

Forest of Dean Market Towns

Annual Town Centre Monitoring Reports

July 2022 to July 2023

Executive Summary

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1. Visitor Trends & Insights

'Visitor' refers to a unique singular person visiting a specific destination.

On average, 70% of visitors live within a 10-mile radius of each town centre. This percentage is slightly higher in Cinderford, 76%. On average, 30% of visitors to each town live over 10 miles away, this percentage significantly increases in the Summer months; particularly in Lydney and Coleford (up to 50%), which suggests links to tourism in these two towns.

It should be noted that the number of visitors in all four towns undoubtedly peaks in the Summer, whereas in the Winter, footfall also peaks in Lydney and Cinderford. Suggesting increased footfall in the Winter is likely linked to local residents using the town centres pre-Christmas and, in the Summer, non-local visitors are also using the towns centres, likely driven by tourism.

July 2023 saw the highest number of unique visitors in each market town, an increase of 50% across all four towns when compared to July 2022 data. February 2023 had the lowest number of unique visitors.

For more detailed information on visitors, see appendices 3, 4 & 5.

2. Footfall

'Footfall' refers to the number of visits made to a specific destination, which could be multiple visits by a singular person.

Positively, footfall has grown year-on-year in all four market towns. The highest footfall was recorded in Lydney in November 2022 (188,542) and the lowest footfall was recorded in Newent in February 2023 (37,085). However, Newent has seen the highest growth in footfall year-on-year at +19.3%, but even in its peak footfall month of July 2023 (42,549), footfall was still significantly lower than the other three market towns.

Lydney and Cinderford have the highest numbers of footfall which correlates with the higher population of people living in these two towns. Both towns benefited from two peak footfall periods within the year: pre-Christmas (October, November, December) and summer holidays (June, July).

Looking month-to-month, Coleford and Newent see little fluctuation in footfall figures. Unlike Lydney and Cinderford, there is not a significant peak or dip in footfall throughout the year.

To give a good indication of how the towns are recovering since Covid-19, it's beneficial to look at 2023 vs 2019 data (pre-pandemic). Lydney is showing signs of the strongest recovery, 7 of the 12 months in 2023 have higher footfall than 2019 data. For the other three towns, only June and July 2023 have higher footfall than the comparative 2019 data. For more information see page 13 of each town monitoring report.

All four towns could benefit from trying to improve footfall in April and May time when it's Easter and school holidays. Coleford could seek to improve its pre-Christmas footfall in the months of November and December and Newent needs further investigation to understand why footfall is not recovering as quickly as the other towns.

In the days of the week, Friday has the highest levels of footfall across all four towns. Closely followed by Thursday and Saturday. Sunday has the lowest level of footfall across all four towns, closely followed by Monday. There is potential to strategically increase footfall and spend in towns on these two days, especially in the summer months when the Forest of Dean receives more unique visitors who are likely to stay for longer weekend breaks (Thursday – Monday). For more detailed information on footfall, see appendix 2.

3. Local Loyalty

Cinderford: On average, 60% of residents in Cinderford visit the town centre every month and 80% of all visitors to Cinderford live within a 10-mile radius of the town. Mitcheldean is the most loyal neighbouring town to Cinderford. 45% of Mitcheldean's population visit Cinderford every month, compared to only 15% of Coleford and 12% of Lydney's. Cinderford receives around 1,000 visitors a month from Ross on Wye and 350 from Newent.

Coleford: On average, 62% of residents in Coleford visit the town centre every month and 70% of all visitors live within a 10-mile radius of the town. Lydney is the most loyal neighbouring town to Coleford. On average 26% of residents in Lydney visit Coleford every month. Cinderford is second, with 14.3% of its population visiting each month. Coleford is the closest forest town to Monmouth and the Wye Valley Area of Outstanding Natural Beauty. It receives around 1,000 visitors every month from Monmouth, Chepstow and Mitcheldean.

Lydney: Of all the four forest towns, Lydney has the highest percentage of residents using its town centre each month, 77%. 70% of all visitors to Lydney live within a 10-mile radius. Coleford is the most loyal neighbouring town to Lydney, closely followed by Cinderford. On average, 28% of Coleford's residents visit Lydney every month, and 26% of Cinderford's. Being so close to the Welsh border, Lydney has a close connection to Chepstow and Newport, receiving around 2,500 visitors a month from Chepstow and 1,000 from Newport.

Newent: Of the four forest towns, Newent has the lowest percentage of residents using its town centre each month, 53.7%. 70% of all visitors to Newent live within a 10-mile radius. Within the Forest of Dean District, Mitcheldean is the most loyal neighbouring town to Newent. Mitcheldean is also the most loyal neighbouring town to Cinderford. Of the four main market towns in the Forest of Dean, Cinderford is the most loyal town to Newent, although visitors are low (around 300 people per month). There might be an opportunity to strategically strengthen the relationship between Newent, Mitcheldean and Cinderford in attempt to increase footfall and retail offer for the residents in these areas of the district. Newent also receives around 800 visitors a month from Hartpury/Redmarley, 650 from Ledbury and 500 from Ross on Wye.

4. Car Parking

In Cinderford, Heywood Road car park sold 18,616 tickets from July 22 – June 23. Ticket sales at Heywood Road car park have not recovered to pre-covid levels but are improving year-on-year, and by approximately 36% since 2020. Heywood Road would need to sell around an additional 12,700 tickets annually to reach pre-covid levels.

In Coleford, Railway Drive car park sold 99,687 tickets and Newland Street car park sold 5,056 from July 22 – June 23. Ticket sales in both car parks have not recovered to pre-covid levels but are improving year-on-year. Railway Drive would need to sell around an additional 50,000 tickets, and Newland Street 1,200 tickets annually to reach pre-covid levels.

In Lydney, Newerne Street car park sold 52,979 tickets and Bream Road sold 10,711 from July 22 – June 23. Ticket sales in both car parks have not recovered to pre-covid levels but are improving year-on-year. Newerne Street would need to sell around an additional 22,600 tickets, and Bream Road 2,800 tickets annually to reach pre-covid levels.

In Newent, Lewell Street car park sold 35,978 tickets from July 22 – June 23. Ticket sales have not recovered to pre-covid levels but are improving year-on-year. Lewell Street would need to sell around an additional 17,000 tickets to reach pre-covid levels.

For more information see '2.3 Car Parking' in the Annual Town Audit reports.

5. Crime

Between July 2022 – July 2023, the most significant increase in reported crime was recorded in Coleford (+40% year on year). Whilst this number seems high, it's important to note this figure represents reported crime, not actual crime. It could be that Coleford's community feel more confident and vigilant to report the crimes they witness. There has been an increase in footfall in the town however it is disproportionate to the rise in reported offences. Coleford has the most night-time venues which could be a contributing factor however further investigation would be required to understand what's definitely caused the spike in crime. Around 50% of crime in Coleford was from reported incidents of violence, sexual offences and anti-social behaviour.

Around 50% of crime in Coleford, Cinderford, Lydney and Newent are reported incidents of violence, sexual offences and anti-social behaviour.

Crime in Newent has fallen by -35%. Newent has also one of the highest vacancy rates and lowest footfall which could be a contributing factor.

See Appendix 7 for more information.

6. Retail & Commercial Offer

Food & Drink: Coleford and Lydney have the largest, and most diverse offer of food and drink establishments, including a Thai, Italian and Mexican restaurant. Lydney has the largest number of cafes, which is representative of its larger population. Cinderford only has 2 cafes and 1 restaurant, which seems low given its population and high footfall. There are significantly more takeaways than restaurants in each town, indicating people using the towns are more inclined to 'take-out' their food or travel to eat-out. There are 2-3 pubs in each town, not all serve food but this could work for their business model. Food and drink are a key anchor for people to enjoy and use their towns, and pubs are important for socialising. The future of what food and drink looks like in the town centres needs further investigation, specifically which demographics of people are and are not being catered for.

Hair & Beauty: Lydney has the highest number of hair and beauty establishments which is representative of its larger population. In the data, all four towns appear to have a good amount of hair and beauty shops to cater for their populations. Further qualitative data would be required to understand if any industry specific or niche services are in demand but not catered for, or residents must travel outside of the Forest to access them.

Health & Wellbeing: In the middle of Newent is the 'Wellness Barn & Lodge'. Newent also has a pilates studio, health foods shop, a 'minimum waste shop' and 'dog spa' – which makes it a holistic hub for wellness activity in the town. Newent is also situated next to a big lake and lots of nature. Cinderford has a lot of community spaces dedicated to the wellbeing of its residents, including the new FVAF volunteer centre, and a health foods shop - it feels as though there is scope to build 'community wellness' as a theme into the town's identity. Coleford has 'Spa Rituals', 'Sun Studio' and a podiatrist which gives a nod to 'wellness', but it does not feel like an established 'theme' or priority for the town. Lydney has a podiatrist and 'eco-shop' in the middle of town but 'wellness' does not feel like an integrated priority for the town.

Tourism & Hotels: Coleford, Lydney and Newent have a hotel in the town centre – The Angel in Coleford, The Swan in Lydney and The George in Newent. There is no presence of any B&Bs in the four towns. Albeit, we do not have visibility on what property is used as holiday-letting websites such as Airbnb. Just outside of Coleford is Forest Hills Golf Club & Holidays, Bells Golf Club & Hotel and Greenacres Campsite which are all in walking distance of the town centre.

Visitor data suggests Lydney and Coleford attract the most tourists in the Forest of Dean. Coleford is also home to the Forest of Dean tourist information centre.

Below lists the key tourist destinations which are closest to each town. This is important to bear in mind as the type of tourist destination will determine the demographic of people which are attracted to each town (i.e. families, couples, explorers, artists, historians...)

Coleford: [Puzzlewood](#), [Perrygrove Railway](#), [Bells Golf Club](#), [Forest Hills Golf Club](#), [Forest of Dean Cycle Centre](#), [Beechenhurst Sculpture Trail](#), [Hopewell Colliery](#), [Clearwell Caves](#), [St Briavels Castle](#) and [Symonds Yat](#).

Lydney: [Lydney Harbour](#), [Dean Forest Railway](#), [Taurus Crafts](#), [Bathurst Pool](#), [Bathurst Park & Boating Lake](#), [Nags Head Nature Reserve](#) and [Lydney Park Estate](#).

Cinderford: [Littledean Jail](#), [Mallards Pike](#), [Bespoke Brewery](#), [Dean Heritage Centre](#), [Birds Pottery](#), [St Anthony's Well](#), [Harts Barn Cookery School](#) and [The Rusty Pole...](#)

Newent: [Museum of Board Games](#), [Newent Lake](#), [Three Choirs Vineyard](#), [Millennium Arboretum](#), [Newent Golf Club](#), [Briery Hill Llama Trekking](#), [May Hill](#) and [Leaf Creative](#).

Shops & Vacancies: Vacant retail units are a growing problem in Cinderford, Lydney and Newent. The percentage of vacant commercial units in Cinderford and Newent is higher than the national average. Cinderford has the highest vacancy rate at 17.8%, closely followed by Newent 17.2% vs the national average of 14%. Vacant commercial units in Coleford is less of a concern at 6.4% and is the only town to have decreased vacant units year-on-year.

The rise of internet shopping and disruption to town centres caused by the pandemic has changed the way shops and businesses operate in our town centres. This presents an opportunity for the communities in each town to re-think and co-create how vacant space is used in the town centres to meet the needs of its residents and tourists, as well as work towards the council's goal of becoming a carbon neutral district by 2030. Innovation will be key.

Across all four towns, on average, 'shops' make up 26% of commercial space in the market towns.

Recreation, Hobbies & Amusement: Art galleries, cinemas, museums, fitness centres and much more, draws people into a town centre and increases dwell time. The percentage of recreational activities in each town is very low (av. 1.7%). Cinderford and Coleford have a cinema. Cinderford and Newent have a small art gallery. Newent and Coleford have museums, albeit very niche (Board Games and Railway). The fitness centres in all towns are outside of the town boundaries, apart from a small pilates studio in Newent. There is an opportunity to improve the breadth of recreational activities in all four market towns which reflect the hobbies and interests of residents in each town.

Services & Estate Agents: Services such as solicitors, pharmacies, opticians, dentists, estate agents and repair shops are a vital part of a town's eco-system. On average, services and estate agents make up 21.4% of the four towns commercial space in the Forest of Dean. The percentage of services in each town looks healthy and proportionate to each population however more qualitative data is

needed to understand if any specific services are missing or in demand from residents and/or tourists.

Community Spaces: Cinderford has the highest percentage of community spaces in its town centre, supported by the new Levelling Up funded facilities (The Wesley, Rheola House co-working spaces and The Music Works), the FVAF volunteer centre, Artspace and CANDI Drop-In centre (6.9%). The percentage of community spaces in Lydney and Coleford looks disproportionately low in comparison to their large populations (av. 2.6%). It would be beneficial to understand if the community spaces in each town are meeting the needs of residents, and if not, what spaces are missing (and for what demographics of people).

Offices & Industry: The office space in all four towns is low. As more people work from home, this is to be expected – however the movement away from working in town centres has had a knock-on effect to the shops, services and businesses in a town centre, who as a result, miss out on sales and building loyalty with customers from office workers. It would be beneficial to understand what the demand is for office space in town centres, and what the future of office space or ‘hot-desking’ looks like in rural towns.

For more information see appendices 6 and 8.

7. Evening and Night Time Economy

Coleford has 11 establishments which generate income in the evening and night time, the most of all the four towns. It would be interesting to understand if the other three towns travel to visit Coleford in the evenings. Lydney only has 5 evening and night time venues, considering Lydney has the largest population and attracts the most visitors, this number seems low and could be an opportunity for the town. Newent has 5 establishments which generate income in the evening and night time, 2 of these venues are Indian restaurants. Cinderford has 4 establishments which generate income in the evening, the lowest of all four towns but includes a cinema.

	Cinderford	Coleford	Lydney	Newent
Pub	2	4	2	3
Cinema	1	1	0	0
Restaurant	1	5	3	2
Music/Dancing	0	1	0	0
Other/Miscellaneous	0	0	0	0

Appendices

Appendix I: Local Demographics and Diversity in 4x Forest of Dean Market Towns

Local Demographics and Diversity	Population	Age	Sex	Place of Birth	Identity	Work
Cinderford	8,800	17.7% Under 15 60.3% 16-64 22% 65+	50.4% female 49.6% male	5.7% of residents were born outside of the UK (approx. 500 people)	0.52% of people identify as a different gender from their registered sex at birth. (approx. 46 people) 2.47% of people identify as lesbian, gay, bisexual or other (LGB+) (approx. 217 people) Ethnicity: 96.8% White 1.2% Mixed or multiple ethnic groups 1.0% Asian, Asian British, Asian Welsh 0.2% Black, Black British, Black Welsh, Caribbean or African 0.7% Other ethnic groups	56% of Cinderford's population is 'Economically Active'. 41.1% of residents stated that they are 'Economically Inactive'.
Coleford	9,300	16.9% Under 15 58% 16 - 64 25.1% 65+	51.2% female 48.8% male	3% of residents were born outside of the UK (approx. 231 people)	0.3% of people identify as a different gender from their registered sex at birth. (approx. 23 people). 2.06% of people identify as lesbian, gay, bisexual or other (LGB+) (approx. 158 people) Ethnicity: 98.4% White 0.7% Mixed or multiple ethnic groups 0.6% Asian, Asian British, Asian Welsh 0.2% Black, Black British, Black Welsh, Caribbean or African 0.3% Other ethnic groups	56.3% of Coleford's population is 'Economically Active'. 43.7% of residents stated that they are 'Economically Inactive'.
Lydney	10,000	17.1% Under 15 59.2% 16 - 64 23.8% 65+	51.2% female 48.8% male	4.9% of residents were born outside of the UK (approx. 490 people)	0.42% of people identify as a different gender from their registered sex at birth. (approx. 40 people) 2.7% of people identify as lesbian, gay, bisexual or other (LGB+) (approx. 270 people) Ethnicity: 97.7% White 0.9% Mixed or multiple ethnic groups 0.8% Asian, Asian British, Asian Welsh 0.3% Black, Black British, Black Welsh, Caribbean or African 0.4% Other ethnic groups	59.1% of Lydney's population is 'Economically Active'. 40.9% of residents stated that they are 'Economically Inactive'.

Newent	6,300	17.2% Under 15 57.7% 16 - 64 25.1% 65+	51.8% female 48.2% male	10.5% of residents were born outside of the UK (approx. 660 people)	0.42% of people identify as a different gender from their registered sex at birth. (approx. 26 people) 2.90% of people identify as lesbian, gay, bisexual or other (LGB+) (approx. 180 people) (7.52% did not answer). Ethnicity: 96.7% White 1.4% Mixed or multiple ethnic groups 0.6% Asian, Asian British, Asian Welsh 0.5% Black, Black British, Black Welsh, Caribbean or African 0.8% Other ethnic groups	40.9% of residents stated that they are 'Economically Inactive'
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Appendix 2: Footfall in 4x Forest of Dean Market Towns (July 22 – July 23)

22-23 Footfall	Year on Year (vs. 21/22)	Peak Footfall	Dip Footfall
Cinderford	+18.3%	145,576 (Oct. 23) 144,008 (June 23)	125,426 (Feb 23)
Coleford	+6.3%	118,872 (June 23)	110,053 (Apr. 23)
Lydney	+16.4%	188,542 (Nov. 22) 184,797 (June 23)	165,903 (Jan. 23)
Newent	+19.3%	42,549 (July 23)	37,085 (Feb 23)

Appendix 3: Number of unique visitors to each market town in the Forest of Dean (July 22 – July 23)

Unique Visitors Per Month / peak unique visitor months	Cinderford	Coleford	Lydney	Newent
Jul-22	22,820	27,386	35463	11958
Aug-22	32,222	29,526	44562	14719
Sep-22	29,229	28,526	42257	15711
Oct-22	29,523	26,820	42275	13335
Nov-22	31,321	27,386	47714	16082
Dec-22	26,192	21,850	36420	11844
Jan-23	25,522	21,623	34133	8464
Feb-23	17,198	18,317	27715	6909
Mar-23	21,133	24,120	34214	10417
Apr-23	24,300	23,995	34729	10836
May-23	35,950	27,386	54543	20593
Jun-23	29,908	35,147	47653	17527
Jul-23	35,468	43,899	61,311	21,872
Average amount of visitors per month:	27,753	27,383	41,768	13,867

Appendix 4: % of visitors from +10 miles away to each forest market town per month (July 22 – July 23). The numbers highlighted indicate the highest % of visitors visiting from +10 miles away. Over 45% in Coleford and Lydney for the months of June and July.

% of visitors from +10 miles away per month	Cinderford	Coleford	Lydney	Newent
Jul-22	17%	36%	25%	26%
Aug-22	23%	26%	27%	25%
Sep-22	20%	24%	26%	30%
Oct-22	21%	27%	29%	27%
Nov-22	29%	36%	38%	27%
Dec-22	17%	21%	24%	28%
Jan-23	17%	22%	18%	17%
Feb-23	19%	15%	17%	17%
Mar-23	19%	27%	23%	29%
Apr-23	22%	27%	25%	27%
May-23	41%	36%	44%	40%
Jun-23	33%	48%	39%	38%
Jul-23	38%	51%	49%	44%
Average amount of visitors from +10 miles away per month:	24%	30%	30%	29%

Appendix 5: Average % of visitors travelling to each market town and average of number of unique visitors per month.

	Average amount of visitors within a 10-mile radius of the town centre.	Average amount of visitors from +10 miles away from the town centre.	Average amount of visitors per month.
Cinderford	76%	24%	27,753
Coleford	70%	30%	27,383
Lydney	70%	30%	41,768
Newent	71%	29%	13,867

Appendix 6: Retail and Commercial Unit Analysis

Retail & Commercial Unit Analysis	Lydney		Coleford		Cinderford		Newent	
	Population: 10,000		Population: 9,300		Population: 8,800		Population: 6,300	
	No. of units in each town	% of retail space in town	No. of units in each town	% of retail space in town	No. of units in each town	% of retail space in town	No. of commercial units in each town	% of retail space in town
	Total: 168		Total: 140		Total: 101		Total: 93	
Cafes	12	7.1%	5	3.5%	2	2.0%	4	4.3%
Community Space	5	2.4%	4	2.8%	7	6.9%	5	5.4%
Estate Agent	5	3.0%	4	2.8%	3	3.0%	4	4.3%
Hair & Beauty	23	13.7%	16	11.3%	12	11.9%	13	14.0%
Hotel	0	0.0%	1	0.75%	0	2.0%	1	1.1%
Office Space	2	1.5%	1	0.75%	2	2.0%	0	0.0%
Pub	2	1.5%	3	2.1%	2	2.0%	3	3.2%
Recreational	0	0.0%	2	1.4%	2	2.0%	3	3.2%
Restaurant	3	1.8%	6	5.0%	1	1.0%	2	2.2%
Shops	37	22.0%	49	34.8%	20	22.8%	23	24.7%
Services	46	27.4%	31	22.0%	23	19.8%	15	16.1%
Takeaway	10	6.0%	9	6.4%	9	8.9%	4	4.3%
Vacant	23	13.7%	9	6.4%	18	17.8%	16	17.2%

Appendix 7: Total amount of crimes reports within each town centre boundary between July 22 – July 23 (Police UK)

	Cinderford	Coleford	Lydney	Newent
Violence and Sexual Offences	29	71	102	40
Anti-Social Behaviour	23	50	50	15
Criminal Damage and Arson	3	17	15	7
Vehicle Crime	1	1	4	-
Burglary	9	10	19	2
Other Theft	9	13	19	7
Drugs	6	-	5	4
Robbery	1	-	1	-
Shoplifting	12	26	19	8
Other Crime	2	3	7	4
Public Order	30	40	44	18
Theft from a Person	3	3	3	2
Possession of a Weapon	4	3	2	-
This Year	132	237	290	107
Last Year	154	158	283	153
Year-on-year Difference	-15.40%	40%	2.45%	-35.40%

Appendix 8: Retail and commercial space percentage split by town

