Blaenau Gwent Retail and Leisure Study (August 2021)

Retail Capacity Update June 2023

1 Introduction

1.1. In 2020 Reeves Retail Planning Consultancy (RRPC) and Williams Gallagher (WG) were instructed by Blaenau Gwent County Borough Council (BGCBC) to undertake a Retail and Leisure Study (RLS) of the County Borough, to inform the Replacement Local Development Plan (RLDP) which the Council is in the process of preparing.

1.2. The final report was completed in August 2021, following delays due to the impact of the Covid-19 pandemic. However, even at that time the full impact of the pandemic on the retail and leisure sectors and town centres remained unknown. Since then, there have been further challenges to the economy, with inflation and energy costs reducing customer spending and increasing uncertainty. It is therefore important that the advice and conclusions provided in the RLS are reviewed regularly to ensure that it remains a sound evidence base for the RLDP.

1.3. This note is the first stage in this review process. It has been prepared on the instruction of BGCBC and its purpose is to assess the extent to which changes in the retail sector and/or the economy may be significant in terms of the advice previously provided to the Council.

1.4. The exercise comprises two main elements:

1) A review of the various assumptions made in forecasting retail capacity for the forthcoming plan period, to determine if the 2021 assessment of retail capacity remains valid; and
2) Site visits to assess whether there have been any significant changes within the town centres in Blaenau Gwent that would affect the policy advice previously provided.

1.5. First however, we consider the more general retail and town centre trends that have become apparent since the original report was prepared.

2 Retail and Town Centre Trends

2.1 Although it is only three years since work on the original study started, the intervening period has been one of many challenges for retail businesses and town centres in general. The initial lockdown as a result of the Covid-19 pandemic, starting in March 2020, was followed by further controls on trading and subsequent lockdowns later in the year and into 2021.

2.2 This directly impacted the extent to which people could or were willing to undertake physical shopping or leisure trips and online shopping and home delivery saw considerable growth. There was also a direct and significant impact on travel-to-work patterns.

2.3 These changes were in line with what was already happening in the sector prior to 2020, with competition from online shopping and out of centre retail meaning many town centres were already over-spaced in terms of their retail provision. However, the pandemic affected the speed with which the changes occurred, making it difficult for town centres to adjust to the rapid changes. It also affected the food and beverage sector and travel-to-work patterns, the long term effects of which remained clear in 2021.

2.4 Since then, there have been further unexpected changes, with businesses and residents facing economic challenges from other sources including rising inflation, increasing energy costs and supply problems, as a result of domestic and international events. There have also been strikes including those by rail workers which affects residents' ability and willingness to travel, potentially impacting on their shopping patterns.

2.5 It is now an appropriate time to review the extent to which the anticipated increase in 'local' shopping identified in the immediate aftermath of the pandemic and which it was considered could benefit Blaenau Gwent centres, has occurred and to assess whether there has been any immediate impact on town centre businesses as a result of higher business costs (utility bills and wages) and reduced available spend as a result of inflation.

3 Retail Capacity Assumptions

3.1 In preparing any retail capacity assessment a number of key assumptions have to be made regarding how population and available expenditure will change over time. Assumptions also have to be made regarding the popularity of online and other 'special forms of trading' (SFT) which may affect how much of the money available in an area is spent in physical shops.

3.2 For the BGCBC study which was prepared in 2021 the assumptions made were based on the best available information at the time, namely Experian's Retailer Planner Briefing Note 18 (BN18) prepared in October 2020.

3.3 Experian is one of the UK's leading suppliers of economic forecasts and they produce regular (usually annual) updates to their forecasts as to how retail expenditure is expected to change in the coming years. It is independently produced and has been used by many consultants over a long time period to assist in preparing retail capacity and impact studies.

3.4 The forecasts use centrally produced data on household spending and SFT from ONS and economic forecasts, to predict how they expect these and other factors will affect retail spending in the future.

3.5 The most recent Briefing Note now available is Briefing Note 20 (BN20) which was published in February 2023.

3.6 This reflects Experian's latest views on many aspects of expenditure growth and shopping behaviour. It recognises the many challenges to the economy noted above and these are reflected in their forecasts, including inflation, high energy costs and supply chain disruption. They anticipate that economic growth in the second half of 2023 will lack momentum due to on-going inflationary pressures, tight fiscal policy, heightened uncertainty and deteriorating labour conditions.

3.7 Global concerns regarding Covid-19 have been largely replaced by the focus on the Ukraine-Russia conflict but both will continue to influence government finances and the fiscal measures employed. As a result, Experian consider that their forecasts will be subject to greater than usual uncertainty and they suggest only a 40% probability for their central forecast scenario. This would see retail spending per head increasing by around 0.8% per annum between 2021 and 2030 and then by 2.1% to 2040.

3.8 A more optimistic case (with a 30% probability) would see a higher level of growth to 2030 (1.1% per annum), giving a cumulative increase of 2.7% of spending per head by 2030. In the longer term (2031 – 2040), the difference would be just 0.1% per annum (2.2% rather than 2.1%) from that envisaged in BN18.

3.9 The downside alternative scenarios are given a 25% probability for the main case and a 5% probability for the severe downside case, with retail spending growing at a considerably slower rate in the period to 2030 (0.5% per annum and 0.2% respectively). From 2031 growth rates improve to 2.0% or 1.9% per annum.

3.10 In the RLS, retail capacity is assessed at 2030 and 2035 and therefore some differences would be expected at those dates, if one of the lower probability scenarios were to prove to be correct. There would also be positive differences if the economy performed in line with the more optimistic scenario. However, as with the original capacity assessment, we are not aware of any reason at the present time, why Experian's central case forecasts should not be used, as it remains the most likely of the forecasts. The higher level of uncertainty does however mean that the retail capacity results should continue to be reviewed on a regular basis.

3.11 We have compared the various BN18 assumptions used in the retail capacity analysis in the RLS with the most recently published (central scenario) information, to determine if the changes would be expected to have a noticeable or significant effect on our previous capacity assessment.

3.12 At this stage we have assumed that the population projections are unchanged from those used in the 2021 study, given that new data is limited at the present time. However, it is intended that this input to the retail assessment will be reviewed in due course, when new ONS produced mid-year population estimates / forecasts based on the 2021 Census are available for Blaenau Gwent and/or when the expected population distribution as a result of policies in the RLDP is known.

3.13 The key influences on future retail capacity are the amount of money people have to spend at the start of the assessment period, how that is expected to grow in the future and then how much of this spend goes to physical shops and how much elsewhere, such as on online shopping (SFT).

3.14 The first of these inputs is set out in the RLS (Tables A8.2, A8.3, A8.4 and A8.5). We have then compared how the expected growth in expenditure and SFT has changed between BN18 and BN20 and the cumulative effect are set out below.

Convenience Capacity

3.15 For convenience goods, the figures suggest higher convenience spend at the beginning of the period than anticipated in BN18 and a less steep decline in 2021, as the immediate effects of the pandemic have become clearer. However, 2022 is now expected to see a real decline in convenience spend per head in physical outlets, which we anticipate is due primarily to inflation and the cost of living concerns. This continues into 2023 but after that annual rates of change become closer to the BN18 predictions.

Convenience Expenditure Growth 2018 - 2035

Year	BN18			BN20	
	Change YoY	Cumulative Index		Change YoY	Cumulative Index
2018		100.0			100.0
2018 exc SFT	-3.8%	96.2		-3.3%	96.7
2019	-1.3%	94.9		-0.4%	96.3
2020	6.1%	100.7		8.9%	104.9
2021	-5.3%	95.4		-2.3%	102.5
2022	0.2%	95.6		-6.8%	95.5
2023	-0.3%	95.3		-2.2%	93.4
2024	-0.2%	95.1		-0.7%	92.7
2025	-0.1%	95.0		-0.3%	92.5
2026	-0.2%	94.8		-0.2%	92.3
2027	-0.2%	94.6		-0.1%	92.2
2028	-0.1%	94.5		-0.1%	92.1
2029	-0.1%	94.5		0.0%	92.1
2030	-0.2%	94.3		0.0%	92.1
2031	-0.1%	94.2		0.0%	92.1
2032	0.0%	94.2		0.0%	92.1
2033	0.0%	94.2		0.1%	92.2
2034	0.0%	94.2		0.1%	92.3
2035	0.1%	94.3		0.1%	92.4

Notes

BN18 SFT and forecast changes in spend from Experian Retail Planner Briefing Note 18, Figures 5 and 6

BN20 SFT and forecast changes in spend from Experian Retail Planner Briefing Note 20, Figures 5 and 7

3.16 The overall effect of these changes is to reduce the expected available expenditure for convenience goods by around 2% by 2035.

3.17 In terms of convenience capacity to support new floorspace, this would suggest that the previously predicted oversupply would remain and/or increase if there is no change in provision or the performance of existing outlets (sales efficiencies) (RLS, Table A8.28).

3.18 The most recent estimates from Experian on efficiencies, referred to as retail sales densities, suggest that in practice the decline in available expenditure will see convenience outlets performing less well in the future in terms of turnover per sqm, with a 7.2% decline in densities expected in 2021 followed by a decline of 7.7% in 2022. In BN18 the equivalent figures were -4.8% and +0.7%.

3.19 The response that is expected (BN20, Figure 4a) is that the amount of convenience floorspace will decline in the longer term (from 2023), as retailers close unprofitable or poorly performing existing stores, a trend that is already being seen. This will allow longer term growth in sales densities at the remaining outlets. Some new stores will continue to be developed to meet specific locational or qualitative needs, but overall convenience floorspace provision in the UK is expected to fall from 172.9m sqft in 2022 to 163.9m sqft in the period 2030-2040.

3.20 This therefore reinforces our previous advice that there will be no quantitative need for additional convenience floorspace provision in Blaenau Gwent during the plan period.

Comparison Capacity

3.21 The comparison spend figures show similar patterns of change, with the downturn at the beginning of the period being greater and lasting longer than previously anticipated, given Covid-19 impacts are now being compounded by inflation and cost of living rises.

Comparison Expenditure Growth 2018 - 2035

Year	BN18			BN20	
	Change YoY	Cumulative Index		Change YoY	Cumulative Index
2018		100.0			100.0
2018 exc SFT	-16.8%	83.2		-16.1%	83.9
2019	3.4%	86.0		-0.3%	83.6
2020	-14.5%	73.6		-18.1%	68.5
2021	8.1%	79.5		6.0%	72.6
2022	2.9%	81.8		2.0%	74.1
2023	2.7%	84.0		-1.0%	73.3
2024	2.0%	85.7		-0.8%	72.7
2025	1.9%	87.3		0.3%	73.0
2026	2.0%	89.1		1.6%	74.1
2027	2.1%	91.0		2.2%	75.8
2028	2.3%	93.0		2.4%	77.6
2029	2.4%	95.3		2.5%	79.5
2030	2.5%	97.7		2.6%	81.6
2031	2.5%	100.1		2.6%	83.7
2032	2.5%	102.6		2.7%	86.0
2033	2.6%	105.3		2.7%	88.3
2034	2.6%	108.0		2.8%	90.8
2035	2.7%	110.9		2.8%	93.3

Notes

BN18 SFT and forecast changes in spend from Experian Retail Planner Briefing Note 18, Figures 5 and 6

BN20 SFT and forecast changes in spend from Experian Retail Planner Briefing Note 20, Figures 5 and 7

3.22 The period to 2025 will therefore see greater pressure on comparison retailers as the spend available for retail shops will continue to fall. After 2025 growth rates will improve to levels similar to, or possibly higher than forecast in BN18, but the overall effect by 2035 remains that available comparison spend will be considerably lower than anticipated in the RLS.

3.23 In terms of comparison capacity to support new floorspace, this would again suggest that the previously predicted oversupply would remain and/or increase if there is no change in provision or the performance of existing outlets (sales efficiencies) (RLS, Table A8.29).

3.24 A review of the Experian sales density forecasts for comparison goods, suggests a less significant change in BN20 from that forecast in BN18. A small decline in efficiencies is now expected in 2023 and 2024 reflecting current pressures on household finances, rather than the improvement in performance previously expected, but growth is expected from 2025 onwards, albeit at a slightly lower rate.

3.25 Experian expect this to result in very little change in comparison floorspace in the period 2022 – 2029, with a small increase seen beyond that (BN20, Figure 4b). The rest of the improved available spend will benefit existing outlets, seeing increasing sales densities.

3.26 This therefore reinforces our previous advice that there will be no quantitative need for additional comparison floorspace provision in Blaenau Gwent during the plan period.

4 Qualitative Need and Centre Health

4.1 The second stage of this update has been to undertake site visits to each of the five centres in Blaenau Gwent to determine whether there have been any significant changes in the town centres that would require our previous advice to be reviewed.

4.2 For the avoidance of doubt, it has not involved a detailed assessment of the changes to individual units but our advice is informed by the Council's Town Centre Survey results for 2021 and 2022. The results for the individual centres are considered below.

Ebbw Vale

4.3 In 2021 we concluded that Ebbw Vale town centre was generally healthy with a good convenience and comparison offer and below average vacancies. In the SWOT analysis the main threats were noted as being the loss of further multiples, especially within The Walk, the closure of a bank and the closure of Festival Park which will have reduced trade inflows to the area.

4.4 Our visit in May 2023 suggested relatively little change in the centre since 2021 and this is confirmed by the town centre summary of uses:

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
2021	46.4% (58)	12% (15)	13% (16)	1.6% (2)	1.6% (2)	0% (0)	3% (4)	1% (1)	6.4% (8)	15% (19)	125
2022	45% (56)	11% (14)	13% (16)	3% (3)	1% (1)	0% (0)	3% (4)	2% (2)	10% (12)	12% (15)	124

Notes

7 more units created in 2020 at Shopping Mall (units M2 - M8) total of 8 units 1 already existing (was Store 21)

4.5 Argos is continuing to trade at The Walk, despite closures elsewhere and one of the smaller units at The Walk is now occupied by Hays Travel (was previously occupied by Age Cymru). As such The Walk continues to provide a good retail offer.

4.6 Elsewhere in the town centre B&M Express has closed but the unit has been reoccupied by Heron Foods. Convenience representation therefore remains good. However, it has been announced that the Barclays Bank on Bethcar Street is to close in June. This will leave the centre with just one bank (Lloyds).

4.7 On its own, this closure does not change our overall conclusions regarding the health of Ebbw Vale town centre, nor does it impact on our previous policy recommendations. However, it confirms the need to promote social and economic growth in the centre during the plan period (Policy SP1).

Abertillery

4.8 In the RLS we advise that, whilst Abertillery town centre is generally a healthy and attractive centre, it appears to be oversized for its current role and changes to remove areas from the Primary Retail Area and town centre are recommended.

4.9 Our visit in May 2023 and a consideration of the Council's recent town centre surveys confirms that this advice remains appropriate.

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
2021	41% (52)	8% (10)	18% (23)	1.5% (2)	0% (0)	1.5% (2)	4% (5)	0% (0)	9% (11)	17% (21)	126
2022	39% (50)	7% (9)	18% (23)	1.5% (2)	0% (0)	1.5% (2)	4% (5)	0% (0)	9% (11)	20% (25)	127

4.10 The main retail outlet on Somerset Street, The Original Factory Shop is closing on 19th May and the former bed shop on High Street has already closed, further reducing the retail offer in the south of the town centre and supporting our previous view that the retail floorspace in the centre is greater than now required.

4.11 Policy support to encourage a range of town centre uses or residential development rather than seeking to retain retail uses in this area (Policy DM5) therefore remains relevant.

Brynmawr

4.12 Brynmawr town centre and adjoining area has seen the greatest changes since 2021, with development on the former NMC factory site now complete and trading as the Brynmawr Retail Park. This appears to be a popular development and with a new retailer (The Range) expected to move into the former Home Bargains unit at Lakeside Retail Park, trade retention in the area would be expected to have improved.

4.13 The potential for increased footfall to the town centre as a result of more linked trips remains a possibility, but we consider that improved pedestrian linkage is required for this to be fully realised. In particular, the pedestrian route from the Lakeside Retail Park is very poor and with no linkage through the NMC scheme, it feels a more peripheral location.

4.14 Within the town centre itself, it remains a concern that the existing offer does not provide a sufficient draw to encourage linked trips and we note that a further unit at the south end of Beaufort Street (Rogers – Footwear and Sports) is due to close soon due to retirement. Greggs has also relocated to the new Retail Park.

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
2021	47% (48)	13% (13)	18% (19)	0% (0)	0% (0)	2% (2)	2% (2)	3% (3)	9% (9)	6% (6)	102
2022	44% (45)	10% (10)	17% (18)	0% (0)	0% (0)	2% (2)	2% (2)	3% (3)	11% (11)	11% (11)	102

4.15 However, more positively, the new 'Conscious Coffi Bar' on Bailey Street and the restaurant next to One-Stop at the north of Beaufort Street appear to be popular, with the former well located to both benefit from, and encourage linked trips from the retail parks. The reopening of Draig Homeware and Gifts opposite could also be a draw in a strategic location.

4.16 It is too early to assess the long term effect of the NMC Factory development but the potential for the town centre to benefit from the draw of the new edge of centre retail remains. Whilst not a planning policy consideration, better pedestrian linkage would encourage such interaction and we would recommend this is investigated.

4.17 Otherwise, there is nothing that has changed from what was anticipated in the town centre or at the retail parks and our policy recommendations remain unchanged.

Tredegar

4.18 In Tredegar the separation between the main retail and leisure parts of the town centre remains the key challenge to the overall health and vitality of the centre but the other, previously identified threats to it, remain only as potential threats. The Barclays bank in the central part of the town centre continues to operate (although with reduced hours) and national multiple representation remains reasonably good. There has also been some investment in the Gwent Shopping Centre and the retail and leisure offer now provided appears to be popular, although vacancies remain.

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
2021	45% (69)	7% 912)	17% (26)	1% (1)	0% (0)	1% (1)	3% (5)	1% (1)	11% (17)	14% (22)	154
2022	43% (67)	8% (13)	17% (27)	1% (1)	0% (0)	1% (1)	3% (5)	1% (1)	11% (17)	15% (24)	156

4.19 Our previous recommendations regarding changes to the Primary Shopping Area and policies therefore continue to remain appropriate.

Blaina

4.20 Changes in Blaina centre have been limited and the key anchors of the Co-op foodstore and the Post Office remain trading. However, the Post Office is currently being marketed for sale and, whilst this is as an existing business and family home, there is some uncertainty regarding its longer term future.

4.21 The closure of the Post Office would be a significant loss to the centre, but this is not a change that can be managed by planning policy. It would however further weaken what is already a weak centre and we remain of the view that there is no policy requirement to distinguish it from the neighbourhood centres in the County Borough.

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
2021	25% (13)	4% (2)	11% (6)	1.9% (1)	0% (0)	22.6% (12)	1.9% (1)	0% (0)	7.5% (4)	26% (14)	53
2022	25% (13)	2% (1)	13% (7)	2% (1)	0% (0)	22.6% (12)	2% 91)	0% (0)	9% (5)	24% (13)	53

4.22 Our advice on planning policies and the suggested removal of the town centre boundary therefore remains unchanged