£0.00	£0.00	£0.00	£0.22	0.0%	£0.22
3	Asda, Lakeside Retail Park, Nanytyglo, Brynmawr	£1.37	£2.00	£9.27	£4.45	£4.41	£1.43	£22.93	5.0%	£24.14
3	Lakeside Retail Park, Nanytyglo, Brynmawr - Other	£0.21	£0.22	£0.82	£0.25	£0.42	£0.03	£1.95	5.0%	£2.05
3	Brynmawr Town Centre	£0.02	£0.02	£0.39	£0.12	£0.05	£0.00	£0.60	0.0%	£0.60
3	Nantyglo	£0.00	£0.00	£0.02	£0.00	£0.00	£0.00	£0.02	0.0%	£0.02
4	Co-op, 53 High Street, Blaina	£0.08	£0.00	£0.09	£0.71	£0.16	£0.00	£1.03	0.0%	£1.03
4	Blaina Town Centre - Other	£0.00	£0.00	£0.00	£0.10	£0.00	£0.00	£0.10	0.0%	£0.10
5	Tesco, Castle Street, Abertillery	£0.00	£0.00	£0.18	£0.54	£8.68	£0.00	£9.40	5.0%	£9.90
5	Iceland, 31 High Street, Abertillery	£0.00	£0.00	£0.02	£0.21	£2.20	£0.08	£2.51	0.0%	£2.51
5	Abertilllery Town Centre - Other	£0.00	£0.00	£0.04	£0.04	£0.43	£0.00	£0.51	0.0%	£0.51
5	Llanhilleth	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.04	5.0%	£0.05
5	Aberbeeg	£0.00	£0.00	£0.00	£0.00	£0.11	£0.00	£0.11	5.0%	£0.12
6	Lidl, Gelli Road, Tredegar	£0.15	£0.04	£0.00	£0.01	£0.00	£6.23	£6.43	5.0%	£6.77
6	Tredegar Town Centre - Other	£0.00	£0.00	£0.00	£0.00	£0.02	£2.06	£2.09	0.0%	£2.09
	Total within Study Area	£23.01	£19.49	£18.58	£8.16	£21.93	£27.20	£118.37		£123.42
Outside	Asda, Dowlais Top, Merthyr Tydfil	£0.36	£0.52	£0.27	£0.03	£0.13	£1.98	£3.29		
Outside	Merthyr Tydfil - Other	£0.61	£0.12	£0.11	£0.19	£0.19	£0.52	£1.74		
Outside	Blackwood - Any Store	£0.17	£0.00	£0.00	£0.07	£3.09	£0.00	£3.33		
Outside	Risca - Any Store	£0.02	£0.11	£0.50	£0.27	£1.25	£0.00	£2.15		
Outside	Abergavenny - Any Store	£0.18	£0.00	£0.25	£0.39	£0.64	£0.00	£1.46		
Outside	Cwmbran - Any Store	£0.13	£0.00	£0.04	£0.10	£0.16	£0.00	£0.43		
Outside	Other	£0.09	£0.04	£0.06	£0.13	£0.37	£0.11	£0.81		
	Total	£24.58	£20.28	£19.81	£9.32	£27.77	£29.81	£131.58		

Table A8.10E: Convenience Turnover 2033

Zone	Convenience Turnover	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar	Total from Study Area	Estimated % Inflow from outside Study Area	Total Convenience Turnover (£m)
	Available Convenience Spend 2033 (£m)	£24.36	£20.11	£19.65	£9.22	£27.47	£29.51	£130.32		
1	Tesco, North West Approach, Ebbw Vale	£9.46	£5.59	£1.58	£0.40	£0.96	£6.02	£24.01	5.0%	£25.27
1	Aldi, The Walk, Ebbw Vale	£5.51	£4.98	£3.12	£0.91	£2.78	£2.72	£20.02	2.0%	£20.43
1	Iceland, Unit 1, Ebbw Vale Retail Park, Ebbw Vale	£1.77	£0.92	£0.39	£0.13	£0.00	£0.26	£3.47	2.0%	£3.54
1	Ebbw Vale Town Centre - Other	£0.65	£0.42	£0.06	£0.03	£0.07	£0.05	£1.28	2.0%	£1.31
1	Cwm	£0.09	£0.00	£0.00	£0.00	£0.00	£0.00	£0.09	0.0%	£0.09
2	Morrisons, Beaufort Road, Ebbw Vale	£3.17	£4.91	£2.23	£0.21	£1.50	£7.95	£19.98	5.0%	£21.03
2	B&M, Rhyd-Y-Blew, Ebbw Vale	£0.34	£0.20	£0.13	£0.03	£0.04	£0.19	£0.92	5.0%	£0.97
2	Rassau	£0.00	£0.04	£0.18	£0.00	£0.00	£0.00	£0.22	0.0%	£0.22
3	Asda, Lakeside Retail Park, Nanytyglo, Brynmawr	£1.36	£1.99	£9.19	£4.40	£4.36	£1.42	£22.72	5.0%	£23.91
3	Lakeside Retail Park, Nanytyglo, Brynmawr - Other	£0.21	£0.21	£0.81	£0.25	£0.41	£0.03	£1.93	5.0%	£2.03
3	Brynmawr Town Centre	£0.02	£0.02	£0.39	£0.12	£0.05	£0.00	£0.60	0.0%	£0.60
3	Nantyglo	£0.00	£0.00	£0.02	£0.00	£0.00	£0.00	£0.02	0.0%	£0.02
4	Co-op, 53 High Street, Blaina	£0.07	£0.00	£0.09	£0.70	£0.16	£0.00	£1.02	0.0%	£1.02
4	Blaina Town Centre - Other	£0.00	£0.00	£0.00	£0.10	£0.00	£0.00	£0.10	0.0%	£0.10
5	Tesco, Castle Street, Abertillery	£0.00	£0.00	£0.18	£0.53	£8.59	£0.00	£9.30	5.0%	£9.79
5	Iceland, 31 High Street, Abertillery	£0.00	£0.00	£0.02	£0.21	£2.18	£0.08	£2.49	0.0%	£2.49
5	Abertilllery Town Centre - Other	£0.00	£0.00	£0.04	£0.04	£0.42	£0.00	£0.50	0.0%	£0.50
5	Llanhilleth	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.04	5.0%	£0.05
5	Aberbeeg	£0.00	£0.00	£0.00	£0.00	£0.11	£0.00	£0.11	5.0%	£0.12
6	Lidl, Gelli Road, Tredegar	£0.14	£0.04	£0.00	£0.01	£0.00	£6.17	£6.36	5.0%	£6.70
6	Tredegar Town Centre - Other	£0.00	£0.00	£0.00	£0.00	£0.02	£2.04	£2.06	0.0%	£2.06
	Total within Study Area	£22.81	£19.33	£18.43	£8.08	£21.70	£26.92	£117.26		£122.26
Outside	Asda, Dowlais Top, Merthyr Tydfil	£0.36	£0.52	£0.27	£0.03	£0.13	£1.96	£3.26		
Outside	Merthyr Tydfil - Other	£0.61	£0.12	£0.10	£0.18	£0.19	£0.52	£1.73		
Outside	Blackwood - Any Store	£0.17	£0.00	£0.00	£0.07	£3.05	£0.00	£3.29		
Outside	Risca - Any Store	£0.02	£0.11	£0.50	£0.26	£1.23	£0.00	£2.13		
Outside	Abergavenny - Any Store	£0.18	£0.00	£0.25	£0.38	£0.64	£0.00	£1.45		
Outside	Cwmbran - Any Store	£0.12	£0.00	£0.04	£0.10	£0.16	£0.00	£0.42		
Outside	Other	£0.09	£0.04	£0.06	£0.13	£0.37	£0.11	£0.80		
	Total	£24.36	£20.11	£19.65	£9.22	£27.48	£29.51	£130.33		

Table A8.11: Comparison Expenditure by Goods Category

Survey Question	Comparison Spend per head by Category (£) (2018 prices)	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
	Cothing materials and garments	£575	£611	£607	£566	£567	£597
	Shoes & Other Footwear	£119	£122	£123	£116	£114	£119
Q09 & Q11	Total Clothing & Footwear	£694	£733	£730	£682	£681	£716
	Appliances for personal care	£246	£254	£259	£236	£238	£255
	Medical goods & other pharmaceutical Products	£69	£85	£76	£65	£66	£78
	Therapeutic appliances and equipment	£38	£45	£37	£34	£35	£41
Q13	Personal care, medical and pharmaceutical products and therapeutic appliances	£353	£384	£372	£335	£339	£374
	Games, toys & hobbies; sport & camping equipment; musical instruments	£244	£270	£263	£239	£223	£268
	Bicycles	£8	£11	£9	£8	£8	£10
Q15	Games, toys, hobby items, sports goods (including bicycles) and recreation equipment	£252	£281	£272	£247	£231	£278
	Audio visual, photographic & info processing equipment	£160	£177	£184	£161	£158	£171
	Recording media	£68	£65	£69	£66	£67	£67
Q17	Audio visual, photographic & info processing equipment such as computers or phones and recording materials	£228	£242	£253	£227	£225	£238
	Furniture and furnishings; carpets & other floor coverings	£207	£225	£219	£203	£203	£225
Q19	Furniture and furnishings; carpets & other floor coverings	£207	£225	£219	£203	£203	£225
	Household textiles	£82	£96	£98	£80	£84	£96
	Glassware, tableware and household utensils	£95	£104	£101	£92	£94	£103
Q21	Items for the house such as household textiles, glassware, tableware and household utensils	£177	£200	£199	£172	£178	£199
	Jewellery, clocks and watches	£94	£102	£102	£88	£95	£103
	Other personal effects	£49	£61	£58	£49	£46	£55
Q23	Jewellery, clocks, watches and other personal effects (such as travel or baby goods)	£143	£163	£160	£137	£141	£158
	Book & stationary	£89	£97	£92	£85	£86	£93
Q25	Book & stationary	£89	£97	£92	£85	£86	£93
	Major household appliances whether electric or not	£72	£85	£82	£72	£69	£86
	Small electrical household appliances	£19	£21	£19	£19	£20	£21
Q27	Appliances for the home (electrical or not)	£91	£106	£101	£91	£89	£107
	Materials for maintenance & repair of the dwelling	£8	£8	£8	£8	£8	£8
	Major tools and equipment	£11	£12	£11	£10	£10	£12
	Small tools and miscellaneous accessories	£90	£106	£93	£89	£87	£100
	Pets and related products	£84	£86	£86	£85	£85	£87
	Gardens, plants and flowers	£62	£73	£66	£61	£60	£69
Q29	DIY goods and equipment, items for the garden including plants and pet and related products	£255	£285	£264	£253	£250	£276
N/a	Other (Non-durable household goods)	£4	£4	£4	£4	£4	£4
	Total	£2,493	£2,720	£2,666	£2,436	£2,427	£2,668

Notes

Available Expenditure per head from Experian

Table A8.12: Comparison Expenditure by Goods Category (%)

Survey Question	Comparison Spend by Goods Category (%)	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
Q09 & Q11	Total Clothing & Footwear	27.9%	27.0%	27.4%	28.0%	28.1%	26.9%
Q13	Personal care, medical and pharmaceutical products and therapeutic appliances	14.2%	14.1%	14.0%	13.8%	14.0%	14.0%
Q15	Games, toys, hobby items, sports goods (including bicycles) and recreation equipment	10.1%	10.3%	10.2%	10.2%	9.5%	10.4%
Q17	Audio visual, photographic & info processing equipment such as computers or phones and recording materials	9.2%	8.9%	9.5%	9.3%	9.3%	8.9%
Q19	Furniture and furnishings; carpets & other floor coverings	8.3%	8.3%	8.2%	8.3%	8.4%	8.4%
Q21	Items for the house such as household textiles, glassware, tableware and household utensils	7.1%	7.4%	7.5%	7.1%	7.3%	7.5%
Q23	Jewellery, clocks, watches and other personal effects (such as travel or baby goods)	5.7%	6.0%	6.0%	5.6%	5.8%	5.9%
Q25	Book & stationary	3.6%	3.6%	3.5%	3.5%	3.5%	3.5%
Q27	Appliances for the home (electrical or not)	3.7%	3.9%	3.8%	3.7%	3.7%	4.0%
Q29	DIY goods and equipment, items for the garden including plants and pet and related products	10.2%	10.5%	9.9%	10.4%	10.3%	10.4%
N/a	Other (Non-durable household goods)						
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Notes

Derived from Table A8.11

Table A8.13: Comparison Expenditure by Goods Category in 2018 including SFT

Survey Question	Total Comparison Spend by Goods Category in Survey Area (£m)	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total	% All Comparison spend
	Available Expenditure 2018 (£m exc SFT)	£27.33	£23.85	£23.14	£10.48	£30.40	£34.14	£149.33	
Q09 & Q11	Total Clothing & Footwear	£7.62	£6.44	£6.34	£2.94	£8.54	£9.17	£41.06	27.5%
Q13	Personal care, medical and pharmaceutical products and therapeutic appliances	£3.88	£3.37	£3.23	£1.44	£4.25	£4.79	£20.97	14.0%
Q15	Games, toys, hobby items, sports goods (including bicycles) and recreation equipment	£2.77	£2.47	£2.36	£1.06	£2.90	£3.56	£15.12	10.1%
Q17	Audio visual, photographic & info processing equipment such as computers or phones and recording materials	£2.50	£2.12	£2.20	£0.98	£2.82	£3.05	£13.68	9.2%
Q19	Furniture and furnishings; carpets & other floor coverings	£2.27	£1.98	£1.90	£0.87	£2.55	£2.88	£12.46	8.3%
Q21	Items for the house such as household textiles, glassware, tableware and household utensils	£1.94	£1.76	£1.73	£0.74	£2.23	£2.55	£10.95	7.3%
Q23	Jewellery, clocks, watches and other personal effects (such as travel or baby goods)	£1.57	£1.43	£1.39	£0.59	£1.77	£2.02	£8.78	5.9%
Q25	Book & stationary	£0.98	£0.85	£0.80	£0.37	£1.08	£1.19	£5.27	3.5%
Q27	Appliances for the home (electrical or not)	£1.00	£0.93	£0.88	£0.39	£1.12	£1.37	£5.69	3.8%
Q29	DIY goods and equipment, items for the garden including plants and pet and related products	£2.80	£2.50	£2.29	£1.09	£3.14	£3.54	£15.36	10.3%
	Total / Average	£27.33	£23.85	£23.14	£10.48	£30.40	£34.14	£149.33	100.0%

Notes

Available Comparison Expenditure for 2018 from Table A8.5 (including SFT)

% spend from Table A8.12

Table A8.14A: Main Clothing & Footwear Location (Q09)

Zone	Main Clothing and Footwear Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	4.7%	14.1%	6.4%	3.0%	0.0%	2.1%	1.0%
1	Tesco, North West Approach, Ebbw Vale	0.5%	1.0%	0.0%	1.2%	0.0%	0.8%	0.0%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	6.8%	11.2%	8.1%	5.6%	7.6%	5.4%	4.1%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.2%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	2.4%	1.9%	1.0%	6.6%	6.8%	2.0%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	1.4%	0.0%	0.0%	6.7%	6.3%	0.0%	0.0%
3	Brynmawr Town Centre	0.4%	0.0%	0.0%	1.9%	1.6%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	1.3%	0.0%	0.0%	0.0%	0.0%	5.7%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	1.3%	0.9%	0.0%	1.2%	0.8%	0.8%	3.3%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	19.8%	21.3%	27.7%	18.7%	12.6%	2.4%	33.3%
Outside	Merthyr Tydfil - Elsewhere	0.8%	0.0%	1.1%	0.6%	0.0%	0.0%	2.3%
Outside	Cwmbran Town Centre	12.8%	4.4%	7.8%	17.4%	15.4%	28.9%	3.4%
Outside	Cwmbran - Elsewhere	1.0%	1.6%	0.0%	3.0%	1.4%	0.8%	0.0%
Outside	Cardiff City Centre	8.2%	7.1%	8.0%	4.1%	6.0%	7.9%	13.2%
Outside	Cardiff - Elsewhere	0.1%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
Outside	Newport City Centre	1.0%	0.0%	1.0%	1.2%	1.5%	2.5%	0.0%
Outside	Newport - Elsewhere	0.4%	1.0%	0.0%	1.2%	0.0%	0.0%	0.0%
Outside	Other	2.8%	2.0%	2.3%	1.9%	4.0%	3.7%	3.3%
	Internet / delivered	30.1%	28.7%	31.3%	21.5%	28.4%	36.1%	30.7%
	Home catalogue	1.1%	0.5%	1.0%	0.0%	5.3%	0.0%	2.3%
	TV / Interactive shopping	0.2%	0.0%	0.0%	1.2%	0.8%	0.0%	0.0%
	Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	(Don't know)	0.6%	0.5%	1.7%	1.2%	0.8%	0.0%	0.0%
	(Don’t do this type of shopping)	1.5%	3.0%	1.0%	1.8%	0.8%	0.4%	1.8%
	(Nowhere else)	0.3%	0.9%	0.6%	0.0%	0.0%	0.0%	0.0%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.14B: Main Clothing & Footwear Location (Q09) - exc SFT and null responses

Zone	Main Clothing and Footwear Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	7.1%	21.2%	10.0%	4.1%	0.0%	3.3%	1.5%
1	Tesco, North West Approach, Ebbw Vale	0.8%	1.6%	0.0%	1.6%	0.0%	1.2%	0.0%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	10.3%	16.8%	12.6%	7.5%	11.9%	8.5%	6.4%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.2%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	3.7%	2.9%	1.6%	8.9%	10.7%	3.2%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	2.2%	0.0%	0.0%	9.0%	9.8%	0.0%	0.0%
3	Brynmawr Town Centre	0.6%	0.0%	0.0%	2.5%	2.5%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	1.9%	0.0%	0.0%	0.0%	0.0%	9.0%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	2.0%	1.4%	0.0%	1.7%	1.2%	1.2%	5.0%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	29.9%	32.0%	43.0%	25.2%	19.8%	3.8%	51.0%
Outside	Merthyr Tydfil - Elsewhere	1.2%	0.0%	1.6%	0.8%	0.0%	0.0%	3.5%
Outside	Cwmbran Town Centre	19.3%	6.6%	12.1%	23.4%	24.1%	45.5%	5.2%
Outside	Cwmbran - Elsewhere	1.5%	2.4%	0.0%	4.0%	2.2%	1.3%	0.0%
Outside	Cardiff City Centre	12.4%	10.6%	12.4%	5.6%	9.3%	12.5%	20.2%
Outside	Cardiff - Elsewhere	0.1%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%
Outside	Newport City Centre	1.5%	0.0%	1.6%	1.7%	2.3%	3.9%	0.0%
Outside	Newport - Elsewhere	0.5%	1.5%	0.0%	1.6%	0.0%	0.0%	0.0%
Outside	Other	4.2%	3.0%	3.5%	2.5%	6.2%	5.8%	5.0%
	Internet / delivered							
	Home catalogue							
	TV / Interactive shopping							
	Other							
	(Don't know)							
	(Don’t do this type of shopping)							
	(Nowhere else)							
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.15A: Other Clothing & Footwear Locations (Q11)

Zone	Other Clothing and Footwear Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	5.6%	8.1%	6.4%	6.2%	11.7%	1.0%	5.7%
1	Tesco, North West Approach, Ebbw Vale	3.2%	7.0%	2.1%	0.0%	5.1%	2.4%	3.4%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Val	11.1%	13.8%	20.6%	5.7%	10.5%	6.1%	11.3%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.5%	0.7%	1.4%	0.0%	0.0%	0.0%	0.7%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	6.1%	3.4%	7.2%	7.2%	7.1%	10.0%	1.3%
3	Other Stores, Lakeside Retail Park, Brynmawr	4.4%	4.7%	4.9%	10.5%	0.0%	3.0%	2.2%
3	Brynmawr Town Centre	1.3%	0.0%	0.0%	8.1%	2.2%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	2.3%	0.0%	0.0%	1.6%	2.0%	7.7%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.6%	0.0%	0.0%	0.0%	0.0%	0.9%	2.1%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	2.8%	0.7%	6.4%	0.8%	0.0%	0.5%	7.2%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	20.9%	24.2%	30.6%	19.7%	11.9%	10.2%	27.8%
Outside	Merthyr Tydfil - Elsewhere	2.2%	0.7%	0.7%	0.0%	4.4%	0.0%	8.7%
Outside	Cwmbran Town Centre	19.2%	13.4%	17.9%	20.6%	20.3%	31.4%	8.5%
Outside	Cwmbran - Elsewhere	2.1%	0.7%	1.4%	2.4%	8.6%	3.3%	0.0%
Outside	Cardiff City Centre	17.5%	21.3%	19.4%	12.1%	14.6%	12.0%	24.5%
Outside	Cardiff - Elsewhere	0.8%	0.0%	0.0%	0.0%	2.0%	2.4%	0.0%
Outside	Newport City Centre	3.5%	2.6%	6.4%	4.9%	4.4%	3.9%	0.0%
Outside	Newport - Elsewhere	1.9%	1.3%	2.2%	1.6%	2.0%	3.9%	0.0%
Outside	Other	9.6%	5.3%	8.4%	11.5%	7.5%	14.2%	7.8%
	Internet / delivered	31.7%	29.6%	24.2%	29.8%	31.8%	29.4%	44.5%
	Home catalogue	1.6%	0.7%	2.1%	0.8%	4.4%	2.4%	0.7%
	TV / Interactive shopping	0.1%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%
	Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	(Don't know)	1.4%	4.7%	0.7%	0.8%	2.2%	0.5%	0.0%
	(Don't do this type of shopping)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	(Nowhere else)	1.8%	5.6%	0.0%	4.8%	1.1%	0.0%	0.0%
	Total	152.1%	148.6%	163.0%	149.8%	153.7%	145.0%	156.6%

Table A8.15B: Other Clothing & Footwear Shopping Destinations (Q11) - exc null responses and rebased to 100%

Zone	Other Clothing and Footwear Locations	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	3.7%	5.9%	4.0%	4.3%	7.8%	0.7%	3.6%
1	Tesco, North West Approach, Ebbw Vale	2.2%	5.1%	1.3%	0.0%	3.4%	1.7%	2.2%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Val	7.4%	10.0%	12.7%	4.0%	7.0%	4.2%	7.2%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.3%	0.5%	0.8%	0.0%	0.0%	0.0%	0.5%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	4.1%	2.4%	4.4%	5.0%	4.8%	6.9%	0.9%
3	Other Stores, Lakeside Retail Park, Brynmawr	2.9%	3.4%	3.0%	7.2%	0.0%	2.1%	1.4%
3	Brynmawr Town Centre	0.9%	0.0%	0.0%	5.6%	1.4%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	1.5%	0.0%	0.0%	1.1%	1.3%	5.3%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.4%	0.0%	0.0%	0.0%	0.0%	0.6%	1.3%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	1.9%	0.5%	4.0%	0.6%	0.0%	0.3%	4.6%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	14.0%	17.5%	18.8%	13.6%	7.9%	7.0%	17.7%
Outside	Merthyr Tydfil - Elsewhere	1.5%	0.5%	0.4%	0.0%	2.9%	0.0%	5.6%
Outside	Cwmbran Town Centre	12.9%	9.7%	11.0%	14.3%	13.5%	21.7%	5.4%
Outside	Cwmbran - Elsewhere	1.4%	0.5%	0.8%	1.7%	5.7%	2.3%	0.0%
Outside	Cardiff City Centre	11.7%	15.4%	12.0%	8.4%	9.7%	8.3%	15.7%
Outside	Cardiff - Elsewhere	0.5%	0.0%	0.0%	0.0%	1.4%	1.7%	0.0%
Outside	Newport City Centre	2.3%	1.9%	3.9%	3.4%	2.9%	2.7%	0.0%
Outside	Newport - Elsewhere	1.3%	0.9%	1.4%	1.1%	1.3%	2.7%	0.0%
Outside	Other	6.4%	3.8%	5.2%	8.0%	5.0%	9.8%	5.0%
	Internet / delivered	21.3%	21.4%	14.9%	20.7%	21.2%	20.3%	28.4%
	Home catalogue	1.1%	0.5%	1.3%	0.6%	2.9%	1.7%	0.5%
	TV / Interactive shopping	0.1%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.15C: Other Clothing & Footwear Shopping Destinations (Q11) - exc SFT

Zone	Other Clothing and Footwear Locations	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	4.8%	7.5%	4.7%	5.5%	10.3%	0.9%	5.1%
1	Tesco, North West Approach, Ebbw Vale	2.8%	6.5%	1.5%	0.0%	4.5%	2.1%	3.1%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Val	9.6%	12.8%	15.1%	5.1%	9.2%	5.4%	10.1%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.4%	0.7%	1.0%	0.0%	0.0%	0.0%	0.7%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	5.3%	3.1%	5.3%	6.4%	6.3%	8.8%	1.2%
3	Other Stores, Lakeside Retail Park, Brynmawr	3.8%	4.4%	3.6%	9.3%	0.0%	2.6%	2.0%
3	Brynmawr Town Centre	1.2%	0.0%	0.0%	7.2%	1.9%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	2.0%	0.0%	0.0%	1.4%	1.7%	6.8%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.6%	0.0%	0.0%	0.0%	0.0%	0.8%	1.9%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	2.4%	0.7%	4.7%	0.7%	0.0%	0.4%	6.5%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	18.1%	22.4%	22.5%	17.4%	10.4%	9.0%	24.9%
Outside	Merthyr Tydfil - Elsewhere	1.9%	0.7%	0.5%	0.0%	3.8%	0.0%	7.8%
Outside	Cwmbran Town Centre	16.6%	12.4%	13.1%	18.3%	17.7%	27.8%	7.6%
Outside	Cwmbran - Elsewhere	1.8%	0.7%	1.0%	2.1%	7.5%	2.9%	0.0%
Outside	Cardiff City Centre	15.1%	19.7%	14.3%	10.7%	12.8%	10.6%	22.0%
Outside	Cardiff - Elsewhere	0.6%	0.0%	0.0%	0.0%	1.8%	2.1%	0.0%
Outside	Newport City Centre	3.0%	2.4%	4.7%	4.3%	3.8%	3.5%	0.0%
Outside	Newport - Elsewhere	1.7%	1.2%	1.6%	1.4%	1.7%	3.4%	0.0%
Outside	Other	8.3%	4.9%	6.2%	10.2%	6.5%	12.6%	7.0%
	Internet / delivered							
	Home catalogue							
	TV / Interactive shopping							
	Other							
	(Don't know)							
	(Don’t do this type of shopping)							
	(Nowhere else)							
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.15D: Clothing & Footwear Market Shares

Zone	Overall Market Shares for Clothing and Footwear	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	6.3%	16.4%	8.1%	4.6%	3.6%	2.4%	2.8%
1	Tesco, North West Approach, Ebbw Vale	1.5%	3.3%	0.5%	1.0%	1.6%	1.5%	1.1%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	10.0%	15.4%	13.5%	6.6%	11.0%	7.5%	7.7%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.3%	0.2%	1.4%	0.0%	0.0%	0.0%	0.2%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	4.2%	3.0%	2.9%	8.0%	9.1%	5.2%	0.4%
3	Other Stores, Lakeside Retail Park, Brynmawr	2.7%	1.5%	1.3%	9.1%	6.4%	0.9%	0.7%
3	Brynmawr Town Centre	0.8%	0.0%	0.0%	4.1%	2.3%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	1.9%	0.0%	0.0%	0.5%	0.6%	8.3%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.5%	0.0%	0.0%	0.0%	0.0%	0.3%	2.1%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	2.1%	1.2%	1.7%	1.3%	0.8%	1.0%	5.5%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	25.8%	28.7%	35.8%	22.5%	16.5%	5.6%	41.9%
Outside	Merthyr Tydfil - Elsewhere	1.4%	0.2%	1.2%	0.5%	1.3%	0.0%	5.0%
Outside	Cwmbran Town Centre	18.4%	8.6%	12.5%	21.6%	21.9%	39.3%	6.0%
Outside	Cwmbran - Elsewhere	1.6%	1.8%	0.4%	3.4%	4.1%	1.9%	0.0%
Outside	Cardiff City Centre	13.4%	13.8%	13.1%	7.4%	10.5%	11.8%	20.8%
Outside	Cardiff - Elsewhere	0.3%	0.0%	0.0%	0.0%	0.6%	1.2%	0.0%
Outside	Newport City Centre	2.0%	0.8%	2.7%	2.6%	2.8%	3.8%	0.0%
Outside	Newport - Elsewhere	0.9%	1.4%	0.6%	1.5%	0.6%	1.2%	0.0%
Outside	Other	5.7%	3.7%	4.4%	5.2%	6.3%	8.2%	5.7%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Notes

Based on 65% spend at Main Clothing & Footwear destination (Table A8.14B) and 35% at 'Other' outlets (Table A8.15C)

Table A8.16A: % Spend at Main Clothing / Footwear Location (Q10)

% Spend at Main Clothing & Footwear Location (Q10)	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
None	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1 - 10%	1.4%	2.7%	2.1%	0.6%	0.8%	0.0%	1.8%
11 - 20%	3.1%	5.7%	2.3%	6.1%	3.1%	1.5%	1.0%
21 - 30%	5.5%	5.6%	2.8%	10.4%	4.0%	7.1%	2.8%
31 - 40%	2.4%	3.1%	1.1%	3.0%	1.6%	2.1%	2.8%
41 - 50%	21.7%	23.2%	23.3%	17.1%	19.5%	26.7%	18.2%
51 - 60%	6.8%	3.6%	10.0%	11.1%	5.5%	2.9%	8.5%
61 - 70%	7.5%	4.1%	9.1%	3.6%	8.6%	8.0%	10.6%
71 - 80%	17.5%	15.8%	16.6%	14.4%	15.8%	22.2%	17.2%
81 - 90%	8.4%	8.1%	9.5%	8.5%	12.3%	11.6%	3.3%
91 - 99%	2.3%	4.2%	1.7%	1.8%	2.4%	3.6%	0.0%
100%	19.4%	18.2%	18.6%	16.4%	25.5%	12.9%	27.6%
(Don't know / varies)	4.2%	5.7%	2.9%	7.0%	0.8%	1.3%	6.2%

Table A8.16B: % Spend at Main Clothing / Footwear Location (Q10) - Cumulative

% Spend at Main Clothing & Footwear Shop (Q0)	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
None	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1 - 10%	1.4%	2.7%	2.1%	0.6%	0.8%	0.0%	1.8%
11 - 20%	4.4%	8.4%	4.4%	6.7%	3.9%	1.5%	2.7%
21 - 30%	9.9%	14.1%	7.2%	17.1%	7.9%	8.7%	5.6%
31 - 40%	12.3%	17.1%	8.3%	20.1%	9.5%	10.8%	8.4%
41 - 50%	34.0%	40.3%	31.6%	37.2%	28.9%	37.5%	26.6%
51 - 60%	40.8%	43.9%	41.6%	48.3%	34.5%	40.3%	35.1%
61 - 70%	48.2%	48.1%	50.7%	51.9%	43.1%	48.4%	45.7%
71 - 80%	65.7%	63.8%	67.4%	66.3%	58.9%	70.5%	62.9%
81 - 90%	74.1%	71.9%	76.8%	74.8%	71.2%	82.2%	66.2%
91 - 99%	76.4%	76.1%	78.5%	76.6%	73.7%	85.8%	66.2%
100%	95.8%	94.3%	97.1%	93.0%	99.2%	98.7%	93.8%
(Don't know / varies)	4.2%	5.7%	2.9%	7.0%	0.8%	1.3%	6.2%

Table A8.16C: % Spend at Main Clothing / Footwear Location (Q10) - Cumulative excluding null responses

% Spend at Main Clothing & Footwear Shop (Q0)	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
None	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1 - 10%	1.4%	2.9%	2.2%	0.7%	0.8%	0.0%	1.9%
11 - 20%	4.6%	9.0%	4.6%	7.2%	3.9%	1.6%	2.9%
21 - 30%	10.4%	14.9%	7.5%	18.4%	7.9%	8.8%	6.0%
31 - 40%	12.8%	18.2%	8.6%	21.6%	9.5%	10.9%	8.9%
41 - 50%	35.5%	42.7%	32.5%	40.0%	29.2%	38.0%	28.4%
51 - 60%	42.6%	46.6%	42.8%	51.9%	34.7%	40.9%	37.4%
61 - 70%	50.4%	50.9%	52.2%	55.8%	43.4%	49.0%	48.7%
71 - 80%	68.6%	67.6%	69.4%	71.3%	59.4%	71.5%	67.1%
81 - 90%	77.3%	76.2%	79.1%	80.4%	71.8%	83.2%	70.6%
91 - 99%	79.7%	80.7%	80.8%	82.4%	74.3%	86.9%	70.6%
100%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.17A: Personal care and medical goods Market Share (Q13)

Zone	Personal Care and Medical Goods Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	32.8%	75.1%	78.1%	8.8%	8.9%	10.7%	10.9%
1	Tesco, North West Approach, Ebbw Vale	7.4%	15.1%	14.5%	5.3%	0.8%	2.5%	4.3%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	0.4%	1.6%	0.0%	0.6%	0.0%	0.0%	0.0%
1	Zone 1 - Other	1.9%	9.6%	1.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	6.0%	4.1%	15.4%	6.0%	0.8%	1.6%	6.8%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	2.4%	4.0%	6.5%	1.1%	0.8%	2.0%	0.0%
2	Zone 2 - Other	1.4%	0.5%	4.5%	1.7%	0.0%	0.0%	1.4%
3	Asda, Lakeside Retail Park, Brynmawr	10.2%	1.9%	8.1%	24.1%	32.9%	11.3%	0.9%
3	Other Stores, Lakeside Retail Park, Brynmawr	6.8%	1.6%	2.8%	17.3%	12.1%	12.0%	0.0%
3	Brynmawr Town Centre	10.0%	0.0%	4.5%	56.3%	11.6%	0.4%	0.0%
3	Zone 3 - Other	0.3%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%
4	Blaina Town Centre	4.4%	0.0%	0.0%	5.2%	50.8%	0.4%	0.0%
5	Abertillery Town Centre	15.4%	0.0%	0.0%	0.0%	8.5%	66.8%	0.0%
5	Zone 5 - Other	1.1%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%
6	Tredegar Town Centre	18.4%	0.9%	1.0%	1.1%	0.0%	0.0%	81.2%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	0.6%	0.0%	1.6%	0.0%	2.2%	0.0%	1.0%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	5.7%	5.1%	7.6%	4.7%	5.4%	3.3%	8.0%
Outside	Merthyr Tydfil - Elsewhere	1.0%	0.0%	3.2%	0.6%	0.0%	0.4%	1.4%
Outside	Cwmbran Town Centre	4.0%	3.6%	0.0%	2.2%	7.9%	11.3%	0.0%
Outside	Cwmbran - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Cardiff City Centre	1.4%	1.0%	0.0%	0.0%	0.0%	3.8%	1.9%
Outside	Cardiff - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Newport City Centre	0.6%	0.0%	1.0%	0.0%	0.8%	1.2%	0.5%
Outside	Newport - Elsewhere	0.3%	0.5%	0.0%	1.2%	0.0%	0.0%	0.0%
Outside	Other	6.4%	2.1%	2.3%	1.9%	6.1%	20.0%	2.7%
	Internet / delivered	10.8%	8.2%	12.5%	5.8%	9.4%	8.2%	17.9%
	Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Home catalogue	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	TV / Interactive shopping	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	(Don't know)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	(Don't do this type of shopping)	2.4%	4.1%	0.6%	0.6%	0.0%	2.6%	4.2%
	(Nowhere else)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total	151.9%	138.9%	165.2%	146.4%	159.0%	163.1%	142.9%

Table A8.17B: Personal Care Destinations (Q13) - exc null responses and rebased to 100%

Zone	Personal Care and Medical Goods Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	21.9%	55.7%	47.4%	6.0%	5.6%	6.6%	7.8%
1	Tesco, North West Approach, Ebbw Vale	4.9%	11.2%	8.8%	3.7%	0.5%	1.5%	3.1%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	0.3%	1.2%	0.0%	0.4%	0.0%	0.0%	0.0%
1	Zone 1 - Other	1.3%	7.2%	0.6%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	4.0%	3.0%	9.3%	4.1%	0.5%	1.0%	4.9%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	1.6%	3.0%	3.9%	0.8%	0.5%	1.2%	0.0%
2	Zone 2 - Other	0.9%	0.4%	2.7%	1.2%	0.0%	0.0%	1.0%
3	Asda, Lakeside Retail Park, Brynmawr	6.8%	1.4%	4.9%	16.5%	20.7%	7.0%	0.6%
3	Other Stores, Lakeside Retail Park, Brynmawr	4.5%	1.2%	1.7%	11.8%	7.6%	7.4%	0.0%
3	Brynmawr Town Centre	6.7%	0.0%	2.7%	38.6%	7.3%	0.3%	0.0%
3	Zone 3 - Other	0.2%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%
4	Blaina Town Centre	3.0%	0.0%	0.0%	3.6%	31.9%	0.3%	0.0%
5	Abertillery Town Centre	10.3%	0.0%	0.0%	0.0%	5.3%	41.6%	0.0%
5	Zone 5 - Other	0.7%	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%
6	Tredegar Town Centre	12.3%	0.7%	0.6%	0.8%	0.0%	0.0%	58.6%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	0.4%	0.0%	1.0%	0.0%	1.4%	0.0%	0.7%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	3.8%	3.8%	4.6%	3.2%	3.4%	2.0%	5.7%
Outside	Merthyr Tydfil - Elsewhere	0.7%	0.0%	1.9%	0.4%	0.0%	0.3%	1.0%
Outside	Cwmbran Town Centre	2.7%	2.6%	0.0%	1.5%	5.0%	7.0%	0.0%
Outside	Cwmbran - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Cardiff City Centre	1.0%	0.7%	0.0%	0.0%	0.0%	2.4%	1.4%
Outside	Cardiff - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Newport City Centre	0.4%	0.0%	0.6%	0.0%	0.5%	0.7%	0.3%
Outside	Newport - Elsewhere	0.2%	0.4%	0.0%	0.8%	0.0%	0.0%	0.0%
Outside	Other	4.3%	1.6%	1.4%	1.3%	3.9%	12.4%	1.9%
	Internet / delivered	7.2%	6.1%	7.6%	4.0%	5.9%	5.1%	12.9%
	Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Home catalogue	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	TV / Interactive shopping	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	(Don't know)							
	(Don't do this type of shopping)							
	(Nowhere else)							
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.17C: Personal Care Destinations (Q13) - exc null responses, rebased to 100% and exc SFT

Zone	Personal Care and Medical Goods Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	23.6%	59.3%	51.3%	6.3%	5.9%	7.0%	9.0%
1	Tesco, North West Approach, Ebbw Vale	5.3%	11.9%	9.6%	3.8%	0.5%	1.6%	3.5%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	0.3%	1.2%	0.0%	0.4%	0.0%	0.0%	0.0%
1	Zone 1 - Other	1.4%	7.6%	0.7%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	4.3%	3.2%	10.1%	4.3%	0.5%	1.1%	5.6%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	1.7%	3.2%	4.3%	0.8%	0.5%	1.3%	0.0%
2	Zone 2 - Other	1.0%	0.4%	3.0%	1.2%	0.0%	0.0%	1.1%
3	Asda, Lakeside Retail Park, Brynmawr	7.3%	1.5%	5.3%	17.2%	22.0%	7.4%	0.7%
3	Other Stores, Lakeside Retail Park, Brynmawr	4.9%	1.2%	1.8%	12.3%	8.1%	7.8%	0.0%
3	Brynmawr Town Centre	7.2%	0.0%	3.0%	40.2%	7.7%	0.3%	0.0%
3	Zone 3 - Other	0.2%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%
4	Blaina Town Centre	3.2%	0.0%	0.0%	3.7%	33.9%	0.3%	0.0%
5	Abertillery Town Centre	11.1%	0.0%	0.0%	0.0%	5.7%	43.8%	0.0%
5	Zone 5 - Other	0.8%	0.0%	0.0%	0.0%	0.0%	3.1%	0.0%
6	Tredegar Town Centre	13.3%	0.7%	0.7%	0.8%	0.0%	0.0%	67.3%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	0.4%	0.0%	1.1%	0.0%	1.5%	0.0%	0.8%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	4.1%	4.0%	5.0%	3.4%	3.6%	2.1%	6.6%
Outside	Merthyr Tydfil - Elsewhere	0.7%	0.0%	2.1%	0.4%	0.0%	0.3%	1.1%
Outside	Cwmbran Town Centre	2.9%	2.8%	0.0%	1.6%	5.3%	7.4%	0.0%
Outside	Cwmbran - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Cardiff City Centre	1.0%	0.8%	0.0%	0.0%	0.0%	2.5%	1.6%
Outside	Cardiff - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Newport City Centre	0.4%	0.0%	0.7%	0.0%	0.5%	0.8%	0.4%
Outside	Newport - Elsewhere	0.2%	0.4%	0.0%	0.8%	0.0%	0.0%	0.0%
Outside	Other	4.6%	1.7%	1.5%	1.3%	4.1%	13.1%	2.2%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.18A: Recreational Goods Market Share (Q15)

Zone	Recreational Goods Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	9.7%	20.2%	13.3%	5.9%	7.2%	5.0%	6.4%
1	Tesco, North West Approach, Ebbw Vale	0.9%	1.0%	0.0%	0.0%	1.4%	0.8%	1.8%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	7.6%	7.6%	13.7%	3.6%	0.8%	8.2%	7.4%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.7%	0.0%	2.7%	0.0%	0.0%	0.0%	1.4%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.4%	1.6%	0.6%	0.0%	0.8%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	2.5%	0.0%	3.4%	5.9%	9.4%	2.1%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	1.8%	0.0%	1.7%	2.5%	5.4%	3.4%	0.0%
3	Brynmawr Town Centre	0.4%	0.0%	0.0%	1.8%	2.4%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	0.4%	0.0%	0.0%	0.0%	0.8%	1.7%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	0.8%	0.9%	1.0%	0.0%	0.0%	0.0%	2.2%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	7.3%	4.0%	12.0%	8.2%	1.6%	3.3%	11.9%
Outside	Merthyr Tydfil - Elsewhere	1.3%	0.0%	5.4%	0.0%	0.0%	0.8%	1.4%
Outside	Cwmbran Town Centre	7.1%	4.3%	1.6%	4.0%	11.0%	20.3%	0.9%
Outside	Cwmbran - Elsewhere	0.6%	0.5%	0.0%	0.0%	3.8%	1.2%	0.0%
Outside	Cardiff City Centre	6.0%	3.4%	9.2%	3.4%	14.4%	3.7%	7.1%
Outside	Cardiff - Elsewhere	0.2%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Newport City Centre	1.1%	0.0%	1.7%	0.0%	3.9%	2.6%	0.0%
Outside	Newport - Elsewhere	3.2%	4.6%	4.4%	0.0%	2.2%	6.7%	0.0%
Outside	Other	3.4%	2.0%	1.6%	2.4%	3.7%	8.3%	1.4%
	Internet / delivered	38.6%	35.3%	39.7%	37.9%	30.1%	41.9%	40.5%
	Home catalogue	0.1%	0.0%	0.0%	0.6%	0.8%	0.0%	0.0%
	TV / Interactive shopping	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	(Don't know)	0.6%	1.9%	0.0%	0.6%	0.0%	0.0%	0.9%
	(Don't do this type of shopping)	37.9%	37.2%	33.3%	46.0%	41.4%	30.9%	42.2%
	Total	132.9%	125.5%	145.3%	122.9%	141.0%	140.9%	126.2%

Table A8.18B: Recreational Goods Market Share (Q15) - exc null responses and rebased to 100%

Zone	Personal Care and Medical Goods Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	10.3%	23.4%	11.9%	7.7%	7.2%	4.6%	7.7%
1	Tesco, North West Approach, Ebbw Vale	0.9%	1.1%	0.0%	0.0%	1.4%	0.7%	2.2%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	8.0%	8.8%	12.2%	4.7%	0.8%	7.4%	8.9%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.8%	0.0%	2.4%	0.0%	0.0%	0.0%	1.7%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.5%	1.8%	0.5%	0.0%	0.8%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	2.7%	0.0%	3.0%	7.7%	9.4%	1.9%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	1.9%	0.0%	1.5%	3.2%	5.4%	3.1%	0.0%
3	Brynmawr Town Centre	0.5%	0.0%	0.0%	2.4%	2.4%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	0.5%	0.0%	0.0%	0.0%	0.8%	1.5%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	0.9%	1.1%	0.9%	0.0%	0.0%	0.0%	2.7%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	7.7%	4.6%	10.7%	10.8%	1.6%	3.0%	14.3%
Outside	Merthyr Tydfil - Elsewhere	1.4%	0.0%	4.8%	0.0%	0.0%	0.7%	1.6%
Outside	Cwmbran Town Centre	7.5%	5.0%	1.4%	5.3%	11.0%	18.5%	1.1%
Outside	Cwmbran - Elsewhere	0.7%	0.6%	0.0%	0.0%	3.8%	1.1%	0.0%
Outside	Cardiff City Centre	6.3%	3.9%	8.2%	4.5%	14.4%	3.4%	8.5%
Outside	Cardiff - Elsewhere	0.2%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Newport City Centre	1.2%	0.0%	1.5%	0.0%	3.9%	2.3%	0.0%
Outside	Newport - Elsewhere	3.4%	5.4%	4.0%	0.0%	2.2%	6.1%	0.0%
Outside	Other	3.6%	2.3%	1.4%	3.1%	3.7%	7.6%	1.6%
	Internet / delivered	40.9%	40.9%	35.4%	49.7%	30.2%	38.1%	48.6%
	Home catalogue	0.2%	0.0%	0.0%	0.8%	0.8%	0.0%	0.0%
	TV / Interactive shopping	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.18C: Recreational Goods Market Share (Q15) - exc null responses and rebased to 100% and exc SFT

Zone	Personal Care and Medical Goods Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	17.5%	39.6%	18.4%	15.6%	10.4%	7.4%	14.9%
1	Tesco, North West Approach, Ebbw Vale	1.5%	1.9%	0.0%	0.0%	2.1%	1.1%	4.3%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	13.6%	14.9%	18.9%	9.6%	1.1%	12.0%	17.3%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	1.3%	0.0%	3.7%	0.0%	0.0%	0.0%	3.3%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.8%	3.1%	0.8%	0.0%	1.2%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	4.6%	0.0%	4.7%	15.6%	13.7%	3.1%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	3.1%	0.0%	2.3%	6.5%	7.9%	5.0%	0.0%
3	Brynmawr Town Centre	0.8%	0.0%	0.0%	4.9%	3.5%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	0.8%	0.0%	0.0%	0.0%	1.2%	2.5%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	1.5%	1.8%	1.4%	0.0%	0.0%	0.0%	5.2%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	13.1%	7.8%	16.6%	21.8%	2.3%	4.8%	27.9%
Outside	Merthyr Tydfil - Elsewhere	2.4%	0.0%	7.4%	0.0%	0.0%	1.2%	3.2%
Outside	Cwmbran Town Centre	12.7%	8.4%	2.2%	10.6%	16.0%	29.8%	2.1%
Outside	Cwmbran - Elsewhere	1.1%	1.0%	0.0%	0.0%	5.6%	1.7%	0.0%
Outside	Cardiff City Centre	10.7%	6.6%	12.7%	9.1%	20.9%	5.5%	16.5%
Outside	Cardiff - Elsewhere	0.3%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Newport City Centre	2.0%	0.0%	2.3%	0.0%	5.6%	3.7%	0.0%
Outside	Newport - Elsewhere	5.7%	9.1%	6.1%	0.0%	3.2%	9.9%	0.0%
Outside	Other	6.0%	3.9%	2.2%	6.3%	5.4%	12.2%	3.2%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.19A: Audio Visual Goods Market Share (Q17)

Zone	Audio Visual Goods Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	13.1%	19.6%	18.6%	13.7%	7.7%	7.4%	10.8%
1	Tesco, North West Approach, Ebbw Vale	2.2%	2.0%	2.1%	4.4%	0.0%	1.3%	2.8%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	0.2%	0.0%	0.0%	0.0%	3.2%	0.0%	0.0%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.6%	0.0%	0.0%	1.9%	0.0%	0.0%	1.4%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.2%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	3.5%	0.5%	4.4%	11.1%	9.3%	2.1%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	0.2%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%
3	Brynmawr Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	0.7%	0.0%	0.0%	0.0%	2.4%	2.4%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	1.2%	0.0%	5.0%	0.0%	0.0%	0.0%	1.9%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	37.9%	38.2%	49.1%	41.8%	37.7%	0.2%	44.8%
Outside	Merthyr Tydfil - Elsewhere	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%
Outside	Cwmbran Town Centre	2.5%	0.0%	1.0%	1.9%	5.6%	7.4%	0.0%
Outside	Cwmbran - Elsewhere	9.6%	1.0%	1.7%	6.5%	5.3%	35.8%	0.0%
Outside	Cardiff City Centre	1.4%	1.9%	1.1%	0.0%	3.2%	1.2%	1.9%
Outside	Cardiff - Elsewhere	0.2%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%
Outside	Newport City Centre	0.6%	0.0%	0.0%	2.5%	0.0%	1.3%	0.0%
Outside	Newport - Elsewhere	1.1%	0.0%	0.0%	0.0%	0.8%	4.9%	0.0%
Outside	Other	2.8%	1.0%	0.0%	3.0%	3.1%	7.0%	1.9%
	Internet / delivered	42.6%	36.8%	43.6%	32.9%	33.4%	57.2%	41.7%
	Home catalogue	0.6%	0.9%	0.0%	1.1%	0.8%	0.8%	0.0%
	TV / Interactive shopping	0.6%	1.6%	1.7%	0.0%	0.0%	0.0%	0.0%
	(Don't know)	0.8%	0.0%	3.4%	0.0%	1.6%	0.8%	0.0%
	(Don’t do this type of shopping)	14.2%	25.3%	4.9%	17.6%	10.0%	8.0%	16.8%
	Total	137.5%	128.8%	137.8%	139.6%	126.3%	137.6%	126.9%

Table A8.19B: Audio Visual Goods Market Share (Q17) - exc null responses and rebased to 100%

Zone	Audio Visual Goods Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	10.7%	18.9%	14.3%	11.3%	6.7%	5.7%	9.8%
1	Tesco, North West Approach, Ebbw Vale	1.8%	1.9%	1.6%	3.6%	0.0%	1.0%	2.6%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	0.2%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.5%	0.0%	0.0%	1.5%	0.0%	0.0%	1.3%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.1%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	2.9%	0.5%	3.4%	9.1%	8.1%	1.6%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	0.1%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%
3	Brynmawr Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	0.6%	0.0%	0.0%	0.0%	2.1%	1.8%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	1.0%	0.0%	3.9%	0.0%	0.0%	0.0%	1.7%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	31.0%	36.9%	37.9%	34.3%	32.9%	0.1%	40.7%
Outside	Merthyr Tydfil - Elsewhere	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%
Outside	Cwmbran Town Centre	2.0%	0.0%	0.8%	1.5%	4.9%	5.8%	0.0%
Outside	Cwmbran - Elsewhere	7.9%	0.9%	1.3%	5.3%	4.6%	27.8%	0.0%
Outside	Cardiff City Centre	1.2%	1.8%	0.9%	0.0%	2.8%	0.9%	1.7%
Outside	Cardiff - Elsewhere	0.1%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%
Outside	Newport City Centre	0.5%	0.0%	0.0%	2.0%	0.0%	1.0%	0.0%
Outside	Newport - Elsewhere	0.9%	0.0%	0.0%	0.0%	0.7%	3.8%	0.0%
Outside	Other	2.3%	0.9%	0.0%	2.5%	2.7%	5.4%	1.8%
	Internet / delivered	34.8%	35.6%	33.6%	27.0%	29.1%	44.4%	37.9%
	Home catalogue	0.5%	0.9%	0.0%	0.9%	0.7%	0.6%	0.0%
	TV / Interactive shopping	0.5%	1.5%	1.3%	0.0%	0.0%	0.0%	0.0%
	(Don't know)							
	(Don’t do this type of shopping)							
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.19C: Audio Visual Goods Market Share (Q17) - exc SFT and null responses and rebased to 100%

Zone	Audio Visual Goods Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	16.6%	30.6%	22.0%	15.6%	9.5%	10.4%	15.7%
1	Tesco, North West Approach, Ebbw Vale	2.8%	3.1%	2.5%	5.0%	0.0%	1.8%	4.1%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	0.3%	0.0%	0.0%	0.0%	4.0%	0.0%	0.0%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.8%	0.0%	0.0%	2.1%	0.0%	0.0%	2.1%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.2%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	4.5%	0.8%	5.3%	12.6%	11.6%	2.9%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	0.2%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%
3	Brynmawr Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	0.9%	0.0%	0.0%	0.0%	3.0%	3.3%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	1.5%	0.0%	5.9%	0.0%	0.0%	0.0%	2.7%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	48.1%	59.5%	58.3%	47.6%	46.8%	0.3%	65.5%
Outside	Merthyr Tydfil - Elsewhere	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%
Outside	Cwmbran Town Centre	3.1%	0.0%	1.2%	2.1%	6.9%	10.5%	0.0%
Outside	Cwmbran - Elsewhere	12.2%	1.5%	2.0%	7.4%	6.6%	50.6%	0.0%
Outside	Cardiff City Centre	1.8%	3.0%	1.3%	0.0%	4.0%	1.7%	2.8%
Outside	Cardiff - Elsewhere	0.2%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%
Outside	Newport City Centre	0.8%	0.0%	0.0%	2.8%	0.0%	1.8%	0.0%
Outside	Newport - Elsewhere	1.4%	0.0%	0.0%	0.0%	1.0%	6.9%	0.0%
Outside	Other	3.6%	1.5%	0.0%	3.4%	3.8%	9.8%	2.8%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.20A: Furniture, carpets & floor coverings Market Share (Q19)

Zone	Furniture / Carpets & Floor Coverings Goods Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	14.7%	25.9%	26.2%	10.1%	5.4%	7.4%	10.6%
1	Tesco, North West Approach, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	0.6%	0.0%	1.0%	0.0%	1.5%	0.0%	1.4%
1	Zone 1 - Other	0.6%	0.0%	0.0%	0.0%	1.4%	2.0%	0.5%
2	Morrisons, Beaufort Road, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.1%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	0.7%	0.0%	1.0%	1.8%	0.8%	0.8%	0.0%
3	Brynmawr Town Centre	4.3%	2.5%	6.5%	11.7%	7.0%	1.6%	0.9%
3	Zone 3 - Other	3.1%	2.8%	8.1%	5.9%	3.2%	0.8%	0.0%
4	Blaina Town Centre	1.1%	0.0%	1.7%	2.9%	5.4%	0.0%	0.0%
5	Abertillery Town Centre	5.5%	0.0%	0.0%	2.3%	10.8%	20.1%	0.0%
5	Zone 5 - Other	0.3%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%
6	Tredegar Town Centre	6.3%	1.5%	6.1%	1.2%	0.0%	0.0%	22.0%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	2.7%	4.8%	3.3%	1.8%	0.0%	1.3%	3.2%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	13.1%	11.2%	15.1%	18.1%	11.9%	5.3%	18.2%
Outside	Merthyr Tydfil - Elsewhere	1.4%	1.0%	0.6%	3.7%	0.8%	0.4%	1.8%
Outside	Cwmbran Town Centre	3.0%	3.3%	2.1%	0.0%	2.2%	8.6%	0.0%
Outside	Cwmbran - Elsewhere	3.3%	1.9%	0.0%	4.6%	3.7%	9.3%	0.0%
Outside	Cardiff City Centre	6.1%	5.9%	5.6%	4.1%	7.5%	6.2%	7.5%
Outside	Cardiff - Elsewhere	9.1%	6.4%	7.7%	8.7%	12.0%	13.0%	7.8%
Outside	Newport City Centre	0.9%	1.9%	0.0%	0.0%	0.8%	1.7%	0.5%
Outside	Newport - Elsewhere	3.4%	6.9%	1.6%	2.9%	6.2%	4.1%	0.5%
Outside	Other	5.8%	3.4%	8.3%	9.1%	5.2%	7.3%	2.3%
	Internet / delivered	21.8%	14.0%	30.9%	15.2%	18.3%	35.1%	14.4%
	Home catalogue	0.7%	0.9%	0.0%	1.7%	1.4%	0.8%	0.0%
	TV / Interactive shopping	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	(Don't know)	3.6%	7.0%	0.0%	4.8%	2.4%	0.8%	5.6%
	(Don't do this type of shopping)	22.6%	29.3%	15.1%	25.8%	23.6%	12.6%	29.9%
	Total	134.6%	130.7%	140.8%	136.4%	132.9%	140.3%	127.0%

Table A8.20B: Furniture, carpets & floor coverings Market Share (Q19) - exc null responses and rebased to 100%

Zone	Furniture / Carpets & Floor Coverings Goods Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	13.6%	27.4%	20.8%	9.5%	5.1%	5.8%	11.5%
1	Tesco, North West Approach, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	0.5%	0.0%	0.8%	0.0%	1.4%	0.0%	1.5%
1	Zone 1 - Other	0.6%	0.0%	0.0%	0.0%	1.3%	1.6%	0.5%
2	Morrisons, Beaufort Road, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.1%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	0.6%	0.0%	0.8%	1.7%	0.7%	0.7%	0.0%
3	Brynmawr Town Centre	3.9%	2.7%	5.2%	11.1%	6.6%	1.3%	1.0%
3	Zone 3 - Other	2.8%	3.0%	6.4%	5.6%	3.0%	0.6%	0.0%
4	Blaina Town Centre	1.0%	0.0%	1.3%	2.8%	5.1%	0.0%	0.0%
5	Abertillery Town Centre	5.1%	0.0%	0.0%	2.2%	10.1%	15.9%	0.0%
5	Zone 5 - Other	0.2%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%
6	Tredegar Town Centre	5.8%	1.6%	4.8%	1.2%	0.0%	0.0%	24.0%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	2.4%	5.1%	2.6%	1.7%	0.0%	1.0%	3.5%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	12.1%	11.8%	12.0%	17.1%	11.1%	4.2%	19.9%
Outside	Merthyr Tydfil - Elsewhere	1.3%	1.0%	0.4%	3.5%	0.7%	0.3%	2.0%
Outside	Cwmbran Town Centre	2.8%	3.5%	1.6%	0.0%	2.1%	6.8%	0.0%
Outside	Cwmbran - Elsewhere	3.1%	2.0%	0.0%	4.4%	3.5%	7.3%	0.0%
Outside	Cardiff City Centre	5.6%	6.2%	4.4%	3.9%	7.0%	4.9%	8.2%
Outside	Cardiff - Elsewhere	8.4%	6.8%	6.1%	8.2%	11.2%	10.2%	8.5%
Outside	Newport City Centre	0.8%	2.0%	0.0%	0.0%	0.7%	1.3%	0.5%
Outside	Newport - Elsewhere	3.1%	7.3%	1.3%	2.7%	5.8%	3.2%	0.5%
Outside	Other	5.3%	3.6%	6.6%	8.6%	4.8%	5.7%	2.5%
	Internet / delivered	20.2%	14.9%	24.6%	14.3%	17.1%	27.6%	15.8%
	Home catalogue	0.7%	1.0%	0.0%	1.6%	1.3%	0.6%	0.0%
	TV / Interactive shopping	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	(Don't know)							
	(Don't do this type of shopping)							
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.20C: Furniture, carpets & floor coverings Market Share (Q19) - exc SFT and null responses and rebased to 100%

Zone	Furniture / Carpets & Floor Coverings Goods Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	17.1%	32.6%	27.6%	11.4%	6.2%	8.1%	13.7%
1	Tesco, North West Approach, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	0.7%	0.0%	1.1%	0.0%	1.7%	0.0%	1.8%
1	Zone 1 - Other	0.7%	0.0%	0.0%	0.0%	1.6%	2.2%	0.6%
2	Morrisons, Beaufort Road, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.1%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	0.8%	0.0%	1.1%	2.0%	0.9%	0.9%	0.0%
3	Brynmawr Town Centre	5.0%	3.2%	6.9%	13.2%	8.1%	1.8%	1.2%
3	Zone 3 - Other	3.6%	3.6%	8.5%	6.6%	3.7%	0.8%	0.0%
4	Blaina Town Centre	1.3%	0.0%	1.8%	3.3%	6.2%	0.0%	0.0%
5	Abertillery Town Centre	6.4%	0.0%	0.0%	2.6%	12.3%	22.1%	0.0%
5	Zone 5 - Other	0.3%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%
6	Tredegar Town Centre	7.3%	1.9%	6.4%	1.4%	0.0%	0.0%	28.5%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	3.1%	6.1%	3.5%	2.0%	0.0%	1.4%	4.1%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	15.3%	14.1%	15.9%	20.3%	13.6%	5.8%	23.7%
Outside	Merthyr Tydfil - Elsewhere	1.6%	1.2%	0.6%	4.2%	0.9%	0.5%	2.4%
Outside	Cwmbran Town Centre	3.5%	4.2%	2.2%	0.0%	2.5%	9.5%	0.0%
Outside	Cwmbran - Elsewhere	3.9%	2.4%	0.0%	5.2%	4.2%	10.2%	0.0%
Outside	Cardiff City Centre	7.1%	7.4%	5.9%	4.6%	8.6%	6.8%	9.7%
Outside	Cardiff - Elsewhere	10.6%	8.0%	8.1%	9.8%	13.8%	14.3%	10.1%
Outside	Newport City Centre	1.0%	2.4%	0.0%	0.0%	0.9%	1.9%	0.6%
Outside	Newport - Elsewhere	3.9%	8.7%	1.7%	3.2%	7.1%	4.5%	0.6%
Outside	Other	6.7%	4.2%	8.8%	10.2%	5.9%	8.0%	3.0%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.21A: Items for the House Market Share (Q21)

Zone	Items for the House Goods Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	10.0%	18.9%	15.7%	5.5%	6.1%	6.6%	6.1%
1	Tesco, North West Approach, Ebbw Vale	5.6%	8.4%	6.3%	4.8%	1.4%	2.0%	8.3%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	5.8%	4.0%	11.2%	6.6%	5.3%	4.1%	4.6%
1	Zone 1 - Other	0.2%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	3.2%	4.6%	7.0%	1.8%	0.0%	0.0%	4.7%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	7.6%	6.4%	12.1%	1.1%	3.8%	9.2%	9.5%
2	Zone 2 - Other	0.3%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	9.6%	2.5%	13.5%	26.2%	16.9%	9.0%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	2.7%	0.9%	0.0%	4.6%	2.3%	6.3%	1.4%
3	Brynmawr Town Centre	0.4%	0.0%	0.0%	2.4%	0.8%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	2.2%	0.0%	0.0%	0.0%	1.4%	9.4%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	2.1%	0.0%	0.6%	0.0%	0.0%	0.0%	9.0%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	2.8%	2.0%	4.3%	2.5%	3.8%	0.0%	5.1%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	13.4%	9.7%	16.6%	19.7%	6.9%	4.2%	21.2%
Outside	Merthyr Tydfil - Elsewhere	3.9%	3.0%	3.8%	2.5%	3.2%	0.4%	9.1%
Outside	Cwmbran Town Centre	4.7%	3.0%	0.6%	3.7%	7.1%	13.9%	0.0%
Outside	Cwmbran - Elsewhere	3.3%	1.5%	0.0%	0.6%	5.3%	11.9%	0.0%
Outside	Cardiff City Centre	4.6%	2.5%	4.4%	2.4%	0.0%	7.6%	6.5%
Outside	Cardiff - Elsewhere	3.4%	2.5%	2.3%	1.7%	9.4%	5.5%	1.9%
Outside	Newport City Centre	1.0%	1.0%	0.0%	0.0%	5.4%	2.0%	0.0%
Outside	Newport - Elsewhere	7.5%	6.5%	5.6%	8.7%	8.2%	13.1%	3.2%
Outside	Other	5.5%	0.5%	2.6%	4.8%	6.9%	12.8%	4.6%
	Internet / delivered	32.5%	27.2%	33.8%	26.4%	32.0%	36.6%	36.2%
	Home catalogue	1.3%	0.9%	0.6%	1.8%	3.9%	0.8%	1.4%
	TV / Interactive shopping	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	(Don't know)	2.3%	3.9%	1.7%	2.9%	0.0%	0.8%	3.2%
	(Don’t do this type of shopping)	14.8%	22.4%	8.7%	17.1%	15.3%	7.4%	18.4%
	Total	150.7%	132.5%	152.4%	149.7%	145.5%	163.6%	154.3%

Table A8.21B: Items for the House Market Share (Q21) - exc null responses and rebased to 100%

Zone	Items for the House Goods Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	7.5%	17.8%	11.1%	4.2%	4.7%	4.2%	4.6%
1	Tesco, North West Approach, Ebbw Vale	4.2%	7.9%	4.5%	3.7%	1.1%	1.3%	6.2%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	4.3%	3.8%	7.9%	5.1%	4.1%	2.6%	3.5%
1	Zone 1 - Other	0.1%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	2.4%	4.3%	4.9%	1.4%	0.0%	0.0%	3.5%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	5.7%	6.0%	8.6%	0.9%	2.9%	5.9%	7.1%
2	Zone 2 - Other	0.2%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	7.2%	2.4%	9.5%	20.2%	13.0%	5.8%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	2.0%	0.9%	0.0%	3.5%	1.7%	4.1%	1.1%
3	Brynmawr Town Centre	0.3%	0.0%	0.0%	1.8%	0.6%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	1.6%	0.0%	0.0%	0.0%	1.1%	6.1%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	1.5%	0.0%	0.4%	0.0%	0.0%	0.0%	6.7%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	2.1%	1.9%	3.0%	1.9%	3.0%	0.0%	3.8%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	10.0%	9.2%	11.7%	15.2%	5.3%	2.7%	16.0%
Outside	Merthyr Tydfil - Elsewhere	2.9%	2.9%	2.6%	1.9%	2.5%	0.3%	6.9%
Outside	Cwmbran Town Centre	3.5%	2.8%	0.4%	2.9%	5.5%	8.9%	0.0%
Outside	Cwmbran - Elsewhere	2.5%	1.4%	0.0%	0.5%	4.1%	7.6%	0.0%
Outside	Cardiff City Centre	3.4%	2.3%	3.1%	1.8%	0.0%	4.9%	4.9%
Outside	Cardiff - Elsewhere	2.5%	2.4%	1.6%	1.3%	7.2%	3.5%	1.5%
Outside	Newport City Centre	0.8%	0.9%	0.0%	0.0%	4.2%	1.3%	0.0%
Outside	Newport - Elsewhere	5.6%	6.2%	3.9%	6.7%	6.3%	8.5%	2.4%
Outside	Other	4.1%	0.5%	1.8%	3.7%	5.3%	8.2%	3.5%
	Internet / delivered	24.3%	25.6%	23.8%	20.3%	24.6%	23.6%	27.3%
	Home catalogue	1.0%	0.9%	0.4%	1.4%	3.0%	0.5%	1.0%
	TV / Interactive shopping	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	(Don't know)							
	(Don’t do this type of shopping)							
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.21C: Items for the House Market Share (Q21) - exc SFT and null responses and rebased to 100%

Zone	Items for the House Goods Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	10.0%	24.2%	14.6%	5.4%	6.5%	5.6%	6.4%
1	Tesco, North West Approach, Ebbw Vale	5.6%	10.8%	5.9%	4.7%	1.5%	1.7%	8.7%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	5.8%	5.1%	10.4%	6.5%	5.6%	3.5%	4.9%
1	Zone 1 - Other	0.2%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	3.2%	5.9%	6.5%	1.7%	0.0%	0.0%	4.9%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	7.6%	8.2%	11.3%	1.1%	4.1%	7.8%	10.0%
2	Zone 2 - Other	0.3%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	9.7%	3.3%	12.6%	25.8%	17.9%	7.6%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	2.7%	1.2%	0.0%	4.5%	2.4%	5.4%	1.5%
3	Brynmawr Town Centre	0.4%	0.0%	0.0%	2.4%	0.8%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	2.2%	0.0%	0.0%	0.0%	1.5%	8.0%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	2.1%	0.0%	0.5%	0.0%	0.0%	0.0%	9.4%
6	Zone 6 Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	2.8%	2.5%	4.0%	2.4%	4.1%	0.0%	5.4%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	13.4%	12.5%	15.4%	19.4%	7.3%	3.5%	22.3%
Outside	Merthyr Tydfil - Elsewhere	3.9%	3.9%	3.5%	2.5%	3.4%	0.4%	9.6%
Outside	Cwmbran Town Centre	4.7%	3.9%	0.5%	3.7%	7.6%	11.8%	0.0%
Outside	Cwmbran - Elsewhere	3.3%	1.9%	0.0%	0.6%	5.6%	10.1%	0.0%
Outside	Cardiff City Centre	4.6%	3.2%	4.1%	2.3%	0.0%	6.4%	6.8%
Outside	Cardiff - Elsewhere	3.4%	3.2%	2.1%	1.7%	10.0%	4.6%	2.0%
Outside	Newport City Centre	1.0%	1.2%	0.0%	0.0%	5.8%	1.7%	0.0%
Outside	Newport - Elsewhere	7.5%	8.4%	5.2%	8.5%	8.7%	11.1%	3.3%
Outside	Other	5.5%	0.7%	2.4%	4.8%	7.3%	10.8%	4.9%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.22A: Personal Items Market Share (Q23)

Zone	Personal Items Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	11.7%	19.0%	24.6%	7.9%	5.5%	4.4%	8.3%
1	Tesco, North West Approach, Ebbw Vale	0.6%	0.5%	1.0%	0.0%	0.0%	0.0%	1.4%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	1.2%	1.0%	2.6%	0.6%	0.0%	0.0%	2.3%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.6%	1.0%	1.0%	0.0%	0.0%	0.0%	0.9%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	0.5%	1.0%	0.0%	1.9%	0.8%	0.0%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Brynmawr Town Centre	3.5%	0.0%	0.0%	19.8%	6.0%	0.8%	0.0%
3	Zone 3 - Other	0.1%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	5.1%	2.4%	2.6%	0.0%	2.4%	0.0%	18.7%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	4.1%	1.9%	5.4%	4.0%	1.6%	0.0%	10.1%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	4.3%	3.6%	5.5%	1.9%	0.0%	4.1%	7.3%
Outside	Merthyr Tydfil - Elsewhere	0.6%	0.5%	0.0%	0.0%	0.0%	0.0%	2.3%
Outside	Cwmbran Town Centre	10.7%	4.8%	5.5%	10.7%	11.5%	29.8%	0.0%
Outside	Cwmbran - Elsewhere	1.1%	0.0%	0.6%	0.0%	0.0%	4.5%	0.0%
Outside	Cardiff City Centre	11.2%	10.6%	15.2%	5.2%	10.4%	10.8%	13.5%
Outside	Cardiff - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Newport City Centre	1.1%	1.9%	0.0%	0.6%	0.8%	2.8%	0.0%
Outside	Newport - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Other	6.4%	1.5%	10.3%	8.6%	5.3%	7.7%	5.1%
	Internet / delivered	25.0%	25.1%	34.9%	19.8%	23.8%	29.1%	17.8%
	TV / Interactive shopping	0.8%	1.0%	0.0%	0.6%	3.2%	0.4%	0.9%
	Home catalogue	0.6%	0.0%	0.0%	0.0%	0.0%	2.0%	0.9%
	(Don't know)	1.1%	2.0%	0.0%	3.0%	0.0%	0.0%	1.4%
	(Don’t do this type of shopping)	35.5%	37.3%	26.9%	38.5%	45.1%	32.6%	37.8%
	Total	126.0%	115.1%	136.0%	123.2%	116.4%	130.0%	128.8%

Table A8.22B: Personal Items Market Share (Q23) - exc null responses and rebased to 100%

Zone	Personal Items Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	13.1%	25.0%	22.5%	9.7%	7.8%	4.6%	9.3%
1	Tesco, North West Approach, Ebbw Vale	0.6%	0.7%	1.0%	0.0%	0.0%	0.0%	1.6%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	1.3%	1.3%	2.4%	0.8%	0.0%	0.0%	2.6%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.6%	1.4%	1.0%	0.0%	0.0%	0.0%	1.0%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	0.6%	1.3%	0.0%	2.3%	1.1%	0.0%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Brynmawr Town Centre	4.0%	0.0%	0.0%	24.2%	8.4%	0.8%	0.0%
3	Zone 3 - Other	0.1%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	5.8%	3.2%	2.4%	0.0%	3.4%	0.0%	20.8%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	4.6%	2.5%	4.9%	4.9%	2.2%	0.0%	11.3%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	4.8%	4.7%	5.0%	2.3%	0.0%	4.2%	8.2%
Outside	Merthyr Tydfil - Elsewhere	0.7%	0.7%	0.0%	0.0%	0.0%	0.0%	2.5%
Outside	Cwmbran Town Centre	12.0%	6.4%	5.0%	13.1%	16.1%	30.6%	0.0%
Outside	Cwmbran - Elsewhere	1.2%	0.0%	0.5%	0.0%	0.0%	4.7%	0.0%
Outside	Cardiff City Centre	12.5%	14.0%	13.9%	6.4%	14.6%	11.1%	15.1%
Outside	Cardiff - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Newport City Centre	1.3%	2.6%	0.0%	0.8%	1.1%	2.9%	0.0%
Outside	Newport - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Other	7.1%	2.0%	9.5%	10.5%	7.4%	7.9%	5.7%
	Internet / delivered	28.0%	33.1%	31.9%	24.3%	33.4%	29.9%	19.9%
	TV / Interactive shopping	0.9%	1.3%	0.0%	0.8%	4.5%	0.4%	1.0%
	Home catalogue	0.7%	0.0%	0.0%	0.0%	0.0%	2.0%	1.0%
	(Don't know)							
	(Don’t do this type of shopping)							
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.22C: Personal Items Market Share (Q23) - exc SFT and null responses and rebased to 100%

Zone	Personal Items Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	18.6%	38.1%	33.1%	12.9%	12.5%	6.7%	11.9%
1	Tesco, North West Approach, Ebbw Vale	0.9%	1.0%	1.4%	0.0%	0.0%	0.0%	2.1%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	1.9%	2.0%	3.5%	1.0%	0.0%	0.0%	3.3%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.9%	2.1%	1.4%	0.0%	0.0%	0.0%	1.3%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	0.8%	2.0%	0.0%	3.1%	1.8%	0.0%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Brynmawr Town Centre	5.6%	0.0%	0.0%	32.4%	13.6%	1.2%	0.0%
3	Zone 3 - Other	0.1%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	8.2%	4.9%	3.5%	0.0%	5.4%	0.0%	26.6%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	6.6%	3.8%	7.2%	6.5%	3.6%	0.0%	14.5%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	6.8%	7.2%	7.3%	3.1%	0.0%	6.2%	10.4%
Outside	Merthyr Tydfil - Elsewhere	1.0%	1.0%	0.0%	0.0%	0.0%	0.0%	3.2%
Outside	Cwmbran Town Centre	17.0%	9.7%	7.4%	17.5%	26.0%	45.3%	0.0%
Outside	Cwmbran - Elsewhere	1.7%	0.0%	0.8%	0.0%	0.0%	6.9%	0.0%
Outside	Cardiff City Centre	17.8%	21.3%	20.5%	8.6%	23.5%	16.4%	19.3%
Outside	Cardiff - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Newport City Centre	1.8%	3.9%	0.0%	1.0%	1.8%	4.3%	0.0%
Outside	Newport - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Other	10.1%	3.0%	13.9%	14.0%	11.9%	11.7%	7.3%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.23A: Books and Stationery Market Share (Q25)

Zone	Books & Stationery Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	8.9%	22.6%	13.4%	5.2%	3.8%	3.7%	3.6%
1	Tesco, North West Approach, Ebbw Vale	7.7%	12.0%	8.7%	4.8%	3.8%	4.2%	10.2%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	4.9%	8.4%	9.4%	3.0%	3.8%	2.4%	2.7%
1	Zone 1 - Other	0.1%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	4.8%	5.4%	9.8%	1.8%	0.0%	0.4%	8.5%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.8%	0.0%	4.9%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	7.5%	3.4%	6.1%	19.0%	14.7%	7.5%	1.7%
3	Other Stores, Lakeside Retail Park, Brynmawr	1.88%	0.00%	0.00%	4.67%	0.00%	5.40%	0.00%
3	Brynmawr Town Centre	2.6%	1.6%	0.6%	13.0%	2.4%	0.4%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.5%	0.0%	0.0%	0.0%	6.8%	0.0%	0.0%
5	Abertillery Town Centre	3.3%	0.0%	0.0%	0.0%	4.8%	13.6%	0.0%
5	Zone 5 - Other	0.1%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
6	Tredegar Town Centre	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	14.2%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	1.7%	0.5%	3.1%	1.1%	0.0%	0.0%	4.1%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil - Elsewhere	3.4%	1.0%	5.3%	0.6%	0.0%	0.4%	9.8%
Outside	Cwmbran Town Centre	5.2%	3.4%	3.9%	3.5%	4.7%	13.5%	0.5%
Outside	Cwmbran - Elsewhere	0.6%	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%
Outside	Cardiff City Centre	3.5%	4.5%	3.1%	3.1%	2.9%	4.2%	2.9%
Outside	Cardiff - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Newport City Centre	0.6%	0.0%	0.0%	0.6%	1.5%	1.7%	0.0%
Outside	Newport - Elsewhere	0.2%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
Outside	Other	8.5%	5.5%	13.5%	9.8%	9.1%	11.4%	3.6%
	Internet / delivered	37.3%	34.9%	41.4%	28.2%	36.2%	41.1%	39.1%
	Home catalogue	0.2%	0.0%	0.0%	0.0%	0.8%	0.0%	0.5%
	TV / Interactive shopping	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	(Don't know)	0.2%	0.5%	0.0%	0.6%	0.0%	0.0%	0.0%
	(Don’t do this type of shopping)	24.3%	28.6%	18.7%	27.3%	25.6%	20.2%	26.3%
	Total	131.5%	132.8%	142.9%	126.4%	120.8%	132.9%	127.7%

Table A8.23B: Books and Stationery Market Share (Q25) - exc null responses and rebased to 100%

Zone	Books & Stationery Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	8.3%	21.8%	10.8%	5.3%	4.0%	3.2%	3.6%
1	Tesco, North West Approach, Ebbw Vale	7.2%	11.5%	7.0%	4.9%	4.0%	3.7%	10.1%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	4.5%	8.1%	7.6%	3.0%	4.0%	2.1%	2.7%
1	Zone 1 - Other	0.1%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	4.4%	5.2%	7.9%	1.8%	0.0%	0.4%	8.4%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.7%	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	7.0%	3.3%	4.9%	19.3%	15.4%	6.6%	1.7%
3	Other Stores, Lakeside Retail Park, Brynmawr	1.8%	0.0%	0.0%	4.7%	0.0%	4.8%	0.0%
3	Brynmawr Town Centre	2.4%	1.5%	0.5%	13.2%	2.5%	0.4%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.4%	0.0%	0.0%	0.0%	7.1%	0.0%	0.0%
5	Abertillery Town Centre	3.1%	0.0%	0.0%	0.0%	5.0%	12.1%	0.0%
5	Zone 5 - Other	0.1%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
6	Tredegar Town Centre	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	14.0%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	1.6%	0.5%	2.5%	1.1%	0.0%	0.0%	4.1%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil - Elsewhere	3.2%	1.0%	4.3%	0.6%	0.0%	0.4%	9.7%
Outside	Cwmbran Town Centre	4.8%	3.3%	3.1%	3.6%	5.0%	12.0%	0.5%
Outside	Cwmbran - Elsewhere	0.5%	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%
Outside	Cardiff City Centre	3.3%	4.3%	2.5%	3.1%	3.1%	3.7%	2.9%
Outside	Cardiff - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Newport City Centre	0.5%	0.0%	0.0%	0.6%	1.6%	1.5%	0.0%
Outside	Newport - Elsewhere	0.2%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
Outside	Other	7.9%	5.3%	10.9%	9.9%	9.6%	10.1%	3.5%
	Internet / delivered	34.8%	33.6%	33.4%	28.7%	38.0%	36.4%	38.5%
	Home catalogue	0.2%	0.0%	0.0%	0.0%	0.8%	0.0%	0.5%
	TV / Interactive shopping	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	(Don't know)							
	(Don’t do this type of shopping)							
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.23C: Books and Stationery Market Share (Q25) - exc SFT and null responses and rebased to 100%

Zone	Books & Stationery Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	12.8%	32.8%	16.2%	7.4%	6.5%	5.1%	5.9%
1	Tesco, North West Approach, Ebbw Vale	11.1%	17.4%	10.5%	6.8%	6.6%	5.8%	16.6%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	7.0%	12.3%	11.3%	4.3%	6.5%	3.3%	4.3%
1	Zone 1 - Other	0.1%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	6.8%	7.8%	11.8%	2.5%	0.0%	0.6%	13.7%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	1.1%	0.0%	5.9%	0.0%	0.0%	0.0%	0.0%
2	Zone 2 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Asda, Lakeside Retail Park, Brynmawr	10.7%	4.9%	7.4%	27.1%	25.2%	10.4%	2.8%
3	Other Stores, Lakeside Retail Park, Brynmawr	2.7%	0.0%	0.0%	6.6%	0.0%	7.5%	0.0%
3	Brynmawr Town Centre	3.7%	2.3%	0.7%	18.6%	4.1%	0.6%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.7%	0.0%	0.0%	0.0%	11.7%	0.0%	0.0%
5	Abertillery Town Centre	4.8%	0.0%	0.0%	0.0%	8.2%	19.0%	0.0%
5	Zone 5 - Other	0.1%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%
6	Tredegar Town Centre	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	22.9%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	2.4%	0.8%	3.8%	1.6%	0.0%	0.0%	6.7%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil - Elsewhere	4.9%	1.5%	6.5%	0.9%	0.0%	0.6%	15.9%
Outside	Cwmbran Town Centre	7.4%	5.0%	4.7%	5.0%	8.1%	18.8%	0.8%
Outside	Cwmbran - Elsewhere	0.8%	0.0%	0.0%	0.0%	0.0%	3.6%	0.0%
Outside	Cardiff City Centre	5.1%	6.5%	3.8%	4.4%	5.0%	5.8%	4.7%
Outside	Cardiff - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Newport City Centre	0.8%	0.0%	0.0%	0.9%	2.5%	2.4%	0.0%
Outside	Newport - Elsewhere	0.2%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%
Outside	Other	12.2%	8.0%	16.3%	13.9%	15.6%	15.9%	5.7%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.24A: Household Appliances Market Share (Q27)

Zone	Household Appliance Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	18.7%	21.4%	26.7%	21.2%	13.1%	12.9%	16.7%
1	Tesco, North West Approach, Ebbw Vale	0.9%	2.5%	0.0%	3.0%	0.0%	0.0%	0.0%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	0.3%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.9%	1.5%	1.0%	0.0%	0.0%	1.2%	0.9%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.8%	0.5%	2.3%	0.0%	0.0%	0.0%	1.4%
2	Zone 2 - Other	1.0%	1.0%	1.1%	0.6%	2.3%	0.8%	1.0%
3	Asda, Lakeside Retail Park, Brynmawr	3.6%	1.6%	3.3%	10.9%	9.5%	2.5%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	0.2%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%
3	Brynmawr Town Centre	0.1%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	1.3%	0.0%	0.0%	0.0%	0.0%	5.7%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.8%	0.0%	1.0%	0.0%	0.0%	0.0%	2.8%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	0.3%	0.0%	0.0%	0.0%	0.8%	0.0%	0.9%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	38.4%	36.6%	44.1%	48.0%	33.9%	16.5%	52.4%
Outside	Merthyr Tydfil - Elsewhere	0.6%	0.0%	0.0%	1.8%	0.8%	0.4%	0.9%
Outside	Cwmbran Town Centre	1.6%	0.0%	1.0%	0.6%	0.0%	6.2%	0.0%
Outside	Cwmbran - Elsewhere	9.5%	3.0%	0.0%	7.1%	9.9%	32.9%	0.0%
Outside	Cardiff City Centre	1.5%	2.9%	0.6%	0.0%	0.8%	3.6%	0.0%
Outside	Cardiff - Elsewhere	0.7%	0.0%	0.6%	2.2%	0.0%	0.4%	0.9%
Outside	Newport City Centre	0.3%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%
Outside	Newport - Elsewhere	0.7%	0.0%	0.0%	0.0%	0.0%	3.2%	0.0%
Outside	Other	3.1%	1.0%	1.7%	4.4%	2.9%	7.0%	1.4%
	Internet / delivered	40.5%	38.4%	39.6%	30.6%	35.1%	52.8%	39.0%
	Home catalogue	1.5%	2.9%	1.0%	3.0%	0.8%	1.6%	0.0%
	TV / Interactive shopping	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	(Don't know)	0.8%	0.0%	1.7%	0.0%	1.5%	2.1%	0.0%
	(Don’t do this type of shopping)	9.0%	16.4%	3.3%	8.1%	4.7%	3.8%	13.9%
	Total	137.0%	129.6%	129.0%	144.4%	117.6%	154.8%	132.2%

Table A8.24B: Household Appliances Market Share (Q27) - exc null responses and rebased to 100%

Zone	Household Appliance Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	14.7%	18.9%	21.5%	15.5%	11.7%	8.7%	14.1%
1	Tesco, North West Approach, Ebbw Vale	0.7%	2.2%	0.0%	2.2%	0.0%	0.0%	0.0%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	0.2%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	0.7%	1.3%	0.8%	0.0%	0.0%	0.8%	0.8%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.6%	0.5%	1.8%	0.0%	0.0%	0.0%	1.2%
2	Zone 2 - Other	0.8%	0.9%	0.9%	0.5%	2.0%	0.5%	0.8%
3	Asda, Lakeside Retail Park, Brynmawr	2.9%	1.4%	2.7%	8.0%	8.5%	1.7%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	0.1%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%
3	Brynmawr Town Centre	0.1%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	1.0%	0.0%	0.0%	0.0%	0.0%	3.8%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.6%	0.0%	0.8%	0.0%	0.0%	0.0%	2.4%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	0.2%	0.0%	0.0%	0.0%	0.7%	0.0%	0.8%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	30.2%	32.3%	35.6%	35.2%	30.4%	11.1%	44.3%
Outside	Merthyr Tydfil - Elsewhere	0.5%	0.0%	0.0%	1.3%	0.7%	0.3%	0.8%
Outside	Cwmbran Town Centre	1.3%	0.0%	0.8%	0.5%	0.0%	4.2%	0.0%
Outside	Cwmbran - Elsewhere	7.5%	2.6%	0.0%	5.2%	8.9%	22.1%	0.0%
Outside	Cardiff City Centre	1.2%	2.6%	0.5%	0.0%	0.7%	2.4%	0.0%
Outside	Cardiff - Elsewhere	0.6%	0.0%	0.5%	1.6%	0.0%	0.3%	0.8%
Outside	Newport City Centre	0.2%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%
Outside	Newport - Elsewhere	0.5%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%
Outside	Other	2.5%	0.9%	1.4%	3.2%	2.6%	4.7%	1.2%
	Internet / delivered	31.8%	33.9%	31.9%	22.4%	31.5%	35.4%	33.0%
	Home catalogue	1.2%	2.5%	0.8%	2.2%	0.7%	1.0%	0.0%
	TV / Interactive shopping	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	(Don't know)							
	(Don’t do this type of shopping)							
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.24C: Household Appliances Market Share (Q27) - exc SFT and null responses and rebased to 100%

Zone	Household Appliance Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	22.0%	29.7%	32.0%	20.6%	17.3%	13.7%	21.0%
1	Tesco, North West Approach, Ebbw Vale	1.1%	3.5%	0.0%	2.9%	0.0%	0.0%	0.0%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	0.3%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%
1	Zone 1 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Beaufort Road, Ebbw Vale	1.1%	2.1%	1.3%	0.0%	0.0%	1.3%	1.1%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	0.9%	0.7%	2.7%	0.0%	0.0%	0.0%	1.8%
2	Zone 2 - Other	1.2%	1.4%	1.3%	0.6%	3.0%	0.8%	1.2%
3	Asda, Lakeside Retail Park, Brynmawr	4.3%	2.2%	4.0%	10.6%	12.6%	2.6%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	0.2%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%
3	Brynmawr Town Centre	0.1%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Abertillery Town Centre	1.5%	0.0%	0.0%	0.0%	0.0%	6.0%	0.0%
5	Zone 5 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Tredegar Town Centre	0.9%	0.0%	1.2%	0.0%	0.0%	0.0%	3.6%
6	Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Merthyr Tydfil Town Centre	0.3%	0.0%	0.0%	0.0%	1.0%	0.0%	1.1%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	45.0%	50.8%	52.9%	46.7%	44.9%	17.5%	66.1%
Outside	Merthyr Tydfil - Elsewhere	0.7%	0.0%	0.0%	1.7%	1.0%	0.4%	1.1%
Outside	Cwmbran Town Centre	1.9%	0.0%	1.3%	0.6%	0.0%	6.6%	0.0%
Outside	Cwmbran - Elsewhere	11.2%	4.1%	0.0%	6.9%	13.2%	34.7%	0.0%
Outside	Cardiff City Centre	1.7%	4.1%	0.7%	0.0%	1.0%	3.9%	0.0%
Outside	Cardiff - Elsewhere	0.8%	0.0%	0.7%	2.2%	0.0%	0.4%	1.1%
Outside	Newport City Centre	0.3%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%
Outside	Newport - Elsewhere	0.8%	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%
Outside	Other	3.7%	1.3%	2.0%	4.2%	3.9%	7.4%	1.7%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.25A: DIY, Garden & Pets Market Share (Q29)

Zone	DIY, Garden & Pets Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	18.8%	38.9%	33.0%	6.2%	16.1%	7.7%	12.4%
1	Tesco, North West Approach, Ebbw Vale	0.8%	0.5%	0.6%	0.0%	0.0%	2.4%	0.5%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	0.6%	0.5%	0.0%	0.0%	0.0%	0.4%	1.8%
1	Zone 1 - Other	4.9%	1.0%	7.0%	10.1%	4.4%	0.8%	7.6%
2	Morrisons, Beaufort Road, Ebbw Vale	1.0%	0.0%	1.7%	1.8%	0.0%	0.0%	2.2%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	13.7%	16.0%	23.7%	9.0%	4.5%	13.4%	11.2%
2	Zone 2 - Other	0.3%	0.0%	1.1%	0.0%	0.0%	0.0%	0.5%
3	Asda, Lakeside Retail Park, Brynmawr	1.2%	0.0%	1.7%	2.9%	0.8%	2.0%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	2.3%	0.9%	0.6%	5.8%	3.2%	2.1%	2.3%
3	Brynmawr Town Centre	6.8%	1.6%	6.2%	32.1%	7.8%	0.0%	0.9%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.4%	0.0%	0.0%	1.9%	2.4%	0.0%	0.0%
5	Abertillery Town Centre	6.9%	0.9%	0.0%	2.3%	5.4%	27.2%	0.0%
5	Zone 5 - Other	0.8%	0.0%	0.0%	0.0%	3.7%	2.5%	0.0%
6	Tredegar Town Centre	3.4%	0.0%	2.1%	0.0%	0.0%	0.0%	13.8%
6	Zone 6 - Other	2.0%	3.9%	0.6%	1.1%	0.8%	0.4%	4.1%
Outside	Merthyr Tydfil Town Centre	0.8%	2.5%	1.0%	0.0%	0.0%	0.0%	0.9%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	33.4%	38.3%	35.4%	38.6%	39.6%	16.0%	39.9%
Outside	Merthyr Tydfil - Elsewhere	1.1%	2.0%	0.6%	1.9%	2.2%	0.0%	1.0%
Outside	Cwmbran Town Centre	1.5%	0.0%	0.0%	0.0%	0.8%	6.6%	0.0%
Outside	Cwmbran - Elsewhere	10.0%	1.0%	2.8%	7.1%	8.6%	34.3%	0.9%
Outside	Cardiff City Centre	0.2%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
Outside	Cardiff - Elsewhere	0.3%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%
Outside	Newport City Centre	0.2%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%
Outside	Newport - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Other	4.4%	0.0%	4.4%	7.4%	10.0%	7.9%	1.0%
	Internet / delivered	10.7%	8.2%	6.4%	10.0%	11.6%	17.4%	9.5%
	Home catalogue	0.3%	0.0%	0.0%	0.0%	1.6%	0.4%	0.5%
	TV / Interactive shopping	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	(Don't know)	0.5%	0.5%	0.0%	0.0%	0.8%	1.7%	0.0%
	(Don't do this type of shopping)	16.9%	19.5%	17.5%	13.4%	21.8%	9.1%	22.9%
	Total	144.3%	136.3%	147.3%	151.4%	146.0%	154.3%	133.7%

Table A8.25B: DIY, Garden & Pets Market Share (Q29) - exc null responses and rebased to 100%

Zone	DIY, Garden & Pets Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	14.8%	33.5%	25.4%	4.5%	13.1%	5.4%	11.2%
1	Tesco, North West Approach, Ebbw Vale	0.6%	0.4%	0.4%	0.0%	0.0%	1.7%	0.4%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	0.5%	0.4%	0.0%	0.0%	0.0%	0.3%	1.6%
1	Zone 1 - Other	3.9%	0.8%	5.4%	7.3%	3.6%	0.5%	6.8%
2	Morrisons, Beaufort Road, Ebbw Vale	0.8%	0.0%	1.3%	1.3%	0.0%	0.0%	2.0%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	10.8%	13.7%	18.2%	6.5%	3.6%	9.4%	10.1%
2	Zone 2 - Other	0.2%	0.0%	0.9%	0.0%	0.0%	0.0%	0.4%
3	Asda, Lakeside Retail Park, Brynmawr	0.9%	0.0%	1.3%	2.1%	0.6%	1.4%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	1.8%	0.8%	0.4%	4.2%	2.6%	1.4%	2.1%
3	Brynmawr Town Centre	5.3%	1.4%	4.8%	23.2%	6.3%	0.0%	0.8%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.4%	0.0%	0.0%	1.4%	1.9%	0.0%	0.0%
5	Abertillery Town Centre	5.4%	0.8%	0.0%	1.7%	4.4%	19.0%	0.0%
5	Zone 5 - Other	0.6%	0.0%	0.0%	0.0%	3.0%	1.8%	0.0%
6	Tredegar Town Centre	2.7%	0.0%	1.6%	0.0%	0.0%	0.0%	12.4%
6	Zone 6 - Other	1.6%	3.4%	0.4%	0.8%	0.6%	0.3%	3.7%
Outside	Merthyr Tydfil Town Centre	0.6%	2.2%	0.8%	0.0%	0.0%	0.0%	0.8%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	26.4%	33.0%	27.3%	27.9%	32.1%	11.2%	36.0%
Outside	Merthyr Tydfil - Elsewhere	0.9%	1.7%	0.4%	1.4%	1.8%	0.0%	0.9%
Outside	Cwmbran Town Centre	1.2%	0.0%	0.0%	0.0%	0.6%	4.6%	0.0%
Outside	Cwmbran - Elsewhere	7.9%	0.8%	2.1%	5.1%	7.0%	23.9%	0.8%
Outside	Cardiff City Centre	0.1%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
Outside	Cardiff - Elsewhere	0.2%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%
Outside	Newport City Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%
Outside	Newport - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Other	3.5%	0.0%	3.4%	5.4%	8.1%	5.5%	0.9%
	Internet / delivered	8.5%	7.1%	4.9%	7.2%	9.4%	12.1%	8.6%
	Home catalogue	0.2%	0.0%	0.0%	0.0%	1.3%	0.3%	0.4%
	TV / Interactive shopping	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	(Don't know)							
	(Don't do this type of shopping)							
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.25C: DIY, Garden & Pets Market Share (Q29) - exc SFT and null responses and rebased to 100%

Zone	DIY, Garden & Pets Location	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	16.2%	36.0%	26.7%	4.8%	14.6%	6.1%	12.3%
1	Tesco, North West Approach, Ebbw Vale	0.7%	0.5%	0.5%	0.0%	0.0%	1.9%	0.5%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	0.5%	0.5%	0.0%	0.0%	0.0%	0.3%	1.7%
1	Zone 1 - Other	4.2%	0.9%	5.7%	7.9%	4.0%	0.6%	7.5%
2	Morrisons, Beaufort Road, Ebbw Vale	0.9%	0.0%	1.4%	1.4%	0.0%	0.0%	2.2%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	11.9%	14.8%	19.2%	7.0%	4.1%	10.7%	11.1%
2	Zone 2 - Other	0.2%	0.0%	0.9%	0.0%	0.0%	0.0%	0.5%
3	Asda, Lakeside Retail Park, Brynmawr	1.0%	0.0%	1.4%	2.3%	0.7%	1.6%	0.0%
3	Other Stores, Lakeside Retail Park, Brynmawr	2.0%	0.9%	0.5%	4.5%	2.9%	1.6%	2.3%
3	Brynmawr Town Centre	5.8%	1.5%	5.0%	25.0%	7.1%	0.0%	0.9%
3	Zone 3 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Blaina Town Centre	0.4%	0.0%	0.0%	1.5%	2.2%	0.0%	0.0%
5	Abertillery Town Centre	5.9%	0.9%	0.0%	1.8%	4.9%	21.6%	0.0%
5	Zone 5 - Other	0.7%	0.0%	0.0%	0.0%	3.3%	2.0%	0.0%
6	Tredegar Town Centre	2.9%	0.0%	1.7%	0.0%	0.0%	0.0%	13.7%
6	Zone 6 - Other	1.8%	3.6%	0.5%	0.9%	0.7%	0.3%	4.1%
Outside	Merthyr Tydfil Town Centre	0.7%	2.3%	0.8%	0.0%	0.0%	0.0%	0.9%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	28.9%	35.5%	28.7%	30.1%	35.9%	12.8%	39.5%
Outside	Merthyr Tydfil - Elsewhere	0.9%	1.8%	0.5%	1.5%	2.0%	0.0%	1.0%
Outside	Cwmbran Town Centre	1.3%	0.0%	0.0%	0.0%	0.7%	5.2%	0.0%
Outside	Cwmbran - Elsewhere	8.6%	0.9%	2.2%	5.5%	7.8%	27.3%	0.9%
Outside	Cardiff City Centre	0.1%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%
Outside	Cardiff - Elsewhere	0.2%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%
Outside	Newport City Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%
Outside	Newport - Elsewhere	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside	Other	3.8%	0.0%	3.6%	5.8%	9.1%	6.3%	1.0%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A8.26: Overall Comparison Market Shares

Zone	Overall Comparison Market Share	Total	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar
1	Ebbw Vale Town Centre	14.6%	32.4%	23.3%	8.8%	7.9%	6.1%	9.6%
1	Tesco, North West Approach, Ebbw Vale	2.5%	4.7%	2.7%	2.0%	1.1%	1.5%	3.0%
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	5.1%	6.9%	7.1%	3.6%	4.3%	3.6%	4.9%
1	Zone 1 - Other	0.7%	1.2%	0.8%	0.8%	0.6%	0.2%	0.8%
2	Morrisons, Beaufort Road, Ebbw Vale	1.6%	1.4%	3.4%	1.2%	0.1%	0.2%	2.6%
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	2.2%	2.9%	3.8%	0.9%	0.9%	1.9%	2.0%
2	Zone 2 - Other	0.3%	0.1%	0.7%	0.3%	0.3%	0.0%	0.3%
3	Asda, Lakeside Retail Park, Brynmawr	4.5%	1.7%	4.0%	11.1%	10.9%	4.3%	0.3%
3	Other Stores, Lakeside Retail Park, Brynmawr	2.3%	0.8%	1.0%	6.1%	4.5%	2.7%	0.5%
3	Brynmawr Town Centre	2.8%	0.5%	1.5%	13.6%	4.5%	0.3%	0.2%
3	Zone 3 - Other	0.3%	0.3%	0.7%	0.7%	0.3%	0.1%	0.0%
4	Blaina Town Centre	0.6%	0.0%	0.1%	0.9%	5.8%	0.0%	0.0%
5	Abertillery Town Centre	3.8%	0.1%	0.0%	0.5%	3.3%	14.6%	0.0%
5	Zone 5 - Other	0.2%	0.0%	0.0%	0.0%	0.3%	0.8%	0.0%
6	Tredegar Town Centre	3.8%	0.5%	1.1%	0.2%	0.3%	0.1%	17.5%
6	Zone 6 - Other	0.2%	0.4%	0.0%	0.1%	0.1%	0.0%	0.4%
Outside	Merthyr Tydfil Town Centre	2.0%	1.7%	2.5%	1.2%	1.0%	0.4%	4.4%
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	20.8%	22.8%	25.3%	21.4%	16.8%	5.4%	32.0%
Outside	Merthyr Tydfil - Elsewhere	1.5%	0.7%	2.0%	1.0%	0.9%	0.3%	3.8%
Outside	Cwmbran Town Centre	9.1%	5.0%	4.6%	9.0%	11.7%	21.7%	1.9%
Outside	Cwmbran - Elsewhere	3.7%	1.3%	0.6%	2.9%	4.4%	11.6%	0.1%
Outside	Cardiff City Centre	7.3%	7.3%	7.2%	4.2%	7.7%	6.7%	10.4%
Outside	Cardiff - Elsewhere	1.3%	1.1%	0.9%	1.1%	2.0%	2.0%	1.1%
Outside	Newport City Centre	1.2%	0.7%	1.1%	1.1%	2.1%	2.4%	0.1%
Outside	Newport - Elsewhere	1.9%	2.7%	1.4%	1.4%	1.8%	3.2%	0.3%
Outside	Other	5.7%	2.7%	4.4%	5.8%	6.6%	9.8%	3.8%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Notes

Derived from Tables A8.12 , A8.13, A8.15D, A8.17D - A8.25D

Table A8.27A : Comparison Turnover 2018

Zone	Comparison Turnover	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar	Total from Study Area	Estimated % Inflow from outside Study Area	Total Comparison Turnover (£m)
	Available Comparison Spend 2018 (£m)	**£27.33**	**£23.85**	**£23.14**	**£10.48**	**£30.40**	**£34.14**	**£149.33**		
1	Ebbw Vale Town Centre	£8.85	£5.56	£2.05	£0.82	£1.86	£3.29	£22.42	5%	£23.61
1	Tesco, North West Approach, Ebbw Vale	£1.29	£0.63	£0.46	£0.11	£0.44	£1.02	£3.96	5%	£4.17
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	£1.90	£1.69	£0.84	£0.45	£1.11	£1.68	£7.66	50%	£15.33
1	Zone 1 - Other	£0.33	£0.18	£0.18	£0.06	£0.07	£0.28	£1.11	0%	£1.11
2	Morrisons, Beaufort Road, Ebbw Vale	£0.39	£0.80	£0.27	£0.01	£0.07	£0.88	£2.41	5%	£2.54
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	£0.79	£0.92	£0.21	£0.09	£0.56	£0.67	£3.24	5%	£3.41
2	Zone 2 - Other	£0.03	£0.16	£0.08	£0.03	£0.01	£0.09	£0.39	0%	£0.39
3	Asda, Lakeside Retail Park, Brynmawr	£0.47	£0.95	£2.56	£1.14	£1.29	£0.11	£6.52	5%	£6.86
3	Other Stores, Lakeside Retail Park, Brynmawr	£0.21	£0.23	£1.41	£0.47	£0.83	£0.19	£3.35	5%	£3.53
3	Brynmawr Town Centre	£0.13	£0.37	£3.14	£0.47	£0.08	£0.06	£4.26	0%	£4.26
3	Zone 3 - Other	£0.08	£0.17	£0.17	£0.03	£0.03	£0.00	£0.48	0%	£0.48
4	Blaina Town Centre	£0.00	£0.04	£0.22	£0.61	£0.01	£0.00	£0.87	0%	£0.87
5	Abertillery Town Centre	£0.02	£0.00	£0.12	£0.34	£4.44	£0.00	£4.93	5%	£5.19
5	Zone 5 - Other	£0.00	£0.00	£0.00	£0.04	£0.24	£0.00	£0.27	0%	£0.27
6	Tredegar Town Centre	£0.15	£0.26	£0.05	£0.03	£0.02	£5.96	£6.48	5%	£6.82
6	Zone 6 - Other	£0.10	£0.01	£0.02	£0.01	£0.01	£0.14	£0.30	0%	£0.30
	Total within Study Area	£14.73	£11.97	£11.78	£4.72	£11.10	£14.38	£68.68		
Outside	Merthyr Tydfil Town Centre	£0.46	£0.60	£0.27	£0.10	£0.12	£1.49	£3.04		
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	£6.22	£6.02	£4.96	£1.76	£1.65	£10.92	£31.54		
Outside	Merthyr Tydfil - Elsewhere	£0.20	£0.47	£0.23	£0.10	£0.08	£1.31	£2.39		
Outside	Cwmbran Town Centre	£1.37	£1.09	£2.07	£1.23	£6.58	£0.64	£12.98		
Outside	Cwmbran - Elsewhere	£0.36	£0.13	£0.67	£0.46	£3.53	£0.03	£5.18		
Outside	Cardiff City Centre	£2.01	£1.72	£0.96	£0.81	£2.04	£3.56	£11.10		
Outside	Cardiff - Elsewhere	£0.30	£0.20	£0.26	£0.21	£0.60	£0.36	£1.94		
Outside	Newport City Centre	£0.20	£0.25	£0.25	£0.22	£0.74	£0.04	£1.70		
Outside	Newport - Elsewhere	£0.73	£0.32	£0.33	£0.19	£0.98	£0.10	£2.66		
Outside	Other	£0.74	£1.05	£1.35	£0.69	£2.99	£1.31	£8.13		
	Total	£27.33	£23.85	£23.14	£10.48	£30.40	£34.14	£149.33		

Table A8.27B : Comparison Turnover 2020

Zone	Comparison Turnover	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar	Total from Study Area	Estimated % Inflow from outside Study Area	Total Comparison Turnover (£m)
	Available Comparison Spend 2020 (£m)	**£24.15**	**£21.16**	**£20.40**	**£9.24**	**£26.81**	**£30.14**	**£131.90**		
1	Ebbw Vale Town Centre	£7.82	£4.93	£1.80	£0.73	£1.64	£2.90	£19.83	5%	£20.87
1	Tesco, North West Approach, Ebbw Vale	£1.14	£0.56	£0.40	£0.10	£0.39	£0.90	£3.50	5%	£3.68
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	£1.68	£1.50	£0.74	£0.40	£0.98	£1.48	£6.77	50%	£13.55
1	Zone 1 - Other	£0.29	£0.16	£0.16	£0.05	£0.07	£0.25	£0.98	0%	£0.98
2	Morrisons, Beaufort Road, Ebbw Vale	£0.34	£0.71	£0.23	£0.01	£0.06	£0.78	£2.13	5%	£2.25
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	£0.70	£0.81	£0.18	£0.08	£0.50	£0.59	£2.87	5%	£3.02
2	Zone 2 - Other	£0.03	£0.14	£0.07	£0.02	£0.01	£0.08	£0.35	0%	£0.35
3	Asda, Lakeside Retail Park, Brynmawr	£0.41	£0.84	£2.26	£1.00	£1.14	£0.09	£5.75	5%	£6.06
3	Other Stores, Lakeside Retail Park, Brynmawr	£0.19	£0.21	£1.25	£0.42	£0.73	£0.16	£2.96	5%	£3.11
3	Brynmawr Town Centre	£0.12	£0.33	£2.77	£0.42	£0.07	£0.06	£3.76	0%	£3.76
3	Zone 3 - Other	£0.07	£0.15	£0.15	£0.03	£0.03	£0.00	£0.43	0%	£0.43
4	Blaina Town Centre	£0.00	£0.03	£0.19	£0.54	£0.01	£0.00	£0.77	0%	£0.77
5	Abertillery Town Centre	£0.02	£0.00	£0.11	£0.30	£3.92	£0.00	£4.35	5%	£4.58
5	Zone 5 - Other	£0.00	£0.00	£0.00	£0.03	£0.21	£0.00	£0.24	0%	£0.24
6	Tredegar Town Centre	£0.13	£0.23	£0.05	£0.03	£0.02	£5.26	£5.72	5%	£6.02
6	Zone 6 - Other	£0.09	£0.01	£0.02	£0.01	£0.01	£0.13	£0.26	0%	£0.26
	Total within Study Area	£13.02	£10.62	£10.38	£4.16	£9.79	£12.69	£60.67		
Outside	Merthyr Tydfil Town Centre	£0.41	£0.53	£0.24	£0.09	£0.10	£1.32	£2.68		
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	£5.50	£5.34	£4.37	£1.55	£1.45	£9.64	£27.86		
Outside	Merthyr Tydfil - Elsewhere	£0.18	£0.42	£0.20	£0.09	£0.07	£1.16	£2.11		
Outside	Cwmbran Town Centre	£1.21	£0.97	£1.83	£1.08	£5.80	£0.56	£11.46		
Outside	Cwmbran - Elsewhere	£0.32	£0.12	£0.59	£0.40	£3.11	£0.03	£4.57		
Outside	Cardiff City Centre	£1.77	£1.53	£0.85	£0.71	£1.80	£3.14	£9.81		
Outside	Cardiff - Elsewhere	£0.26	£0.18	£0.23	£0.19	£0.53	£0.32	£1.71		
Outside	Newport City Centre	£0.18	£0.23	£0.22	£0.20	£0.65	£0.03	£1.50		
Outside	Newport - Elsewhere	£0.65	£0.29	£0.29	£0.17	£0.87	£0.09	£2.35		
Outside	Other	£0.65	£0.93	£1.19	£0.61	£2.64	£1.16	£7.18		
	Total	£24.15	£21.16	£20.40	£9.24	£26.81	£30.14	£131.90		

Table A8.27C : Comparison Turnover 2025

Zone	Comparison Turnover	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar	Total from Study Area	Estimated % Inflow from outside Study Area	Total Comparison Turnover (£m)
	Available Comparison Spend 2025 (£m)	**£28.60**	**£24.89**	**£24.11**	**£10.89**	**£31.59**	**£35.53**	**£155.60**		
1	Ebbw Vale Town Centre	£9.26	£5.80	£2.13	£0.85	£1.94	£3.42	£23.40	5%	£24.64
1	Tesco, North West Approach, Ebbw Vale	£1.35	£0.66	£0.48	£0.12	£0.46	£1.07	£4.13	5%	£4.35
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	£1.99	£1.76	£0.88	£0.47	£1.15	£1.75	£7.99	50%	£15.98
1	Zone 1 - Other	£0.34	£0.19	£0.19	£0.06	£0.08	£0.29	£1.15	0%	£1.15
2	Morrisons, Beaufort Road, Ebbw Vale	£0.40	£0.84	£0.28	£0.01	£0.07	£0.92	£2.52	5%	£2.65
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	£0.82	£0.96	£0.21	£0.10	£0.59	£0.70	£3.38	5%	£3.56
2	Zone 2 - Other	£0.03	£0.17	£0.08	£0.03	£0.01	£0.09	£0.41	0%	£0.41
3	Asda, Lakeside Retail Park, Brynmawr	£0.49	£0.99	£2.67	£1.18	£1.35	£0.11	£6.79	5%	£7.14
3	Other Stores, Lakeside Retail Park, Brynmawr	£0.22	£0.25	£1.47	£0.49	£0.87	£0.19	£3.49	5%	£3.67
3	Brynmawr Town Centre	£0.14	£0.38	£3.27	£0.49	£0.09	£0.07	£4.44	0%	£4.44
3	Zone 3 - Other	£0.08	£0.18	£0.18	£0.03	£0.03	£0.00	£0.50	0%	£0.50
4	Blaina Town Centre	£0.00	£0.04	£0.23	£0.63	£0.01	£0.00	£0.91	0%	£0.91
5	Abertillery Town Centre	£0.03	£0.00	£0.13	£0.36	£4.62	£0.00	£5.13	5%	£5.39
5	Zone 5 - Other	£0.00	£0.00	£0.00	£0.04	£0.25	£0.00	£0.28	0%	£0.28
6	Tredegar Town Centre	£0.16	£0.27	£0.05	£0.03	£0.03	£6.20	£6.75	5%	£7.10
6	Zone 6 - Other	£0.11	£0.01	£0.02	£0.01	£0.01	£0.15	£0.31	0%	£0.31
	Total within Study Area	£15.42	£12.49	£12.27	£4.90	£11.53	£14.96	£71.58		
Outside	Merthyr Tydfil Town Centre	£0.48	£0.63	£0.28	£0.10	£0.12	£1.55	£3.16		
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	£6.51	£6.29	£5.17	£1.83	£1.71	£11.36	£32.87		
Outside	Merthyr Tydfil - Elsewhere	£0.21	£0.49	£0.24	£0.10	£0.08	£1.36	£2.49		
Outside	Cwmbran Town Centre	£1.43	£1.14	£2.16	£1.27	£6.84	£0.66	£13.51		
Outside	Cwmbran - Elsewhere	£0.38	£0.14	£0.70	£0.48	£3.67	£0.03	£5.39		
Outside	Cardiff City Centre	£2.10	£1.80	£1.01	£0.84	£2.12	£3.71	£11.57		
Outside	Cardiff - Elsewhere	£0.31	£0.21	£0.27	£0.22	£0.63	£0.37	£2.02		
Outside	Newport City Centre	£0.21	£0.27	£0.26	£0.23	£0.76	£0.04	£1.77		
Outside	Newport - Elsewhere	£0.77	£0.34	£0.34	£0.20	£1.02	£0.11	£2.77		
Outside	Other	£0.77	£1.10	£1.41	£0.71	£3.11	£1.36	£8.46		
	Total	£28.60	£24.89	£24.11	£10.89	£31.59	£35.53	£155.60		

Table A8.27D : Comparison Turnover 2030

Zone	Comparison Turnover	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar	Total from Study Area	Estimated % Inflow from outside Study Area	Total Comparison Turnover (£m)
	Available Comparison Spend 2030 (£m)	**£31.77**	**£27.50**	**£26.77**	**£12.02**	**£34.86**	**£39.28**	**£172.21**		
1	Ebbw Vale Town Centre	£10.29	£6.41	£2.37	£0.94	£2.14	£3.78	£25.93	5%	£27.29
1	Tesco, North West Approach, Ebbw Vale	£1.50	£0.73	£0.53	£0.13	£0.51	£1.18	£4.57	5%	£4.81
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	£2.21	£1.95	£0.97	£0.52	£1.27	£1.93	£8.85	50%	£17.69
1	Zone 1 - Other	£0.38	£0.21	£0.21	£0.07	£0.09	£0.33	£1.28	0%	£1.28
2	Morrisons, Beaufort Road, Ebbw Vale	£0.45	£0.93	£0.31	£0.01	£0.08	£1.02	£2.78	5%	£2.93
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	£0.92	£1.06	£0.24	£0.11	£0.65	£0.77	£3.74	5%	£3.94
2	Zone 2 - Other	£0.04	£0.19	£0.09	£0.03	£0.01	£0.10	£0.45	0%	£0.45
3	Asda, Lakeside Retail Park, Brynmawr	£0.54	£1.09	£2.97	£1.31	£1.48	£0.12	£7.52	5%	£7.91
3	Other Stores, Lakeside Retail Park, Brynmawr	£0.25	£0.27	£1.64	£0.54	£0.96	£0.21	£3.87	5%	£4.07
3	Brynmawr Town Centre	£0.16	£0.42	£3.64	£0.54	£0.10	£0.07	£4.93	0%	£4.93
3	Zone 3 - Other	£0.09	£0.19	£0.20	£0.04	£0.04	£0.00	£0.56	0%	£0.56
4	Blaina Town Centre	£0.00	£0.04	£0.25	£0.70	£0.01	£0.00	£1.01	0%	£1.01
5	Abertillery Town Centre	£0.03	£0.00	£0.14	£0.39	£5.09	£0.00	£5.66	5%	£5.96
5	Zone 5 - Other	£0.00	£0.00	£0.00	£0.04	£0.27	£0.00	£0.31	0%	£0.31
6	Tredegar Town Centre	£0.17	£0.30	£0.06	£0.04	£0.03	£6.86	£7.46	5%	£7.85
6	Zone 6 - Other	£0.12	£0.01	£0.02	£0.01	£0.01	£0.17	£0.34	0%	£0.34
	Total within Study Area	£17.13	£13.81	£13.63	£5.42	£12.73	£16.54	£79.25		
Outside	Merthyr Tydfil Town Centre	£0.53	£0.69	£0.31	£0.12	£0.14	£1.71	£3.50		
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	£7.24	£6.95	£5.74	£2.02	£1.89	£12.56	£36.40		
Outside	Merthyr Tydfil - Elsewhere	£0.24	£0.54	£0.26	£0.11	£0.09	£1.51	£2.75		
Outside	Cwmbran Town Centre	£1.59	£1.26	£2.40	£1.41	£7.55	£0.73	£14.94		
Outside	Cwmbran - Elsewhere	£0.42	£0.15	£0.78	£0.53	£4.05	£0.04	£5.96		
Outside	Cardiff City Centre	£2.33	£1.99	£1.12	£0.93	£2.34	£4.10	£12.80		
Outside	Cardiff - Elsewhere	£0.34	£0.24	£0.31	£0.24	£0.69	£0.41	£2.23		
Outside	Newport City Centre	£0.24	£0.29	£0.29	£0.25	£0.84	£0.04	£1.96		
Outside	Newport - Elsewhere	£0.85	£0.37	£0.38	£0.22	£1.13	£0.12	£3.07		
Outside	Other	£0.86	£1.21	£1.56	£0.79	£3.43	£1.51	£9.36		
	Total	£31.77	£27.50	£26.77	£12.02	£34.86	£39.28	£172.21		

Table A8.27E : Comparison Turnover 2033

Zone	Comparison Turnover	Zone 1 - Ebbw Vale South	Zone 2 - Ebbw Vale North	Zone 3 - Brynmawr	Zone 4 - Blaina	Zone 5 - Abertillery	Zone 6 - Tredegar	Total from Study Area	Estimated % Inflow from outside Study Area	Total Comparison Turnover (£m)
	Available Comparison Spend 2033 (£m)	**£33.95**	**£29.40**	**£28.62**	**£12.82**	**£37.18**	**£41.91**	**£183.88**		
1	Ebbw Vale Town Centre	£10.99	£6.85	£2.53	£1.01	£2.28	£4.04	£27.69	5%	£29.15
1	Tesco, North West Approach, Ebbw Vale	£1.60	£0.78	£0.57	£0.14	£0.54	£1.26	£4.88	5%	£5.14
1	Festival Park Factory Outlet Shopping Centre, Ebbw Vale	£2.36	£2.08	£1.04	£0.55	£1.36	£2.06	£9.45	50%	£18.89
1	Zone 1 - Other	£0.41	£0.23	£0.22	£0.07	£0.09	£0.35	£1.37	0%	£1.37
2	Morrisons, Beaufort Road, Ebbw Vale	£0.48	£0.99	£0.33	£0.01	£0.08	£1.08	£2.97	5%	£3.13
2	B&M Home Store, Rhyd-Y-Blew, Ebbw Vale	£0.98	£1.13	£0.25	£0.12	£0.69	£0.83	£3.99	5%	£4.20
2	Zone 2 - Other	£0.04	£0.20	£0.10	£0.03	£0.01	£0.11	£0.49	0%	£0.49
3	Asda, Lakeside Retail Park, Brynmawr	£0.58	£1.17	£3.17	£1.39	£1.58	£0.13	£8.03	5%	£8.45
3	Other Stores, Lakeside Retail Park, Brynmawr	£0.26	£0.29	£1.75	£0.58	£1.02	£0.23	£4.13	5%	£4.35
3	Brynmawr Town Centre	£0.17	£0.45	£3.89	£0.58	£0.10	£0.08	£5.27	0%	£5.27
3	Zone 3 - Other	£0.10	£0.21	£0.21	£0.04	£0.04	£0.00	£0.60	0%	£0.60
4	Blaina Town Centre	£0.00	£0.04	£0.27	£0.75	£0.01	£0.00	£1.07	0%	£1.07
5	Abertillery Town Centre	£0.03	£0.00	£0.15	£0.42	£5.43	£0.00	£6.03	5%	£6.35
5	Zone 5 - Other	£0.00	£0.00	£0.00	£0.04	£0.29	£0.00	£0.33	0%	£0.33
6	Tredegar Town Centre	£0.18	£0.32	£0.06	£0.04	£0.03	£7.32	£7.96	5%	£8.38
6	Zone 6 - Other	£0.13	£0.01	£0.02	£0.01	£0.01	£0.18	£0.36	0%	£0.36
	Total within Study Area	£18.30	£14.76	£14.56	£5.78	£13.57	£17.65	£84.63		
Outside	Merthyr Tydfil Town Centre	£0.57	£0.74	£0.33	£0.12	£0.14	£1.83	£3.74		
Outside	Cyfarthfa Retail Park, Swansea Road, Merthyr Tydfil	£7.73	£7.43	£6.14	£2.15	£2.02	£13.41	£38.87		
Outside	Merthyr Tydfil - Elsewhere	£0.25	£0.58	£0.28	£0.12	£0.09	£1.61	£2.94		
Outside	Cwmbran Town Centre	£1.70	£1.35	£2.56	£1.50	£8.05	£0.78	£15.95		
Outside	Cwmbran - Elsewhere	£0.45	£0.16	£0.83	£0.56	£4.31	£0.04	£6.36		
Outside	Cardiff City Centre	£2.49	£2.13	£1.19	£0.99	£2.49	£4.37	£13.66		
Outside	Cardiff - Elsewhere	£0.37	£0.25	£0.33	£0.26	£0.74	£0.44	£2.39		
Outside	Newport City Centre	£0.25	£0.31	£0.31	£0.27	£0.90	£0.05	£2.09		
Outside	Newport - Elsewhere	£0.91	£0.40	£0.41	£0.23	£1.20	£0.13	£3.28		
Outside	Other	£0.92	£1.30	£1.67	£0.84	£3.66	£1.61	£9.99		
	Total	£33.95	£29.40	£28.62	£12.82	£37.18	£41.91	£183.88		

Table A8.28: Convenience Capacity - Blaenau Gwent (Base excluding Commitments)

		2018	2020	2025	2030	2033
Total Available Convenience Expenditure in Study Area (£m)	(a)	£136.68	£143.00	£134.01	£131.57	£130.32
Current Market share of Convenience destinations in study area	(b)	89.9%	89.9%	89.9%	89.9%	89.9%
Available Convenience Expenditure for destinations in study area	(c)	£122.93	£128.62	£120.53	£118.34	£117.22
Change in available spend to study area destinations (cumulative from 2018)	(d)		£5.68	-£2.40	-£4.59	-£5.72
Turnover of Convenience destinations (assuming no change in provision or sales efficiences)	(e)	£122.94	£122.94	£122.94	£122.94	£122.94
Turnover of Convenience destinations (allowing for changes in sales efficiences)	(f)	£122.94	£126.99	£122.84	£124.69	£125.82
Residual Convenience spend to support new convenience floorspace (cumulative) (£m)	**(g)**		£1.63	-£2.31	-£6.35	-£8.60
Benchmark Sales density for Convenience Floorspace (£ per sqm)	(h)		£9,812	£9,482	£9,736	£9,736
Amount of new convenience floorspace required (cumulative) (sqm net)	**(j)**		**166**	**-243**	**-652**	**-883**

Notes
(a) From Table A8.3
(b) Calculated from Table A8.9
(c) (a) x (b)
(d) Calculated from (c)
(e) From Table A8.9
(f) Calculated from (e) using forecast changes in sales efficiences from Experian Retail Planner Briefing Note 18, Figure 3a
(g) From (c) -(f)
(h) From Experian Retail Planner Briefing Note 18, Figure 3a
(i) Calculated from (g) and (h)

Table A8.29 : Comparison Capacity - Blaenau Gwent (Base excluding Commitments)

		2018	2020	2025	2030	2035
Total Available Comparison Expenditure in Study Area	(a)	£149.33	£131.90	£155.60	£172.21	£183.88
Current Market share of Comparison destinations in study area	(b)	46.0%	46.0%	46.0%	46.0%	46.0%
Available Comparison Expenditure for destinations in study area	(c)	£68.67	£60.66	£71.56	£79.20	£84.56
Change in available spend to study area destinations (cumulative)	(d)		-£8.02	£2.88	£10.52	£15.89
Turnover of Comparison destinations (assuming no change in provision or sales efficiences)	(e)	£68.68	£68.68	£68.68	£68.68	£68.68
Turnover of Comparison destinations (allowing for changes in sales efficiences)	(f)	£68.68	£61.41	£74.48	£85.42	£93.07
Residual Comparison spend to support new comparison floorspace (cumulative)	**(g)**		**-£0.75**	**-£2.92**	**-£6.23**	**-£8.51**
Benchmark Sales density for Comparison Floorspace (£ per sqm)	(h)		£4,450	£5,410	£6,971	£6,971
Amount of new comparison floorspace required (cumulative) (sqm net)	**(i)**		**-169**	**-540**	**-893**	**-1,221**

Notes
(a) From Table A8.5
(b) Calculated from Table A8.26
(c) (a) x (b)
(d) Calculated from (c)
(e) From Table A8.26
(f) Calculated from (e) using forecast changes in sales efficiences from Experian Retail Planner Briefing Note 18, Figure 3b
(g) From (c) -(f)
(h) From Experian Retail Planner Briefing Note 18, Figure 3b
(i) Calculated from (g) and (h)